Office of Personnel Management

Office of Chief Information Officer

OPM Retirement Services COBOL-Database Modernization

Performance Work Statement
for the
Legacy Code and Database Modernization and Cloud Rehosting

December 2024

Source Selection Information—See FAR 2.101 and 3.104

Table of Contents

Note that while, as a matter of policy, some agencies require the government to prepare the PWS, the guidance at FAR 37.602(a) stipulates that "a Performance work statement (PWS) may be prepared by the Government or result from a Statement of objectives (SOO) prepared by the Government where the offeror proposes the PWS."

Performance Work Statement (PWS)

for the

Legacy Code/Systems Modernization

1.0 General

1.1 Introduction

The mission of the Office of Personnel Management (OPM) is to lead Federal agencies in workforce policies, programs, and benefits in servicing Americans. The Office of the Chief Information Officer (OCIO) provides information technology (IT) services and strategic vision to deliver the best customer experience in all OPM IT operations, to support program offices while modernizing systems and strengthening data security, and to support OPM's priorities and cross-agency goals. Retirement Services (RS) is responsible for the Government-wide administration of retirement benefits and services for Federal employees, annuitants, and their survivors which allows so the potential and actual beneficiaries can respectively plan for retirement and have assurance in service delivery post-retirement.

OPM, like many government agencies, grapples with legacy Mainframe systems in operation for decades, hosting critical business logic and data. While reliable, these systems have become costly to maintain and challenging to integrate with modern technologies. This acquisition seeks to modernize the underlying legacy code for these systems, data stores, other support infrastructure and rehost these high value assets (HVAs), and more than 80 legacy applications to OPM's Microsoft Azure Cloud with the goal of improving agency's delivery of retirement benefit services.

1.2 Objective

OPM-OCIO, and -RS need IT vendor services to modernize retirement benefits and financial systems and applications written in legacy programming languages on the IBM Mainframe. These languages are mainly COBOL (Batch and CICS), JCL, and NATURAL and to limited varying degrees FORTRAN, Assembler, SAS, and others. Additionally, the agency must also modernize legacy database management systems (DBMS) including VSAM files, ADABAS, and DB2.

The objectives are to:

- Modernize legacy OPM retirement benefits and financial systems and applications currently on the IBM Mainframe platform using Artificial Intelligence (AI) methods and tools.
- Convert retirement benefits and financial systems and applications to a modern programming language(s).
- Convert legacy databases to a viable Microsoft Azure SQL DBMS option on OPM Azure cloud instance.

- Modernize and re-integrate other legacy infrastructure support components such as internal and external connectivity and print services and rehost in OPM's Microsoft Azure cloud.
- Eliminate and decommission the on-premises Mainframe hardware and support systems and many third-party mainframe products and replace them with Azure native services.
- Provide enhanced cybersecurity protections within OPM Azure Cloud to safeguard systems, applications, and data.

1.3 Scope of Work

The selected vendor will provide professional IT services to assess and understand the complex architectural design, interfaces, connectivity, and components of the current legacy environment with the expressed purpose of modernizing and rehosting them. The vendor will manage and optimize the refactoring and conversion of the legacy retirement benefits and financial systems and applications written in legacy programming languages on the IBM Mainframe to a modern programming language(s) such as Java, Python, and C# using AI methods and tools. The services provided will also involve the re-architecture and re-engineering of the current DBMS and conversion to modern DBMS in OPM Azure cloud environment. These services are expected to include but are not limited to legacy code conversion to a modern programming language(s), project management, system analysis, design and integration, technical writing gand documentation, Cloud engineering and migration, database management, various forms of testing, and cybersecurity.

1.4 Background

The Office of Personnel Management (OPM) Retirement Services (RS) is responsible for the Government-wide administration of retirement benefits and services for Federal employees, annuitants, and their survivors. These benefits and services offer employees the opportunity to plan for their retirement and to know that their retirement systems are efficiently and effectively managed. RS also strives to provide timely and responsive services and information to the annuitants and their survivors whenever needed.

