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## **Addendum B - Performance Work Statement**

### **1.0 INTRODUCTION**

#### **1.1 Scope**

The scope of this contract is to acquire contractor support services for the Social Security Administration (SSA) in the following areas:

- 1) Technical and problem resolution support services through the SSA Information Center (IC) to all SSA employees in the use of COTS desktop software;
- 2) Technical assistance in the use of desktop software and direct local area networking (LAN) support for the following Executive Level offices:
  - a) The Office of the Commissioner (OC) in Baltimore, MD as well as OC and satellite support staffs in Washington, D.C.;
  - b) The front office staff under the Office of the Deputy Commissioner of Systems (ODCS);
  - c) All employees under the Office of the Chief Information Officer (CIO); and
  - d) All employees under the Office of the Chief Strategic Officer (OCSO).
- 3) Technical assistance, problem resolution and trouble-shooting support services to SSA developers in the design and development of applications using web-based software tools.

#### **1.2 Expected Outcome**

The Social Security Administration expects to gain efficient, high quality, customer-oriented contractor technical support for its 65,000 employees located nationwide. Contracting for these services will allow SSA staff to focus on providing improved service delivery to the public, while at the same time, reduce costs through innovative solutions by the contractor.

#### **1.3 Assumptions**

The assumptions listed below apply to this requirement:

- SSA has determined that requests for assistance and problem resolution support will be sustained at current or higher levels under the new contract.
- The current and future workloads are increasing in complexity and require advanced technical skills to meet the expected high levels of customer service.
- The SSA end-user community has become more sophisticated, asks highly complex and involved questions, and requires more advanced technical skills in the Help Desk personnel to solve their problems.
- The Desktop Refreshment will continue throughout SSA on a planned four-year cycle within the Office of Systems.
- SSA staff resources will continue to be assigned to critical program-related projects.
- The costs associated with the acquisition of hardware, software and supplies are the responsibility of SSA and are not part of the requirements being requested.
- The requirements do not include software development, which is the responsibility of the individuals requesting assistance.
- All contractor personnel are required to start work on the award date for each task order or as specified herein.
- Extended hours may apply. There may be occasions when the contractor staff will be required to provide services beyond the regular hours of operation. In these instances, the contractor shall follow the procedures stipulated in the BPA.
- The Government will provide the necessary hardware/software, technical materials and facilities to accommodate the on-site support.
- The hours of support required are delineated in each task order or Request for Task Order (RFTO).
- SSA shall obtain experienced contractor staff who have worked in a Help Desk environment providing desktop software and LAN support.

#### **1.4 Constraints**

The constraints listed below apply to this requirement:

- The contractor shall be responsible for the training of contractor personnel at the contractor's expense and on non-Government time.
- SSA realizes that contractor workloads may temporarily experience peaks and valleys for one or more of the task orders. If this situation arises, SSA will require contractor flexibility to shift staff between task orders to meet SSA workload requirements.

#### **1.5 General Information**

- At least fifty percent (50%) of the contractor staff that provides LAN networking support for Task Order 2, the Office of the Commissioner and Executive Level Support Services, should have completed MCSE certification.
- At least fifty percent (50%) of the contractor staff that provides support for Task Order 1, the IC Support Services, should have completed at least one of the following certifications: MCSE, MCSA, MCSA, MCSA, A+, or Inet.
- Resumes for all key personnel shall be provided to the Government. The Government reserves the right to accept or reject any key personnel at any time with just cause.

### **2.0 GENERAL REQUIREMENTS**

The contractor shall provide support to approximately 65,000 SSA employees. These employees are located in Baltimore, Maryland, Washington, D.C., satellite offices, field offices, Regional Offices, TeleService Centers, Hearings Offices and Office of Hearings and Appeals Regional Offices nationwide. This contract shall provide continuation of information technology support in the following areas:

- 1) IC technical and problem-resolution support services to all SSA employees in the use of desktop software;
- 2) Technical assistance in the use of desktop software and direct LAN support for the following offices:
  - OC
  - ODCS Front Office

- CIO
  - CSO
- 3) Technical assistance, problem resolution and trouble-shooting support services to SSA developers in the design and development of web-applications using office automation tools, with emphasis on web-based software tools.

Detailed requirements pertinent to all task orders are listed in this PWS. Specific requirements for each of the above-mentioned areas are listed in separate Requests for Task Orders (RFTO). The RFTOs will be issued for each of the above requirements. The expected duration of the contract will be seven years with work being issued annually.

### **3.0 DELIVERABLES DESCRIPTIONS**

This section describes general deliverables. The general deliverables are deliverables required by all three task orders. In addition, the IC requires other specific deliverables which are described in the Request for Task Order 1, Information Center Support Services.

All deliverables shall be provided in hardcopy and electronic format using SSA's standard software packages. The Contractor shall provide one original in hardcopy form and three copies for each deliverable. The contractor shall maintain an electronic copy of each deliverable on a shared drive of the IC LAN that is accessible to the SSA Task Managers. This drive will contain a separate directory established as a repository for all deliverables.

Samples of current deliverables are available upon request.

#### **3.1 General Deliverables**

All task orders require the following deliverables:

##### **3.1.1 Weekly Action Tracking Reports**

The Contractor shall track all action items initiated by the SSA Task Manager. The Contractor shall provide a weekly report identifying the action items, the date the items were initiated by the SSA Task Manager, the target completion date and the actual implementation date, when applicable. The report shall group the action items by completion or pending. SSA will provide an action tracking system which enables separate reporting on each component.

### **3.1.2 Monthly Labor Summary Reports**

For each task order, the Contractor shall submit a separate Monthly Labor Summary Report that provides the hours worked for the month. The Contractor shall submit the report in spreadsheet format.

This report shall consist of three reports. The first report shall provide regular hours billed, and the second shall provide extended hours, if required by the Government. The two reports shall be provided in identical formats with workdays being shown as columns and personnel (in alphabetical order) as rows. The total hours for each column and row shall be totaled.

