**STATEMENT OF WORK**

**CONNECTIONS II**

**Order Identification Number: [#######]**

**Network Transition Support**

**(General Transition Requirements for**

**Telecommunications Services)**

**Issued by:**

**[Agency Logo]**

**[Name of Agency]**

**[Address of Agency]**

**DATE: [DD MM YYYY]**

|  |
| --- |
| **About this SOW Template**    This Statement of Work (SOW) Template has been provided by GSA to help customer Agencies contract for communications and networking solutions at the Local Area Network (LAN), building, campus, and enterprise level for the **Connections II contract**. The template is designed as a guide for developing a SOW and contains an example statement of work and requirements that can be readily tailored to meet Agency procurement needs.  At a minimum, the SOW must include the description and quantity of supplies and equipment to be delivered, the staffing needs to be provided, and support services to be performed as well as the evaluation criteria upon which the evaluation will be based.  Context boxes in this template contain informational material or instructions that should be deleted by the Agency when finalizing this document.   * **BLUE context boxes** such as this one contain informational material, no action required. * **YELLOW context boxes** contain instructions, or suggested requirement language/narratives and possible options the Agency may choose to include or discard when developing the SOW requirements. * **ORANGE Text** indicates placeholders where Agency provides a numeric value (e.g. n for number of days, or number of pages) or replaces text with its own Agency name, etc.   In most instances, a context box describes what requirements should be captured or included in a section; it may have a brief Q&A to guide the Agency in describing to the offeror the desired solution including products/equipment and staffing or support services the agency intends to obtain.  Sections of this SOW template may be deleted if they are not relevant to the SOW, and new sections may be added to meet the agency’s specific needs.  The text “***DRAFT SOW TEMPLATE”*** watermark and the references in the page footers should also be removed for the final copy.  REMOVE THIS PAGE WHEN FINAL DRAFT IS GENERATED |

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# Project Description

This is the [Agency] Statement of Work for the following task(s) utilizing the General Services Administration’s Connections II contract:

## Project Title

**Network Transition Support**

## Purpose

The purpose of this SOW is to provide requirements for the offeror to support the [Agency] transition of voice, data, and/or video and applies to all locations identified in this document. The statement of requirements defines assessment, planning, implementation and transition activities across the following high level task areas, and delineates the Offeror vs. Government roles and responsibilities.

The network transition to the new service will require execution and coordination of Offeror and [Agency] activities, to include:

* Project Management & Transition Planning Support
* Design and Engineering Support
* Installation, Testing and Acceptance for Enterprise-wide systems and/or site category (e.g., host, independent, or remote site)
* Installation, Testing Acceptance for site-specific, regional and/or small site category
* Record-keeping and documentation of transition activities
* Transition Deliverables

Section 2.0 identifies specific tasks that shall be required of the Offeror throughout the implementation and transition of services, from pre-planning to turnover or handoff. The intended role of the Agency is also described, although Agency participation may vary from site to site depending on factors such as the site location, size, implementation schedule, and resource availability.

## Background

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| To provide background information relevant to this SOW, this section should include at a minimum the following subsections. |

### Organization and Mission

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| This section is where the Agency provides a brief description of its organization and mission. |

[Add Agency-specific information here]

## Objectives

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| This section is where the Agency may provide additional justification and benefits of outsourcing the transition and installation of new telecommunications services.  The main objective is for the Agency to leverage industry-leading resources, apply transition best practices, and obtain the expertise and management capabilities of a Connections II contractor for a seamless, manageable, and timely transition of telecommunications services. |

The primary objective of this task order is to provide the best quality support services possible for a timely and trouble-free service installation and transition for all locations within the geographic scope of the transition program.

Transition-specific Objectives include:

1. Establish solid partnership with the Agency to meet the requirements
2. Detailed planning, engineering and project management support on transition
3. Phased network implementation based on size, complexity and requirements
4. Frequent Quality Reviews, and detailed Monitor & Control Plans with a Commitment to Excellence
5. Schedule for network transition based on Agency requirements for geographic scope
6. Thorough and detailed Communications and Reporting Plans providing up-to-date status throughout transition
7. Minimize cost of implementation
8. Accurate inventory will be made available in “real time” for all services to be transitioned

[Additional Agency-specific objectives can be inserted here]