To improve upon providing these services, OPM OCIO and RS require large scale analysis and a rewrite of its many legacy systems, applications, and programs currently on the IBM Mainframe consisting of estimated 2,220 programs, and 3.5 million lines of code (LoC) and their underlying data stores. It plans to rewrite this legacy code from two main languages: COBOL (Batch and CICS) and NATURAL and others such as JCL, FORTRAN, Assembler, and SAS to modern programming language(s) using Artificial Intelligence (AI) methods and tools. The agency is also seeking to modernize legacy database management systems (DBMS) including VSAM files, ADABAS, and DB2 and other support infrastructure components such as internal and external connectivity and print services and rehost in OPM Microsoft Azure cloud.

1.5 Type of Contract Contemplated

The contract type appropriate for this acquisition is Time and Materials. Given the innovative nature of the legacy code modernization and the desire by the Government for

the prospective vendors to use AI tools and methods for the legacy code conversion, it is not possible to accurately estimate the extent or/and duration of the work. It is also not possible at this state to accurately estimate costs that will be required to do the work.

1.6 Period of Performance

The period of performance of this contract consists of a base year and one option year (with a possibility of another option year) beginning on October 1, 2025. Period of performance will start from the date of award. Government anticipates up to 90-120 days for onboarding.

1.7 Place of Performance

Depending on the policy of the Office of Management and Budget (OMB), the place of performance could be onsite at OPM location, 1900 E Street, NW, Washington, DC 20415-1000 or remote or hybrid of both. If remote, OPM Mainframe platform and systems and Azure Cloud services are both accessible remotely. It is possible that resources of a selected vendor may need to travel to OPM Production data center at Boyers, PA and Disaster Recovery data center at Macon GA or other third-party AI partner sites. In any of these cases, Government will reimburse the vendor with travel costs.

1.1. Applicable Documents

1.1. Executive Order (EO) 14110: Executive Order on the Safe, Secure, and Trustworthy Development and Use of Artificial Intelligence, October 30, 2023
1.2. Executive Order (EO) 13960: Promoting the Use of Trustworthy Artificial Intelligence in the Federal Government, December 3, 2020
1.3. NIST Special Publication 800-218: Secure Software Development Framework (SSDF) Version 1.1: Recommendations for Mitigating the Risk of Software Vulnerabilities
1.4. NIST SP 800-160v1r1: Engineering Trustworthy Secure Systems, November 2022
1.5 OPM Azure Handbook, updated October 2024

2.0 Specific Requirements/Tasks

2.1 Task 1: Delivery Management

The Contractor shall provide product delivery management, project management, and Scrum Master Services to ensure the Agile team is able to deliver for OPM based on business, functional, and technical requirements for the Retirement Services Legacy code refactoring and modernization to a modern programming language(s) and modernize and convert the data stores. This support will specifically keep the team on track as they complete the various modernization effort, conversions, integrations and backlog items, work with OPM IT and program office staff members, and interact with other partners in other agencies and industry. This is to ensure that the team can design,

architect, configure, modernize, and implement retirement benefits systems leveraging an agile, continuous improvement/continuous design (CI/CD) methodology.

The Contractor shall collaborate with the system owners, key OPM stakeholders, and external agency representatives to manage and deliver program initiatives. The Contractor shall conduct knowledge transfer, strategy, architecture and design, code and system analysis, and system integration activities as part of this implementation effort as deemed necessary for efficient implementation.