The third report shall show the distribution of each employee's hours among the varying areas. Monthly and cumulative year-to-date data shall be provided. The rows and columns shall be totaled. The Daily Time and Attendance Sheets for the month from the Sign-In/Sign-Out Log shall be attached.

The hours in the Monthly Labor Summary Report should be consistent with those in the Daily Time and Attendance Sheets and will be used to bill SSA for the contractor hours worked. The Contractor shall note and explain any discrepancies in the Monthly Labor Summary Report.

### **3.1.3 Sign-In/Sign-Out Logs**

The Contractor shall maintain an attendance log for each of the task orders. The Log shall consist of daily Time and Attendance Sheets. The Contractor personnel shall sign their names and time of arrival on duty in the Log, in the order of arrival.

Upon daily departure from duty, they shall annotate the time of departure, total hours worked, periods of absence, if any, and sign their initials. If extended hours are worked, an additional sign-in/out sheet should be completed. The Log shall be located in a place that is agreeable to the Contractor's Task Manager and the SSA Task Manager. The Contractor task personnel shall also sign out in the order of departures.

The Contractor's Task Manager shall certify the accuracy of these forms by signing the bottom of each day's sheet. The sheets shall be submitted as an attachment to the Monthly Labor Summary Report. The Contractor's Task Manager and the SSA Task Manager shall use the Log to verify the

Contractor hours worked at any time and also to verify hours billed to SSA in the Monthly Invoice.

**3.1.4 Monthly Status Reports**

The Contractor shall provide a Monthly Status Report for each calendar month (or partial month) under the task order. At a minimum, the report shall include the items listed below.

**a. Workloads**

- Significant activities by technical area.
- Service statistics (including telephone calls, walk-in customers, on-site customer support, equipment loans, disks scanned for viruses, product evaluations, requisitions prepared, Tip Sheets prepared and demonstrations conducted).
- Deliverables submitted to the SSA Task Manager.
- Outstanding deliverables.
- Deliverables due for the next reporting period.
- Outstanding service calls.
- Outstanding equipment loans.

**b. Staffing**

- Staff changes.
- Staff development.

**c. Issues**

- Significant problems encountered/resolved.
- Outstanding issues.
- Recommendations for improved service.

(Note: The SSA Task Manager may request the Contractor to provide additional items, as deemed necessary; e.g., items may be added following review of the Project Management Plan.)

The Contractor shall provide customer service statistics for the report month as well as cumulative year-to-date statistics. In addition, the Contractor shall provide comparative figures (monthly and cumulative) for the prior year. Where appropriate, subtotals shall be provided for the type of service and organizational components supported. The Contractor shall submit this report in spreadsheet format with appropriate graphical representations of the data.

**3.1.5 Weekly Meetings**

The Contractor's Task Manager shall provide a weekly oral briefing on the status of work to the SSA Task Manager or designated alternate and other SSA personnel deemed appropriate by the SSA Task Manager. These meetings may be cancelled or postponed by mutual agreement of the SSA Task Manager and the Contractor's Task Manager.

**3.1.6 Annual Report**

The Contractor shall prepare this report at the end of the base year and each option year. The report shall provide a summary of Contractor services during the year and include these sections:

- Executive Summary
- Major Accomplishments by Technical Area
- Major Improvements in Service and/or Operations
- Service Statistics
- Staffing and Staff Development
- Significant Resource Accretions/Deletions

Within 15 workdays following the close of the task order year unless there are no options exercised to extend services beyond the last day of the reporting period, in which case the deliverable shall be due on the last day of the reporting period.

**3.1.7 Action Tracking System (ATS) Modifications**

The Contractor shall routinely modify the ATS to improve the management of services and administration. The Contractor shall make initial modifications to the ATS in accordance with the approval of the SSA Task Manager(s). Subsequently, the Contractor's Task Manager, with approval or request from the SSA Task Manager(s), may initiate modifications. These modifications may include changes to programs, data entry screens, and report formats. The contractor shall also maintain and update software that may replace or enhance the current ATS system.

**3.1.8 Trend Analysis Report by Contract Year**

At the conclusion of each contract year, graphs with narratives shall be provided (similar to summarizing the Monthly Reports) which depict, at a minimum, the number of Reports of Contact (ROCS) by month, ROCS by Problem Category, ROCS by Deputy Commissioner, and recommendations.

**3.1.9 Task Order Close-Out Report**

Three weeks prior to the completion of each task order, the Contractor shall schedule a close-out meeting and provide the SSA Task Manager with a close-out report. This report shall document the attendees, task order accomplishments, lessons learned, work product and/or formal deliverables.

**3.2 Project Management Plan**

In order to ensure the highest quality project performance and compliance with the requirements of the task orders, the Contractor shall implement and maintain a project management approach. This approach shall plan, organize, staff and direct the Contractor's efforts for each task order during the life of the BPA.

The plan shall describe the Contractor's management approach for managing all facets of the performance under the terms of the BPA. The plan shall serve as the mechanism for measuring the Contractor's performance and for ensuring that services comply with the requirements of each task order.

The Project Management Plan is due one week after the Blanket Purchase Agreement is awarded.

The plan shall include any new understandings and/or direction resulting from the orientation. The Contractor shall also update the plan in accordance with the items below. Requests for updated plans from the SSA Task Manager shall be made in writing or verbally. The SSA Task Manager shall confirm verbal requests in writing within five workdays.

The Project Management Plan and updates shall consist of the six sections listed below (A-F). The minimal requirements for each section are listed.



**A. Project Management Section**

***a. Corporate Organization***

The Contractor shall provide a project management organizational chart that identifies all managerial positions by title and name of the individual. The Contractor shall clearly indicate the responsibilities and authorities of each manager by describing the amount of independence and access to corporate management, etc. Also, the Contractor shall state how the corporate organization shall contribute to, support and recognize the responsibilities and authorities of each manager and key person.