## Scope

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| **Network Transition Support**  The scope of the Connections II Network Transition Support includes requirements for assisting the Agency in transitioning network services, systems and applications from the incumbent to the new service provider. The scope of work includes tasks and activities for the offeror to provide technical expertise, associated equipment and tools, and support services in managing the transition of services from one platform to another or from an old contract to a new contract.  Examples of project specific transitions applicable to the requirements in this SOW include:   * From an incumbent system to new consolidated system (e.g. an old helpdesk system to a new helpdesk platform) * From old telecommunications products and services to new products and services * From an old legacy technology to new services/technology (e.g. Analog/PBX Voice to IP-enabled Voice/VoIP)   The Connections II contractor performs the role of a systems integrator for an organized and well-coordinated transitioning of the Agency’s network services from the incumbent to the new service provider. The offeror will establish a transition team to support and manage the transition activities and perform the tasks required in this SOW. The offeror’s Transition Team will take the lead role in managing transition from pre-planning stage to the proper handoff of services for lifecycle management.  The scope may include requirements for the offeror to put together and review the Agency’s current inventory of services, systems, and equipment and to act as the Agency’s systems integrator to coordinate transition cutover, testing and acceptance, and the lifecycle management handoff or proper turnover of services and equipment from the incumbent to the new service provider.  **Transition Inventory** - A Transition Inventory is a complete description of the services, equipment, location data and environmental data necessary to facilitate the transition of an Agency’s services. The Transition Inventory is also required to support transition status tracking and reporting.  **OUT OF SCOPE**  **Submitting Transition Orders** - *Transition Orders* are orders for telecommunications services (e.g., dial tone, T1, satellite) that are intended to replace or augment existing telecommunications services that will be disconnected during the transition. Such orders can only be placed by an authorized Agency representative. However, the Agency may seek the assistance and expertise of the Connections II offeror for the analysis, review and validation of transition service orders (e.g. New orders and Disconnect orders). Validating transition orders for accuracy and completeness helps minimize transition delays, service disruptions, and unnecessary errors.  Unlike a routine service order, transition orders may contain information to facilitate transition; therefore, the Connections II offeror’s Transition Team has a significant role in this area to review, verify, and validate the transition orders placed by the Agency to ensure the information and data elements contained in the orders are correct and complete. |

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| This section should briefly describe the scope of transition requirements including transition planning and implementation activities, program management, and other logistics required to maintain a comprehensive, sound and reasonable approach to implementing a seamless transition to the new service or platform on schedule with minimal risk.  A brief summary of the scope of acquisition should also include required professional support services (labor types), associated equipment, software, and hardware components for transition support.  IMPORTANT REMINDER: If the Agency deletes a set of task(s) that do not apply to its SOW in Section 2.0 Statement of Work, then the Agency must also make the same deletion of the tasks identified in Section 9.3, Technical Evaluation Criteria. |

The scope of this SOW is to describe requirements for the offeror to bring together the right people (the offeror’s “Transition Team”), apply transition best practices, and utilize system tools necessary to support and manage a seamless transition for the [Agency’s telecommunication system]. Adequate staffing and appropriate labor categories shall be provided including transition project manager, telecommunications subject matter expert (SME), technical specialist, network engineers, and other labor categories necessary to support and assist the [Agency] transition project.

The [Agency] seeks assistance for transition that will incorporate lessons learned from previous transitions, and is seeking the support and knowledge of experienced offeror personnel and a proven transition methodology complete with risk management plans, including:

* The avoidance of service disruption and errors
* managing complex large scale implementations

### General Description of Requirements

The transition requirements will include service continuity and complete transition support as the [Agency] moves from the current platform and existing architecture to the new platform and architecture.

The requirements for transition will follow detailed transition planning that will be completed in a timely manner and being cognizant and responsive to the expiration schedule of the current contract(s) or other Agency schedules.

Section 2.0, Statement of Work, provides details of task requirements and the support services to be provided by the offeror including, but not limited to, the following:

1. Program Management and assessment of the Agency’s current network infrastructure, systems, and telephony applications
   1. Task 1: Assessment of Current Network Infrastructure and Systems
   2. Task 2: Transition Program Management and Operations
2. Core Transition-specific Tasks
   1. Task 3: Pre-installation (Staging)
   2. Task 4: Testing and Acceptance
   3. Task 5: Installation (Transition and Turn-up)
   4. Task 6: Cutover and Transition Methodology
3. Rollback Plan, Handoff, and Deliverables
   1. Task 7: Exit Transition (Rollback Plan)
   2. Task 8: Hand-off to Maintenance (Lifecycle Management)
   3. Task 9: Deliverables Requirements

. [Add Agency-specific information here]

### Existing Communications and Network Infrastructure

|  |
| --- |
| The Agency should describe briefly its service environment and other service elements that will be impacted with the transition effort.  The Agency may also add a logical architecture diagram or other configuration diagram of the existing Network systems configuration, site locations in terms of size and categorization (host, independent, and remote) useful for transition planning. The diagram can be included in Attachment H; an example diagram is provided in Attachment H. |

See ***Attachment H – Network Diagrams and Figures*** for a sample diagram.