2.1.1. Work with the Government project manager(s), product manager, and contracting officer representative (COR) to ensure that deliverables are fulfilled, managing team performance, and managing agreed-upon schedules.
2.1.2. Provide a detailed project plan, which includes the timeline, resources, deliverables, and risks of the modernization project.
2.1.3. Provide a comprehensive analysis and design document, including test plans and quality assurance plans as well as the initial completed code conversions to government project team to refine the requirements.
2.1.4. Collaborate with program office and IT stakeholders to modernize retirement benefits and financial systems and applications which are desirable, feasible, viable, and sustainable to meet customer needs over the product lifecycle.
2.1.5. Collaborate with various stakeholders to identify and define customer needs, understand the solution context, and develop the program vision, roadmap, and critical features required to meet the requirements of the systems and applications at their modernized state.
2.1.6. Document the operational and development value streams associated with RS and annuitant/external user specific processes.
2.1.7. Ensure the modernized retirement benefits systems and applications meet the current needs of program offices and external users while being flexible, adjustable, and adaptable as needs and requirements evolve based on feedback from stakeholders and users.
2.1.8. Keep the team organized, on track, and focused on the proper research, development, and refactoring of the retirement benefits systems and applications in conjunction with program office and OCIO stakeholders.
2.1.9. Employ Agile methodologies including Scaled Agile Framework (SAFe), Scrum, Kanban, and Lean Agile principles to deliver enterprise-class, customer facing solutions under tight timelines leveraging lean concepts, iterative development, and through visualizing work.
2.1.10. Exhibit Lean Agile leadership and help team members embrace Agile values, adopting and applying Agile Principles, and implementing Agile practices.
2.1.11. Serve as a bridge between OPM stakeholders and the development/delivery team to ensure features are identified, documented, and prioritized with detailed acceptance criteria so they are clear on what must be delivered to meet the OPM requirements.
2.1.12. Proactively identify obstacles and protect the team from any undue distractions so the team can stay focused on delivering exceptional value to OPM and external users.

2.1.13. Build relationships and trust across OPM, external partners, and across teams to build credibility and to influence decision as they must be made to meet timelines and milestones.
2.1.14. Facilitate all team meetings, including (but not limited to) the quarterly program increment (PI) planning sessions, daily stand-ups and scrums, team demo, and iteration retrospective, and quarterly program retrospectives.
2.1.15. Guide the team in relative estimation of user stories each iteration.
2.1.16. Keep the team focused on quarterly and daily and iteration goals to include achieving results, quality, flow, and velocity.
2.1.17. Ensure Contractor team follows standards for code development, automated testing and build procedures leveraging the OPM development, security, and operations (DevSecOps) Pipeline policies and procedures.
2.1.18. Ensure value is released in a timely manner and that key milestone dates are met.
2.1.19. Identify delivery and/or operational risks associated with the legacy code conversion, including risk identification, analysis, severity, likelihood, and recommended mitigation strategies.
2.1.20. Coordinate with OPM OCIO governance bodies (e.g., Executive Steering Committee, Enterprise Change Management (ECM), Architecture Review Board (ARB), Security Assessments etc.) to present recommendations and secure appropriate approvals from the Government.
2.1.21. Manage Contractor personnel to fulfill tasks and deliverables on schedule and within specified performance standards as agreed upon with the COR and OCIO leadership team.
2.1.22. Facilitate coordination and transitions amongst various tasks and corresponding personnel throughout the contract period of performance.

2.2 Task 2: Legacy Code Modernization, Refactoring, and Conversion

The contractor shall employ modern application development techniques such as AI methods to refactor and convert legacy code to a modern programming language(s). The actual code conversion process will be broken into two phases to allow for checks and validation. The first phase of code development work will include converting the designated COBOL (Batch and CICS) and other legacy code to modern programming language(s) using AI methods and validated through testing, integrating the new code with the existing systems, testing the functionality, performance, security, and compatibility of the code. The vendor will also demonstrate and use their process for fixing defects, errors, and bugs in the code.

When the vendor demonstrates the successes of the initial conversion, the remaining code will also be converted through the same processes.

The final phase will be the deployment into production, acceptance phase, including training, support, and maintenance on the converted code.

2.2.1. Assess and validate the current legacy environment including its architecture and design, code, data stores, and product components to better understand its complexity.
2.2.2. Analyze COBOL, JCL, NATURAL and Assembler-based systems, and applications for modernization purposes.

2.2.3. Implement Application Programming (API) layers to enable interoperability with other internal and external systems, including cloud-based and distributed platforms.

2.2.4. Refactor monolithic applications where feasible to support modularity and scalability.

2.2.5. Convert mission critical retirement benefits and financial systems on the Mainframe running on legacy code such as COBOL (Batch and CICS), NATURAL, and others using AI methods to modern programming languages (e.g. Java, C#, and Python).