The Contractor shall describe the methods and lines of communication between corporate units, as they pertain to assuring access to, and timely support from corporate resources/staff relative to the needs of this task order. The description shall include the relationship and proposed interfaces to assure timely and effective communication between the project management organization and the Government. Specifically, the Contractor shall identify those managers with whom the SSA Task Manager can discuss issues pertinent to the performance of the task order.

The Contractor shall describe the Task Manager's independence and authority to manage this task order relative to technical issues/matters. The Contractor shall state the reasons for and method of the Task Manager's access to corporate officials. In addition, the Contractor shall describe the types and degree of corporate support that shall be available to the Task Manager for this task order. This description shall also explain corporate support in terms of location, flexibility, timeliness and availability to the Task Manager.

***b. Periodic Progress***

The Contractor shall describe how periodic progress will be monitored either through meetings, reports, or other means of communication.

***c. Personnel Security, Suitability  
Requirements, Systems Security and Government Building Access***

Security requirements are explained in **Addendum C**, Section 1.0, Personnel Security and System Access Requirements. The contractor shall describe its proposed plans for complying with the physical, system, and personnel security provisions of the task orders in accordance with SSA's security requirements.

**B. Workload Management Section**

At a minimum, the Contractor shall address the items listed below.

- A narrative description of the methodologies for assigning the work in each area.
- A narrative description of the methodologies for performing the work in each area.
- A narrative description of the methodologies for managing the work in each area.
- A work breakdown structure for each technical area identifying all tasks, subtasks and dependencies among them.
- A narrative description of the assumptions and constraints relative to the work to be performed in each technical area.

**C. Staffing Section**

The Contractor shall provide its proposed staffing procedures to meet technical requirements and staffing levels. At a minimum, the Contractor shall address the items listed below.

- The organizational structure for the task order that identifies these items: the supervisory and team leader positions; their responsibilities and authorities, and procedures for handling scheduled and unscheduled absences in these positions.
- The resource loading chart identifying by name, position, and labor category, personnel that shall support each technical area; the total hours to be worked in each technical area and a breakout of extended hours.

- A Skills Inventory Matrix providing the skills for each person proposed to support the task order.

**D. Training Section**

The Contractor's personnel shall keep pace with latest versions, updates and/or releases of desktop software being used by the SSA end-user community. Skill maintenance is crucial to providing SSA end-users with the most up-to-date information. Consequently, it is mandatory that the Contractor's personnel shall maintain the skills necessary to support SSA's evolving desktop environment.

However, all training of the Contractor's personnel shall be the responsibility of the Contractor. Consequently, the Contractor's training costs shall not be an allowable cost item under the task order. However, there is limited funding for travel to attend some technical forums and conferences related to services provided, as approved by the SSA Task Manager. The Government shall establish a budget line item to cover travel expenses incurred by the Contractor for these purposes.

This section shall include a description of the Contractor's training plan to ensure the continuity of skilled personnel on the contract. At a minimum, the Contractor's training plan shall address the items listed below.

- Procedures for maintaining the continuity of skills for the technical areas, according to the Skills Inventory Matrix.
- Procedures to ensure those personnel remain certified/qualified in their specialty technical area(s).

During the life of each task order, the Contractor shall report in the Monthly Status Report the efforts employed to train personnel.

**E. Quality Management Section**

The Contractor shall describe efforts to provide quality management to the project. At a minimum, the description shall include the items below.

- Methodologies to be used to ensure total involvement of all personnel toward achieving the purpose and objectives of the BPA.
- Methodologies to be used to ensure a commitment to the goal of quality customer service.
- Methodologies to be used to ensure a commitment to the goal of continuous improvement of support services.

**F. Quality Assurance/Quality Control Section**

SSA considers that the quality of Contractor deliverables and products is an ongoing responsibility of all key personnel. Consequently, the Contractor shall ensure the technical quality (i.e.; accuracy, completeness and timeliness) of all deliverables, technical information and products.

At a minimum, the Contractor shall address the items below.

- Methods to be used to provide SSA with quality (i.e.; accurate, complete, timely, etc.) deliverables and products.
- Methods for building quality into products through planning and management.

**3.3 Deliverables Table**

Refer to the following Deliverables Table, which provides the title, frequency, acceptance criteria and due date of each deliverable:

Type	Deliverable No.	Deliverables Title	Frequency	Acceptance Criteria	Due Date
General	3.1.1	Weekly Action Tracking Report	Weekly	Acceptance by the SSA TM is required for this deliverable. As required, the Contractor shall submit revisions within 2 workdays from receipt of the request from the SSA TM.	To be provided and discussed at the Weekly Status Meeting.
General	3.1.2	Monthly Labor Summary Report	Monthly	Same as above.	Within 10 calendar days following the last calendar day of the month.
General	3.1.3	Sign-In/Sign-Out Log	Daily	Same as above.	To accompany the Monthly Labor Summary Report.
General	3.1.4	Monthly Status Report	Monthly	Same as above.	Within 5 workdays following the close of the calendar month.
General	3.1.5	Weekly Meetings (Oral Presentation)	Weekly	Not applicable.	As scheduled by the SSA TM.
General	3.1.6	Annual Report of Support Services	Annually	Acceptance by the SSA TM is required for this deliverable. As required, the Contractor shall submit revisions within 2 workdays from receipt of the request from the SSA TM.	Within 15 workdays following the close of the task order year OR the last day of the reporting period.
General	3.1.7	Action Tracking System (ATS) Modifications	As requested by the SSA TM.	Same as above.	Within 15 workdays of request.
General	3.1.8	Trend Analysis Report by Contract Year	Annually at the close of the each task order year.	Same as above.	Within 10 workdays following the close of the task order year OR the last day of the reporting period.
General	3.1.9	Task Order Close-Out Report	Once	Acceptance by the SSA TM is required for this deliverable.	15 workdays prior to completion of each task order.
General	3.2	Project Management Plan and Updates	Annually at the start of the each task order year or as requested by the SSA TM.	Acceptance by the SSA TM is required for this deliverable. All plans shall be submitted as final products. If modifications are required to the plan, the SSA TM shall submit the request(s) to the Contractor as a "request for modification".	Within 10 workdays of the BPA award; within 10 workdays of commencement of each year renewal; and within 10 workdays of receipt of request for modifications by the SSA TM.