[Add Agency-specific information here]

### Anticipated Limitations and Constraints

[Add Agency-specific information here for any anticipated limitations and constraints if applicable]

## Acquisition Selected

|  |
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| The order type for the Network Transition Support SOW defaults to **Time and Materials.**  The Agency has the option to specify a **Firm Fixed Price** (FFP) type task order.    A **FFP** task ordermay be appropriate if the Agency has a relatively straightforward transition to accomplish, where the extent of the work and materials and equipment involved are well understood. Agencies should be aware that FFP places more risk on the contractor, which will almost always result in higher prices as contractors seek to cover the cost of those risks. |

This is a ***Time and Materials*** Task Order against the GSA Connections II Indefinite-Delivery, Indefinite-Quantity (IDIQ) Contract.

The offeror shall adhere to the terms and conditions specified in the Connections II Contract in addition to the service specific requirements in this solicitation. This SOW also contains additional or supplemental requirements to those defined in the Connections II contract.

## Period of Performance

The Tasks agreed upon by [Agency] and the offeror will remain in effect for the life of the Connections II Task Order. The offeror shall provide technical support, and shall procure and install [or recommend] the equipment for these Tasks.

The term of the order will be from the date of award through a base period plus [n] option periods. The overall period of performance is specified in the following table.

**Table 1.7-1: Date of Task Order Award**

|  |  |  |
| --- | --- | --- |
|  | **Start Date** | **End Date** |
| Base Period | <<Performance\_Start\_Date>> | <<Performance\_End\_Date\_BasePeriod>> |
| Option Period 1 | <<Performance\_Start\_Date\_Option\_Period\_1>> | <<Performance\_End\_Date\_Option\_Period\_1>> |
| Option Period 2 | <<Performance\_Start\_Date\_Option\_Period\_2>> | <<Performance\_End\_Date\_Option\_Period\_2>> |
| Option Period 3 | <<Performance\_Start\_Date\_Option\_Period\_3>> | <<Performance\_End\_Date\_Option\_Period\_3>> |
| Option Period [n] | <<Performance\_Start\_Date\_Option\_Period\_[n]>> | <<Performance\_End\_Date\_Option\_Period\_[n]>> |

*Note: This table is for illustration purposes only. The Agency has the option to add or remove years in order to complete the Network Transition. The Connections II contract was awarded in October 2011. It ends January 19, 2021. An order placed before January 19, 2021 can last until January 19, 2026.*

## Place of Performance/Hours of Operation

The offeror shall comply with the geographic requirements specified in this solicitation to provide transition support for [Agency’s telecommunications service(s)].

The detailed description and location address of all Agency sites/facilities and office locations requiring transition support are provided in **Attachment B – Support Locations**.

|  |
| --- |
| **Appendix B** contains a column for hours of operation for each site. If all sites have common hours of operation or if hours of operation can otherwise be conveniently summarized (e.g., one set of hours for headquarters location, another of branch locations) then the Agency may choose to put that information here and delete the column in the Appendix. A full listing of all locations in two places, however, should be avoided. |

The offeror shall adhere to the hours of operation described herein. Any work performed after normal business hours will be allowed as necessary upon prior approval and coordination with the **[Agency]** Contracting Officer’s Representative (**COR)**.

## Fair Opportunity

This SOW will be released for Fair Opportunity under **FAR 16.505**.

## Regulatory Requirements and Compliance Guidelines

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| This is where the Agency should provide the general description of the compliance requirements and general policy and guidelines that the offeror must stipulate compliance with, provide acknowledgement of, or must complete to meet the requirements stated herein. |

The offeror shall review the following requirements and guidelines:

#### Regulatory Requirements

[Additional Agency-specific information can be inserted here if applicable]

#### Compliance Guidelines

[Additional Agency-specific information can be inserted here if applicable]