2.2.6. Assess for viability and select and configure AI tools for accurate COBOL-to-modern language translation.

2.2.7. Automate the conversion process for efficiency, mapping COBOL (Batch and CICS), NATURAL, and other legacy code constructs to equivalent modern structures.

2.2.8. Implement custom tuning to preserve complex business logic and performance standards.

2.2.9. Produce application design documents, architecture design diagrams, and new API documentation.

2.2.10. Perform side-by-side validation of original and converted code to ensure functionality and performance alignment.

2.2.11. Create and produce other documentation which shows language-specific differences and maintenance best practices.

2.2.12. Conduct knowledge transfer and training sessions for developers on maintaining and extending the modernized systems and applications.

2.3 Task 3: Modernize and Refactor Legacy Data Stores

The contractor shall convert the legacy data stores on the Mainframe running on VSAM. ADABAS, and DB2 DBMS to Azure SQL native DBMS on OPM Azure cloud for system performance and easier data sharing across systems and applications. This support will allow OPM to leverage modern DBMS for converted applications as well as consolidate current myriad of DBMS to a single product for efficiency and cost savings implications.

2.3.1. Convert legacy VSAM files to useful modern entity relational diagrams (ERD) and database schemas to support refactored and modernized applications.

2.3.2. Convert ADABAS and DB2 data stores and schemas to Azure SQL native options.

2.3.3. Configure and test data integration workflows for compatibility with modern analytics and reporting tools.

2.3.4. Perform data cleansing and relevant data migration using modern and automation tool(s) for extraction, transformation, and load (ETL) to ensure integrity, reliability, and performance of migrated data in its end state.

2.3.5. Develop API gateways or/and connectors for other OPM data sources and for external data access and connectivity.

2.3.6. Develop comprehensive documentation for database architecture and design and integration points.

2.4 Task 4: Testing and Quality Assurance

The contractor shall conduct various forms of testing of the code, integration, functionality, performance, databases, load, and other components during the code conversion phases. Testing is important to ensure that the end state of the modernized systems and applications align with the original business needs, meet, and surpass the functionality and performance requirements envisioned for them. The overarching objective is for all the modernized systems, applications, databases, APIs, connections, and other support functions such as print services meet required performance, security, and reliability standards.

2.4.1. Develop and execute test plans and test cases which will address functionality, integration, performance, user acceptance, and security, testing of the modernized systems and applications.
2.4.2. Perform end-to-end testing for converted modernized applications and databases, and new integrations.
2.4.3. Use automated testing frameworks where possible to streamline quality assurance.
2.4.4. Produce test results and performance benchmarks.
2.4.5. Document impediments, constraints, defects, and issues which were found, how they were resolved, and recommendations for further improvements.

2.5 Task 5: Cloud Migration/Integration, Optimization, and Mainframe Decommission

The contractor shall migrate and integrate the modernized code, databases, systems, and applications and supporting functions to OPM Microsoft Azure cloud environment. This will align with the OPM/OCIO strategic vision of migrating IT assets located on-premises to the cloud by leveraging its comprehensive set of cloud services and components to transform legacy systems into modern, scalable products and its native security components to protect those assets against cyber-attacks. The goal of this task is to ensure improved performance, maintainability, integration, and secure capabilities. Additionally, the contractor, after a period of optimized operations of all the modernized systems and applications in the target cloud location will collaborate with the Government to decommission OPM IT legacy assets on the Mainframe.

2.5.1. Leverage available OPM Azure environment infrastructure for development, code repository, testing, and deployment using approved continuous integration and continuous deployment (CI/CD) pipelines for product efficiency, quality, productivity, and security of the products.
2.5.2. Adhere to OPM/OCIO ECM process for cloud implementation and migration to assure that code and system changes which are being made can withstand the scrutiny of the auditors.
2.5.3. Develop cloud deployment plan which will implement the migration of the modernized code to production in stages, utilizing AI tools to monitor stability at each phase and automatically identify potential issues.
2.5.4. Migrate all functionality of the modernized code, systems and applications, and other supporting functions to OPM Azure environment.