#### **4.0 GOVERNMENT FURNISHED PROPERTY**

Government-furnished space and on-site facilities (i.e., printing, photocopying, etc.) will be made available for the contractor for all task orders.

The contractor staff will use Government telephones and equipment (desks, workstations, and printers) to provide on-site support to the SSA community.

## 5.0 PERFORMANCE REQUIREMENTS AND QUALITY ASSURANCE SURVEILLANCE PLAN MATRIX

This section describes what services the Government expects to be performed by the Contractor and to what standard. All work shall be performed within time limits specified. The Performance Requirements and Quality Assurance Surveillance Plan Matrix also details the method of surveillance the Government will use to ensure that the Contractor is meeting the performance requirements.

If performance exceeds the Quality Assurance Surveillance Plan Matrix, a positive performance rating will be given in procurement tools such as the National Institute of Health's Contractor Performance reports, other Government agency reference checks, etc. Conversely, if performance is less than the Quality Assurance Surveillance Plan Matrix, a negative performance rating will be given in procurement tools such as the National Institute of Health's Contractor Performance reports, other Government agency reference checks, etc.

*The following example defines the information contained in each column of the Performance Requirements and Quality Assurance Surveillance Plan Matrix below:*

### Example:

<b>Performance Requirement</b>	<b>Task Order Reference Number</b>	<b>Performance Indicator (Desired Outcome)</b>	<b>Performance Standard</b>	<b>Method of Surveillance</b>
<i>This column lists the overall performance requirements that must be met by the Contractor.</i>	<i>This column lists the Task Order Number and the paragraph number within the respective Task Order for which the performance requirement applies. For example, TO1-2.1.1 is Task Order 1 (Information Center)-paragraph 2.1.1. TO3-2.1.2 is Task Order 3 Entrepreneurial Services)-paragraph 2.1.2</i>	<i>This paragraph describes what the Contractor must accomplish in order to satisfy the overall requirement.</i>	<i>This column defines the criteria for successful performance by the Contractor.</i>	<i>This column states the surveillance methodology for each standard.</i>

## PERFORMANCE REQUIREMENTS AND QUALITY ASSURANCE SURVEILLANCE PLAN MATRIX

	Performance Requirement (Required Service)	Task Order Reference Number	Performance Indicator (Desired Outcome)	Performance Standard (Acceptable Quality Level)	Method of Surveillance
1.	The Contractor shall provide accurate technical support and problem resolution for SSA standard desktop software to the SSA community.	<p>TO1-2.1.1 TO1-2.1.2 TO1-2.1.3 TO1-2.1.4 TO2-2.1.2 TO2-2.1.3 TO3-2.1.1 TO3-2.1.2</p> <p>TO1-2.1.1 TO1-2.1.2 TO1-2.1.4 TO2-2.1.2 TO2-2.1.3 TO3-2.1.1 TO3-2.1.2 TO3-2.2.5 TO3-2.2.6</p> <p>TO1-2.1.1 TO2-2.1.4 TO2-2.1.5 TO3-2.1.1 TO3-2.2.6</p> <p>TO1-2.4.7 TO2-2.3.5</p>	<p>A Report of Contact (ROC) shall be entered into the Action Tracking System (ATS) when a request cannot be resolved immediately. The requests for assistance and problem resolution shall be tracked through completion through the respective ATS.</p> <p>Technical support shall include identifying, researching and resolving problems and questions pertinent to the use of the software. Technical questions and problems shall be thoroughly and accurately answered.</p> <p>Customers shall be assisted in selecting an appropriate Agency supported software package to design an application and to use the package.</p> <p>Short-term loans of equipment shall be provided to customers. Types of loaner equipment shall include laptops, portable printers, and scanners. Equipment hardware shall be in working order and hardware and all required software are installed configured properly.</p>	<p>100% of calls or visits not resolved within 10 minutes are entered as ROCs.</p> <p>99% of ROCs will have completion dates within 1 month of opening.</p> <p>No more than two valid complaints per month regarding unanswered questions or incorrect information.</p> <p>No more than two valid complaints per month regarding unanswered questions or incorrect information.</p> <p>100% of the time, equipment is available for pick-up by the customer at reserved time.</p> <p>98% of calls and customer survey forms are complaint-free during a 6-month period regarding broken equipment.</p>	<p>Planned sampling via Weekly Status Meetings and deliverables including, but not limited to, ATS reports, Monthly Reports, and Trend Analysis Reports.</p> <p>(Automated Customer Surveys are issued to customers after each ROC is closed. Once completed, the surveys are automatically sent to the Government and Contractor task managers. )</p> <p>Validated customer complaints via Customer Survey Forms, and customer feedback received. SSA Task Manager (TM) will investigate all complaints and will determine if complaint is valid. Valid complaints will be documented.</p> <p>Validated customer complaints via Customer Survey Forms received. SSA TM will investigate all complaints and will determine if complaint is valid. Valid complaints will be documented.</p> <p>Validated customer complaints via Customer Survey Forms received. SSA TM will investigate all complaints and will determine if complaint is valid. Valid complaints will be documented.</p>



	Performance Requirement (Required Service)	Task Order Reference Number	Performance Indicator (Desired Outcome)	Performance Standard (Acceptable Quality Level)	Method of Surveillance
2.	The Contractor shall assist customers in the installation and setup of hardware equipment and configure related software.	TO1-2.1.1 TO1-2.1.2 TO1-2.1.4 TO1-2.4.1 TO2-2.1.2 TO2-2.1.3 TO2-2.1.6	All hardware and software shall be properly installed and configured, as requested.	Hardware and software are installed and configured accurately and in a timely manner 98% of the time.  98% of calls and customer survey forms received per 6-month period are complaint free regarding improperly installed or configured equipment and software.  An analyst and not an automated telephone answering service answers 98% of calls.  Calls left on the automated telephone answering service shall be returned within 30 minutes during Task Order support hours.  Responses to requests received via fax or e-mail shall be made within 30 minutes during Task Order support hours 98% of the time.  98% of calls and customer survey forms received per 6-month period are complaint free regarding unanswered phone calls.	Validated customer complaints via Customer Survey Forms received. SSA TM will investigate all complaints and will determine if complaint is valid. Valid complaints will be documented.
3	The Contractor shall respond to all customer requests for assistance in an accurate, timely and courteous manner to ensure customer satisfaction. Requests shall be via walk-in, call-in, fax, or electronic mail.	All Task Orders	Customers requesting assistance shall be able to contact a support analyst almost immediately during Task Order support hours.	Unscheduled inspections.  Validated customer complaints via Customer Survey Forms; customer feedback. SSATM will investigate all complaints and will determine if complaint is valid. Valid complaints will be documented.	Unscheduled inspections.  Validated customer complaints via Customer Survey Forms; customer feedback. SSA TM will investigate all complaints and will determine if complaint is valid. Valid complaints will be documented.
		TO1- (General)	Walk-in customers shall be greeted in a timely and courteous manner and verified that they are entered in the Visitor's Log. The customers will be directed to the appropriate resource(s) and assisted in the use of the resource(s).	An analyst will be available to assist walk-in or call-in customers 99% of the time.  98% of calls and customer survey forms received per 6-month period are complaint free regarding discourteous or unavailable staff.	Unscheduled inspections.  Validated customer complaints via Customer Survey Forms; customer feedback. SSA TM will investigate all complaints and will determine if complaint is valid. Valid complaints will be documented.
		TO1- (General) TO3- (General)	If a support analyst cannot resolve a problem within the first 10 minutes and further research is necessary, or if the request must be directed to another analyst, a follow up call or visit with the customer will be made within 4 hours.	Follow-up calls are made within 4 hours 99% of the time during Task Order support hours.  <i>(If a call is received just prior to the end of the day, the 4-hour response time will begin the following</i>	Random Sampling via review of ATS records.  Unscheduled inspections.  Validated customer complaints via Customer Survey Forms

Performance Requirement (Required Service)		Task Order Reference Number	Performance Indicator (Desired Outcome)	Performance Standard (Acceptable Quality Level) ( <i>business day. These calls will be entered into the ATS and given priority the next business day.</i> )	Method of Surveillance
				<i>business day. These calls will be entered into the ATS and given priority the next business day.)</i>	received. SSA TM will investigate all complaints and will determine if complaint is valid. Valid complaints will be documented.
		TO2- (General)	Immediate response to walk-in or call-in requests shall be taken. Customers shall be greeted in a courteous manner. The Contractor shall respond within 1 hour for OC, and 2 hours for ODCS, OCIO, and OCSO.	An analyst will be available to assist walk-in or call-in customers 99% of the time.  Follow-up calls are made within the task orders' specified times for response 99% of the time.  99% of calls and customer survey forms received per 6-month period are complaint free regarding discourteous or unavailable staff.	Random Sampling via review of ATS records.  Unscheduled inspections.  Validated customer complaints. SSA TM will investigate all complaints and will determine if complaint is valid. Valid complaints will be documented.
		All Task Orders	Assistance to the end-user(s) at their workplace is required when direct contact with the customer or equipment is necessary.	An analyst will provide on-site assistance to the end-user's workplace within 4 hours for IC and ESS customers, 2 hours for CIO, ODCS, and OCSO, and 1 hour for OC.  An analyst will provide on-site assistance to the end-user's workplace within 1 hour for OC, OCIO and ODCS customers.  99% of on-site visits by the Contractor are arranged in advance with the customer.	Random Sampling via review of ATS records.  Validated customer complaints via Customer Survey Forms; investigate all complaints and will determine if complaint is valid. Valid complaints will be documented.
		All Task Orders	Advance arrangements shall be made with the customer for on-site support. If support is required at an outlying building, Government shuttle service is available to the site.	99% of on-site visits by the Contractor are arranged in advance with the customer.	Validated customer complaints via Customer Survey Forms; investigate all complaints and will determine if complaint is valid. Valid complaints will be documented.
		TO1- (General) TO3- (General) TO3- (General)	Customer will be notified when his/her request for services has either been closed or requires additional time to resolve.	Follow-up calls are made to the customer at least once every 2 days until request is resolved.	Random Sampling via review of ATS records.  Validated customer complaints via Customer Survey Forms received. SSA TM will investigate all complaints and will determine if complaint is valid.

Performance Requirement (Required Service)	Task Order Reference Number	Performance Indicator (Desired Outcome)	Performance Standard (Acceptable Quality Level)	Method of Surveillance
				Valid complaints will be documented.
	TO1- (General) TO3- (General)	Customer surveys will be issued to the customer after each problem has been resolved.	Customer Survey Forms are issued to customers automatically when ROC is closed.	Random Sampling via review of ATS records.
4. The Contractor shall maintain network and resolve problems on multiple and bridged LANs with Exchange and Windows 2000 Servers and workstations.	TO2-2.1.1 TO2-2.2.1 TO2-2.2.2	Problems with server performance are reported immediately to OTSO.	A ROC is entered into the appropriate Action Tracking Systems (ATS/CAPRS) when a technical problem arises outside of the realm of the Contractor's responsibility.	Planned Sampling via Customer Survey Forms.
	TO2-2.1.1 TO2-2.2.2	The Contractor shall maintain close and consistent communication with OTSO to gain status of network problems and to provide troubleshooting assistance when necessary.	A network analyst shall be available to assist OTSO in troubleshooting network problems until the problem is resolved.	Random Sampling via review of ATS records.
5. The Contractor shall configure and maintain Exchange servers.	TO2-2.1.1 TO2-2.2.1 TO2-2.2.2	Installation of server software, or upgrades to server software, shall be performed as necessary. If interruption in server performance is required to install any software, the installations shall be performed outside of peak hours.	There shall be no interruptions in network service during working hours unless a technical problem arises outside of the realm of the Contractor's responsibility, or for general server maintenance.	100% inspection via advanced notification to SSA TM that work will be performed outside of peak work hours.
	TO2-2.2.1 TO2-2.2.2	Installation of network hardware shall be performed outside of peak hours.	Servers shall be fully operational from 6 a.m. to 6 p.m. on business days.	100% inspection via advanced notification to SSA TM that work will be performed outside of peak work hours.
			There shall be no interruptions in network service during working hours unless a technical problem arises outside of the realm of the Contractor's responsibility, or for general server maintenance.	
			Servers shall be fully operational from 6 a.m. to 6 p.m. on business days.	
	TO2-2.1.1 TO2-2.2.1 TO2-2.2.2	Server shall be regularly monitored for optimum performance. The Contractor will troubleshoot and report server problems to OTSO.	There shall be no interruptions in network service during working hours unless a technical problem arises outside of the realm of the Contractor's responsibility, or if	100% inspection via advanced notification to SSA TM that work will be performed outside of peak work hours.