2.5.5. Produce integrating cloud architecture documentation for systems and applications to be migrated.
2.5.6. Run the legacy mainframe environment in parallel with the modernized systems and applications to mitigate risks during transition, leveraging AI for real-time performance analysis and issue detection.
2.5.7. Develop a detailed cutover plan with AI-powered risk assessment tools to ensure that the final transition is executed smoothly, including timelines, roles, responsibilities, and rollback procedures.
2.5.8. Provide ongoing optimization and monitoring of the system with AI integrated throughout the process for CI/CD to ensure that the modernization effort delivers long-term value and operational excellence for OPM.
2.5.9. In collaboration with the OPM OCIO staff, take a comprehensive assessment of Mainframe hardware and software assets in preparation for decommissioning.
2.5.10. Team with the OPM OCIO staff to decommission the Mainframe after all the migrated and modernized workloads are fully functional over a period in OPM Azure PROD environment.

2.6 Task 6: Training, Documentation, and Knowledge Transfer

The contractor shall provide transfer of knowledge to the operations and maintenance (O&M) staff who will continue to support the systems and applications in their modernized state. This knowledge transfer task will take the form of training and documentation. The selected vendor will provide the O&M staff, many of whom are currently skilled in legacy code support, with training in the new modernized code, architecture, functionality, support and maintenance processes, and all necessary skills and techniques importance to provide sufficient support. Additionally, the outcome of this task is to produce documentation targeted for O&M support. These are in addition to the design and architecture diagrams and shall include but not limited to Concept of Operations (CONOPS), user guides, standard operation procedures (SOP), and others.

2.6.1. Conduct training sessions for the development, O&M, and security teams on new processes, tools, and technologies.
2.6.2. Produce training materials and recorded sessions for reference by different teams.
2.6.3. Create knowledge base repositories with FAQs and troubleshooting guides for quick issue resolution.
2.6.4. Provide ongoing support during the transition phase to address questions and facilitate knowledge transfer.
2.6.5. Create comprehensive documentation for new configurations, integrations, codebase details, and best practices.
2.6.6. Produce system documentation, including system and database design and architecture, process workflows, operations, and maintenance guides.

3.0 Contractor Quality Assurance.

OPM will use the following measures to assess the performance of the work by the contractor:

3.1. Quality: this measure will assess the extent to which the modernized code and databases meet the functionality, reliability, testing, performance, security, and usability requirements specified for the contract.
3.2. Technical compliance: this metric will measure the contractors' adherence to software development and modernization techniques to include but not limited to the use of SAFe methodology, AI methods, conversion to modern programming language(s), data management conversion and migration, and system integration.
3.3. Testing: will measure if the results of the converted code align to the test plan/cases and compare to the legacy code during the initial and subsequent phases.
3.4. Number of lines of code converted: This measures the amount of code successfully converted by AI without requiring developer correction versus the amount of code requiring a developer modification. It also measures in the second phase of the code conversion if the amount of legacy code converted without significant developer intervention is higher than the previous initial phase.
3.5. Error Tracking: This metric measures the accuracy in the vendor's tracking and fixing of defects, errors, and bugs in both phases of code conversion.
3.6. Timeliness: this will measure the prompt delivery of products within the assigned product increments and component sprints.
3.7. Documentation and transfer of knowledge: These will measure the usefulness of the documentation produced by the contractor for the modernized environment and its ability and competence to transfer knowledge to the O&M support team. 80 percent of current developers are trained in modern programming language and the cloud technology stack at full code conversion.