	Performance Requirement (Required Service)	Task Order Reference Number	Performance Indicator (Desired Outcome)	Performance Standard (Acceptable Quality Level)	Method of Surveillance
				general server maintenance is required.  Servers are fully operational by 6 a.m. on business days.	
		TO2-2.1.1 TO2-2.2.1 TO2-2.2.2	A ROC is entered into the appropriate Action Tracking System (ATS) if a problem is encountered. ROCs and CAPRS are monitored through resolution.  Exchange Global Address List (GAL) distribution lists are added, deleted, or changed as requested. The GAL will be monitored to ensure modifications are replicated timely by OTSO.	ROCs and CAPRS are entered within 1 hour of the time the problems are encountered.	Random Sampling via review of ATS records and weekly status meeting.
		TO2-2.2.1 TO2-2.2.2	Notification to OTSO is required if distribution list modifications are not replicated within 1 day.  Exchange mailbox accounts are created, exported, or deleted as personnel changes occur, and the GAL is monitored to ensure these changes have replicated to GAL sites.	Additions or modifications of distribution lists are made to the GAL within 4 working hours of request.  GAL distribution list additions are created in accordance with OTSO e-mail standards 99% of the time.	Random Sampling of the GAL for modifications made.
		TO2-2.2.1 TO2-2.2.2		Mailbox accounts are added or modified within 4 hours of request.  Mailbox accounts are created in accordance with OTSO e-mail standards 99% of the time.	Random Sampling of the GAL for modifications made.  Customer Feedback
		TO2-2.2.1 TO2-2.2.2 TO2-2.2.3	Shared folder permissions are assigned accurately and timely.  The latest version of SSA's standard anti-virus software is installed and running properly on all servers and workstations.	Permissions are granted or modified within 1 working hour of request.  Updated versions of anti-virus software are downloaded to all workstations within 1 week of receipt.  SMS anti-virus downloads are verified as running properly on all workstations within 1 week of receipt.	Customer satisfaction that permissions were granted.  Unscheduled inspections.  Customer Feedback
6.	The Contractor shall maintain virus detection and eradication programs.	TO2-2.2.3	Constant virus prevention measures are taken to ensure all workstations stay virus-free.	Immediate remedial action shall be taken to remove a virus that is detected on any workstation.	100% inspection via daily reports from Contractor.
		TO1-2.1.3	Alert notifications are issued for viruses and possible hoaxes to the SSA LAN coordinators (SLC) and Security Officers.	Notifications are sent within 1 hour of verification.	Customer Feedback 100% inspection via email notifications to SLCs.

Performance Requirement (Required Service)	Task Order Reference Number	Performance Indicator (Desired Outcome)	Performance Standard (Acceptable Quality Level)	Method of Surveillance
7. The Contractor shall conduct product evaluation.	TO1-2.1.3	End-user diskettes will be scanned in the IC prior to being used on IC workstations.	No more than one virus will be detected on any IC workstation within a 6-month period.	100% inspection via Monthly Status Reports.
	TO1-2.1.3 TO2-2.2.3	Assistance is given to customers to detect and remove viruses on their diskettes and workstations.	The Contractor is able to remove viruses from customers' diskettes and workstations 99% of the time.	100% inspection via Monthly Status Reports, ROC reports and weekly status meetings.
	TO1-2.3.1 TO1-2.3.2 TO1-2.3.3	Products shall be evaluated to address workstation and server requirements, functional characteristics, cost, support requirements, and business management considerations for use by customers and loaner equipment, and equipment for use by Contractor personnel to provide technical support, training and management of Contractor services and resources.	Contractor shall present a complete understanding of the product and provide sound advice to customers and Agency support personnel.  New products implemented shall be free of compatibility problems and shall be user friendly.	Planned Sampling via deliverables including, but not limited to, Annual Reports; Monthly Reports; Biweekly Highlight Report; Access Bi-monthly Newsletter;  Unscheduled Inspections.
	TO1-2.3.1 TO1-2.3.2 TO1-2.3.3	Software products and software upgrades shall be evaluated in advance of Agency implementation to assess the functional capabilities, compatibility, and potential impact on customers to prepare for assisting customers immediately following implementation.	Contractor shall present a complete understanding of the product and provide sound advice to customers and Agency support personnel.	Planned Sampling via deliverables including, but not limited to, Monthly Reports, Annual Reports, Biweekly Highlight Reports, and the Access Bi-monthly Newsletter.
	TO1-2.3.4	Acquisition of products and software that are required to operate the IC shall be prepared by the Contractor and submitted to the SSA TM for review and approval. The SSA TM will process the request for acquisition.	Acquisition requests shall be completed in accordance with Agency procedures and guidelines.	Unscheduled Inspections. 100% inspection by SSA TM.
8. The Contractor shall disseminate technical information to SSA customers.	TO1-2.2.1	Solutions to common end-user computing problems shall be compiled and brochures shall be published to address widespread or recurring problems. Hardcopies of these publications shall be displayed in the Information Center and made available free of charge to customers visiting the Information Center.	At least 6 brochures per year shall be published.  Technical information contained in the brochures will be 100% accurate.  The SSA TM shall conduct a review of the brochures in final format before publication. The SSA TM shall return the brochure to the Contractor no more than twice for	100% Inspection by SSA TM. TM will maintain documentation of all accepted and rejected deliverables.

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	TO1-2.2.1 TO1-2.2.2	Published information shall be distributed electronically to remote users and also published on the IC website on the SSA Intranet.	Electronic copies of published information will be sent to remote users and published on the IC website within 2 days of publication.	Unscheduled Inspections of website.
	TO1-2.2.4	The "ACCESS" newsletter will be written and published by the Contractor. Hard copies of this report shall be displayed in the Information Center and available free of charge to customers visiting the Information Center. The "ACCESS" newsletter shall be published on the IC Home Page on the Intranet. The "ACCESS" newsletter shall provide in-depth evaluations of products, short cuts and tips for using products more efficiently, and general interest information for customers.	The "ACCESS" newsletter will be free of typographical, content, and grammatical errors when published. The SSA TM shall conduct a review of the newsletter in final format before publication. The SSA TM shall return the newsletter to the Contractor no more than twice for correction of typographical, content, and/or grammatical errors. Technical information contained in the newsletter will be accurate 100% of the time.	Customer Survey Forms. 100% Inspection by SSA TM. TM will maintain documentation of all accepted and rejected deliverables.
	TO1-2.2.2	A website that provides current information on all available services in the IC shall be maintained on the SSA Intranet.	The "ACCESS" newsletter will be professional and orderly in appearance. The design of the website shall adhere to SSA Intranet standards and guidelines. Technical information published on the website will be accurate 100% of the time.	Unscheduled Inspections of website. Customer Survey Forms.
	TO1-2.2.3	Briefings and demonstrations to the SSA community shall be planned, scheduled and conducted to communicate information about computing techniques, products and support.	At least three demonstrations per year will be conducted.	Planned Inspections via Weekly Status Meetings and review of deliverables including, but not limited to, the Bi-weekly Highlight Reports and Monthly Reports.
	TO1-2.2.5	The availability of the IC services shall be actively promoted to increase the use of the services and increase	Flyers shall be distributed and posted on Agency bulletin boards for marketing purposes. A new flyer	Unscheduled Inspections via deliverables including, but not limited to, Monthly Reports,

	Performance Requirement (Required Service)	Task Order Reference Number	Performance Indicator (Desired Outcome)	Performance Standard (Acceptable Quality Level)	Method of Surveillance
9.	The Contractor shall effectively administer and maintain operations and information on resources and services of the Information Center.		the number of end-users. Examples of promotional techniques include presentations, circulars, IC business cards and promotional materials.	shall be posted every 6 months. Flyers shall be posted on at least one bulletin board in each of the Baltimore and Washington buildings. At least one visit per quarter will be made.	Weekly Status Meetings, and Contractor's Project Management Plans.
		TO1-2.2.3	Periodic on-site visits to outlying buildings shall be made to inform employees of services available to them by the IC and ESS. Display tables will be set up and brochures available to employees to promote familiarity of the IC.		Planned Inspections via Weekly Status Meetings and deliverables including, but not limited to, Bi-weekly Highlight Reports and Monthly Reports.
		TO1-2.2.5	Agency interactive video training (IVT) commercials on computing techniques shall be produced.	At least one commercial per year shall be made.	Planned Inspections via Weekly Status Meetings and deliverables including, but not limited to, Bi-weekly Highlight Reports and Monthly Reports.
		TO1-2.4.1	IC facilities shall be operated in a safe and secure manner and adhere to SSA's safety standards and guidelines.	SSA's Office of Facilities Management shall document no more than two safety violations during safety inspections. Violations will be corrected within 1 week of citation.	Planned Inspections via annual safety inspections by SSA's Office of Facilities Management. SSA TM's review of Safety Reports.
		TO1-2.4.1 TO1-2.4.8	The work area shall be maintained in a professional and orderly environment that is inviting and conducive to the business of the Information Center.	No more than one complaint per 6-month period regarding the aesthetics or the physical orderliness of the IC.	Unscheduled Inspections of facility. Validated customer complaints via Customer Survey Forms received. SSA TM will investigate all complaints and will determine if complaint is valid. Valid complaints will be documented.
		TO1-2.4.1 TO1-2.4.2 TO1-2.4.3 TO2-2.4.4 TO1-2.4.8	The operation of all IC facility equipment shall be properly maintained. Workstations are in working order and the latest version of SSA standard desktop software is installed and properly configured on each. However, the IC may provide workstations with various configurations and software versions such as Office 97/XP/2000, and/or	98% of all workstations are available for use by IC customers at all times. Software on available workstations is running properly 98% of the time. Software upgrades are installed properly on the appropriate workstations within 1 week of receipt.	Unscheduled Inspections. Validated customer complaints via Customer Survey Forms received. SSA TM will investigate all complaints and will determine if complaint is valid. Valid complaints will be documented.

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			Windows 2000/ NT to accommodate the varied SSA user community as it transitions between desktop environments.	98% of printers and scanners are available for use by IC customers at all times.	
		TO1-2.4.8	Hardware and software for the IC Demonstration Area shall be maintained.	No more than one valid customer complaint per month regarding improperly maintained equipment. 98% of all workstations are available for use by IC customers at all times. Software on the workstations is running properly 98% of the time on available workstations. Software upgrades are installed properly on the appropriate workstations within 1 week of receipt.	Unscheduled Inspections. Validated customer complaints via Customer Survey Forms received. SSA TM will investigate all complaints and will determine if complaint is valid. Valid complaints will be documented.
		TO1-2.4.8	A reservation system for the IC Demonstration Area shall be maintained.	No more than one customer complaint per month regarding improperly maintained equipment. Demonstration area is available to customers at reserved time. No more than one reservation conflict per year will be encountered.	Validated customer complaints via Customer Survey Forms received. SSA TM will investigate all complaints and will determine if complaint is valid. Valid complaints will be documented.
		TO1-2.4.8	Assistance is given to end-users in planning and conducting demonstrations in the IC Demonstration Area.	98% of comments from customer survey forms shall be free of complaints regarding assistance in the Demonstration Area.	Validated customer complaints via Customer Survey Forms received. SSA TM will investigate all complaints and will determine if complaint is valid. Valid complaints will be documented.
		TO2-2.2.1	Data backups of servers shall be conducted daily and, if necessary, recovery of data is performed.	The server data shall be backed up daily 100% of the time. Data shall be recovered immediately upon discovery of backup failure due to equipment malfunction.	Customer Feedback