4.0 Delivery or Deliverables

Line Item #	Description	Delivery schedule *OR* Period of performance
001	**Task 1 – Delivery Management deliverables**	
001-01	**Quarterly Execution Plan or Program Increment (PI)** The Contractor shall facilitate Scaled Agile Framework (SAFe) quarterly program increment planning sessions that include business and technology stakeholders as well as representatives from the DevSecOps team, and any other pertinent stakeholders to effectively plan the work across an entire 12- week increment. This session will allow team members to understand business goals and commit to developing features that are most critical to OPM. The output of this exercise will include a groomed product backlog, a quarterly high-level plan with any important milestones, an inter- and/or intra-agency dependency map to help visualize and manage dependencies in real-time, and a risk register that outlines any known risks as well as their impacts,	Quarterly

	probability, and mitigations.	
001-02	**Code-Database Conversion Cloud Environment Migration Plan** The Contractor shall work within the OPM governance processes, including Architecture Review Board (ARB), ECM, and Cybersecurity requirements to develop and produce code conversion and database modernization plan in OPM Azure environment. The plan will show systematic approach process for architecting the cloud environment for which the refactoring of the legacy code and the databases will occur and for the deployment of tested and completed modernized code and databases from lower environments to the higher ones (i.e., from DEV to TEST to the STAGING to PROD). The plan must be reviewed and approved by OPM officials.	Initial Draft due 40 days after Delivery Manager / Senior Project Manager is onboarded and completed version after 60-days.
002	**Task 2: Legacy Code Modernization, Refactoring, and Conversion Deliverables**	
002-01	**Initial Code Conversion** The contractor shall complete the conversion of the designated initial application code using AI and automation tools and methods, integrate the modern code with the existing systems and applications, and demonstrate the functionality, performance, security, and compatibility of the modern code compared to the legacy COBOL (Batch and CICS) and NATURAL code.	Base year of the contract.
002-02	**Full Code Conversion** The contractor shall complete the refactoring of the remaining 3.5M lines of code of the approximately 80 Applications and migrate to OPM Azure cloud environment. This will include completed migration plan and placement of the modern programming language code in production.	Option year 1 of the contract.
003	**Database Modernization Design and Architecture**	
003-01	**Initial Design and Implementation of Refactored Databases** The contractor shall design and architect the database structures for the legacy systems and applications to be modernized and develop a plan that will convert the legacy DBMS to Azure SQL cloud DBMS. This deliverable shall include data migration plan.	Base year of the contract.
003-02	**Full Implementation of Refactored Databases** The contractor shall migrate modernized refactored data sources and stores to the production instance in the cloud.	Option year 1 of the contract.
004	**Task 4: Testing and Quality Assurance**	

004-01	**Initial Testing and Quality Assurance of Modernized Code and Data** The contractor shall fix and document the defects, errors, and bugs discovered in the converted code at the initial phase.	Base year of the contract.
004-02	**Testing and Quality Assurance of Fully Migrated Code and Data** The contractor shall conduct and complete various forms of the full refactored code, systems and applications and underlying refactored databases including migration, UAT, end-to-end, and interconnectivity tests.	Option year 1 of the contract.
005	**Task 5: Cloud Migration/Integration, Post Migration Optimization, and Mainframe Decommission**	
005-01	**Cloud Migration/Integration** The contractor shall develop a comprehensive cloud migration plan for the modernized code and implementation which shows elements of staggered and incremental deployments, parallel runs of Cloud and Mainframe environments, and cutover plans.	Option year 1 of the contract
005-02	**Post-Migration Optimization and Implementation Plan** The contractor shall develop and implement post-migration optimization plan.	Possible option year 2 of the contract
005-03	**Mainframe Decommissioning Plan and Implementation** The contractor shall develop a plan and implement the decommissioning of the Mainframe platform and infrastructure after the period of parallel and optimization has lapsed.	Possible option year 2 of the contract
006	**Task 6: Training and Documentation**	
006-01	The contractor shall provide staff training on the new code and database technology stack after the initial refactoring effort.	Base year of the contract.
006-02	The contractor shall document the new code after the initial refactoring.	Base year of the contract.
006-03	The contractor shall provide comprehensive training, support, and maintenance of the fully refactored modern code, database in PROD environment.	Option year 1 of the contract and possible option year 2 of the contract
006-04	The contractor shall develop and produce training materials and recorded sessions, knowledge base repositories with FAQs and troubleshooting guides, and other documentation for configurations, integrations, codebase details, and best practices, system and database design and architecture, process workflows, operations, and maintenance guides.	Option year 1 of the contract and possible option year 2 of the contract

006-05	In collaboration with the OPM officials, the contractor shall develop and produce case study analysis of the project, including lessons learned, recommended best practices, to be shared with the Federal CIO Council and any interested agencies.	Possible option year 2 of the contract

Notice to contractors:

All information and data related to this project that the contractor gathers or obtains shall be both protected from unauthorized release and considered the property of the government. The contracting officer will be the sole authorized official to release verbally or in writing, any data, the draft deliverables, the final deliverables, or any other written or printed materials pertaining to this contract. Press releases, marketing material, or any other printed or electronic documentation related to this project, must not be publicized without the written approval of the contracting officer.]