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			Arrangements for equipment repair or replacement are made immediately.	
	TO1-2.4.1	The IC facility will be secured by locking all doors during all non-business hours and changing access codes routinely.	Notification to SSA TM and PM is made when a daily backup fails. No unauthorized entrance to the IC facility during non-working hours 100% of the time.	Unscheduled Inspections.
	TO1-2.4.2 TO2-2.3.1 TO2-2.3.2 TO2-2.3.3 TO2-2.3.4	An accurate and current inventory of hardware, software and other technical resources used by the Contractor will be maintained. Updates to the inventory will be made immediately upon receipt or removal of resources.	No more than two valid discrepancies shall exist per quarterly report.	Planned Sampling via review of Quarterly Inventory Resources report. Unscheduled Inspections.
	TO1-2.4.3 TO1-2.4.4 TO2- (General) TO3 (General)	The software for the Action Tracking Systems (ATS) shall be maintained, including the development of additional modules as required. The ATS applications shall be installed on workstations belonging to the SSA TM, and staff acting on behalf of the SSA TM, with full and unlimited access to the data.	Software shall be operational 99% of the time. Newly developed software modules shall not adversely affect system performance. New releases of software must maintain previously provided functionality, while providing enhanced capabilities. Updates of the software shall be installed on SSA TM's workstation within 1 week of implementation.	Unscheduled Inspections via SSA TM's usage of the software; Planned inspections via Weekly Status Meeting.
	TO1-2.4.6 TO3-2.3.2	Contractor shall keep abreast of and implement current help desk trends and techniques in order to provide SSA with the most cost-effective and high quality service to SSA desktop users.	Contractor attends help desk seminars, conducts ongoing research into help desk trends, and/or belongs to professional help desk associations	Planned Inspections via Contractor's Project Management Plans, Weekly Status Meetings, and Bi-weekly Highlight Reports.
	TO1-2.4.7 TO2-2.3.5	An inventory of equipment for short-term loans to customers shall be maintained. A loaner pool program, which includes a reservation system,	No more than one valid complaint per year that loaner equipment was not in working order upon pick-up.	Customer Feedback; Customer Survey Forms. SSA TM will investigate all complaints and will determine if complaint is valid.

	Performance Requirement (Required Service)	Task Order Reference Number	Performance Indicator (Desired Outcome)	Performance Standard (Acceptable Quality Level)	Method of Surveillance
			shall be maintained. Reserved equipment will be provided on time and follow-ups made on overdue loans.	No more than one valid complaint per year that equipment was not available at reserved time.	Valid complaints will be documented.  Planned Inspections via Monthly Reports and Weekly Status Meetings.
10.	The contractor shall provide administrative deliverables.	All Task Orders Refer to PWS Section 3.3, Deliverables Table TO1-2.6.1 TO1-2.6.2 TO1-2.6.3 TO1-2.6.4 TO1-3.0	Deliverables shall be prepared and submitted timely to the SSA TM in accordance with the Deliverables Table, above. Deliverables will be free of errors in grammar, spelling, content and statistical calculations.	The SSA TM shall conduct a review of each deliverable in final format. The deliverable shall be returned to the Contractor no more than one time for correction of typographical, grammatical and/or statistical errors.  Corrected, error-free, Deliverables shall be returned to the SSA TM no later than close of business on the following business day.	100% Inspection by SSA TM. SSA TM will maintain documentation of all accepted and rejected deliverables.
11.	The Contractor shall provide quality web-based support to SSA web designers.	TO3-2.1.1 TO3-2.1.2 TO3-2.2.3 TO3-2.2.4 TO3-2.2.5 TO3-2.2.6  TO3-2.2.1 TO3-2.2.2 TO3-2.2.3 TO3-2.2.4 TO3-2.2.5 TO3-2.2.6 TO3-2.3.2	Expert technical programming, design, development, and debugging assistance shall be provided to all SSA customers in a timely manner.  An Entrepreneurial website shall be developed and maintained providing information such as training resources, online technical references, development tool acquisitions, current tool versions, patch/upgrade information, and system requirements.	98% of calls per month are complaint free regarding unanswered questions or incorrect information.  The design of the website shall adhere to SSA Intranet standards and guidelines 100% of the time.  Technical information published on the website will be accurate 100% of the time.	Validated customer complaints via Customer Survey Forms received. SSA TM will investigate all complaints and will determine if complaint is valid. Valid complaints will be documented.  Unscheduled Inspections of website.  Validated customer complaints via Customer Survey Forms received. SSA TM will investigate all complaints and will determine if complaint is valid. Valid complaints will be documented.

### **HELPFUL HINTS:**

1. There are several references to key personnel and resumes. Remember that in a PBA, there should be very few resumes submitted (i.e., not every contractor employee is key), and the focus should be on results;
2. There are a number of references to and reports on number of hours worked for each contractor employee. There should be more emphasis on achieving results than tracking hours worked in a PBA. This tends to be labor-intensive and does not provide the agency with a clearer picture of results; and
3. There are a few references to staffing and staffing reports. In a PBA, it's up to the contractor to provide the right people, the right labor mix, and the right number of people. As long as he achieves results in each of the 3 principal task orders, the contractor employees involved are not something that needs to be tracked (unless you need a particular skill, like a Microsoft-certified engineer - you'd probably want to see proof of the certification).

The Step to PBA Team