5.0 Meetings

For all meetings, the contractor shall be responsible for providing meeting materials, and administrative and facilitation support. Depending on OMB policy, meetings will be conducted at either OPM location, 1900 E Street, NW, Washington, DC 20415-1000 or through an alternative method of communication such as Microsoft Teams video conferencing, as approved by the Contracting Officer (CO).

5.1 Post-award Kickoff Meeting

Within seven (7) business days of contract award, the Government will conduct a post-award kickoff meeting at either OPM location, 1900 E Street, NW, Washington, DC 20415-1000 or through an alternative method of communication such as Microsoft Teams video conferencing (specific date and time to be mutually agreed-upon).

5.2 Intermittent Project Status Reviews

At the sole discretion of the Government, intermittent weekly project status reviews may be conducted on an informal basis in person at either OPM location, 1900 E Street, NW, Washington, DC 20415-1000 or through an alternative method of communication such as Microsoft Teams video conferencing as approved by the Program Manager.

5.3 Monthly Project Status Reviews

Monthly status meetings to be conducted on the last Wednesday of each month. The Contractor is responsible for reporting the previous month's activities (including any risks, issues, or concerns, and actual or recommended actions for their mitigation), and projected activities for the following month.

5.4 Program Management Review

The Government will conduct quarterly program management review with the Executive Steering Committee (ESC) at OPM location, 1900 E Street, NW, Washington, DC 20415-1000 or by Microsoft Teams, to review the progress of the program, identify any risks, issues, or concerns, and provide feedback on the Contractor's progress and performance. The Contractor shall provide written data and verbal presentations as to the financial status (projected vs. incurred costs) of the RS COBOL-Database Modernization initiative, any identified risks, issues, or concerns (and their mitigation or its plans for their mitigation.]

6.0 Required Travel and Other Direct Costs (ODCs)

No travel is anticipated for the performance of this contract. In rare occasions where travel may occur, for example, to OPM or third-party sites, OPM, with the approval of the assigned contracting officer representative (COR), will reimburse the vendor.

7.0 Special Instructions

OPM is expected to maintain or recompete or procure IT services to continue to provide operations and maintenance support of the modernized applications. The contractor shall be expected that sufficient knowledge transfer and documentation including design documents, SOPs, user manuals/guides, and others are provided to the successor contractor personnel.

8.0 Government Furnished Property/Equipment/Information

7.1. Each Contractor employee working under this contract will be provided with a GFE Laptop for their use in performance of the contracted work.

7.2. The Contractor staff will be given access to secure Government systems and data in performance of this contract.

9.0 Glossary of Abbreviations and Acronyms

Acronym	Meaning
AI	Artificial Intelligence
ARB	Architecture Review Board
CI/CD	Continuous Integration and Continuous Deployment
CICS	Customer Information Control System
CIO	Chief Information Officer
COBOL	Common Business Oriented Language
CO	Contracting Officer
COR	Contracting Officer Representative
DBMS	Database Management Systems
ECM	Enterprise Change Management

EO	Executive Order
ESC	Executive Steering Committee
ETL	Extraction, Transformation, and Load
FAQs	Frequently Asked Questions
GFE	Government Furnished Equipment
IT	Information Technology
JCL	Job Control Language
OCIO	Office of the Chief Information Officer
ODCs	Other Direct Costs
O&M	Operations and Maintenance
OPM	United States Office of Personnel Management
OMB	Office of Management and Budget
RS	Retirement Services
SAS	Statistical Analysis Software
SOP	Standard operating Procedures
UAT	User Acceptance Testing