# Statement of Work

|  |
| --- |
| **Format and Structure of the Network Transition Support Requirements**  Section 2.0 contains the tasks and technical requirements for the support services (labor categories), associated equipment, and/or equipment services that the agency intends to obtain under this solicitation.  This section also identifies the general roles and responsibilities associated with each of the transition tasks. A table is provided to indicate which party will be responsible for performing the task. For the roles and responsibilities indicated in the column labeled “Offeror”, the offeror will be required to perform, provide support, and meet the requirements.   * **Roles and Responsibilities**   To highlight the task and transition activities required of the Connections II offeror, this section provides a table of roles and responsibilities to identify the party responsible for performing each task. Successful network implementation and transition involves solid partnership, coordination and cooperation of all the parties involved in the transition project. However, the SOW requirements will focus on the Offeror’s role with delineation on the Agency role to achieve a well-coordinated and seamless transition. The roles and responsibilities of each party is delineated and provided in detail in Tasks 4 and 6.   1. **OFFEROR.** The offeror (as the “Transition Team”) has the lead role to plan, implement, coordinate, and manage the transition program on behalf of the Agency. The offeror’s Transition Team performs specific roles and responsibilities for each task to meet and satisfy the requirements for transition. 2. **AGENCY.** The Agency reviews and approves the Transition Plan and acts as Liaison to the incumbent service provider. The Agency’s role is to approve and place all service orders. This includes transition service orders for new services, and associated equipment necessitated by the transition as well as Disconnect orders for the old services. Although the Agency is responsible for acquiring or selecting the new underlying services through another contract, the Agency may also task the offeror to assist and place cancellation and disconnect orders on behalf of the Agency during the network turn up phase of the transition. 3. **THIRD PARTY.** Third party contractors (e.g. the Incumbent and New service providers) will have the role and responsibility to be present during kickoff meetings, to review the Rollback Plan and to sign-off on agreed upon specific transitioning activities.    * The incumbent service provider role is to sign-off on exit agreements. The Agency must require the incumbent provider to sign off on all transition planning agreements including the transition procedures and Rollback Plan. To facilitate a smooth and seamless transition, the Agency must also require the Incumbent to cooperate and provide the required data for transition (e.g. List of Location identifiers [IDs]) to the new service provider.    * The New or incoming service provider role is to accept transition orders and provision the new services.   **Organization of the Statement of Work**  The Transition SOW Template provides suggested requirements for the offeror to create a Transition Team with the needed skills and expertise and any associated labor categories and equipment to assist and support the Agency in its effort to transition to a new service or platform.   * **Program Planning, Assessment and General Requirements -** The offeror provides support services (the Transition Team) to manage the transition program and act as system integrator to coordinate the Agency’s multi-vendor and third party resources involved in the transitioning of services from the incumbent to the new service provider. The offeror’s Transition Team takes the lead role in the assessment of existing network infrastructure and managing inventory of services to be transitioned and any associated equipment to be upgraded or replaced. * **Core Transition Requirements -** The offeror provides support services (the Transition Team) to perform transition support activities and take the lead role in the pre-installation transition planning, installation, acceptance and testing, and transition/turn up. * **Rollback Plan, Handoff, and Deliverables -** The offeror provides support services (the Transition Team) to coordinate with both the incumbent and the new service provider to obtain agreement and participation with the Agency approved Exit Transition Plan (Back-out / Fall-back). The Transition Team will also provide coordination during hand-off of newly transitioned service to the Service Maintenance group (Lifecycle Management). The offeror’s Transition Team will also manage and track transition deliverables and performance.   Depending upon Agency business needs, the size and complexity of the geographic coverage to be transitioned, the Agency may include agency-specific requirements in addition to the core transition requirements.  The requirements in this section are suggestive and it is up to the agency to determine the most suitable requirements to meet their goals and objectives, whether for a simple transition or complex multi phased transition project. |

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| IMPORTANT REMINDER: If the Agency deletes a set of task(s) that do not apply to its own SOW in Section 2.0 Statement of Work, then the Agency must also make deletion of the same tasks identified in Section 9.3, Technical Evaluation Criteria. |

This Statement of Work is composed of eight (8) main tasks with a set of transition-specific activities and requirements under each sub-task that the Offeror is expected to meet. Task 9 provides a summary of Transition Deliverables requirements.

The offeror shall provide the appropriate labor categories (skills and expertise), associated equipment, and equipment services to support agency-wide transition of [service(s) to be transitioned].

In addition to the support services requirements described under each task, the offeror shall be responsible for staffing a solid Transition Team with skills and expertise in managing transition activities including coordinating with the Agency’s incumbent and new service providers as well as performing the day to day operations and program management of the [Agency]’s transition activities. The offeror shall propose other labor categories as appropriate to meet the requirements.

**Task List**

The list describes the full range of offeror support services, associated equipment, and equipment services required for Managed Network Transition, including the performance measures to be used to assess the quality and timely delivery of the following tasks:

1. **Program Management and Initial Assessment**

Task 1: Assessment of Current Network Infrastructure and Systems

Task 2: Transition Program Management

1. **Core Transition Tasks**

Task 3: Pre-installation Planning (Staging Plan)

Task 4: Testing and Acceptance

Task 5: Installation (Transition and Turn up)

Task 6: Cutover and Transition Methodology

1. **Rollback Plan, Handoff, and Deliverables**

Task 7: Rollback Plan (Exit Transition)

Task 8: Hand-off to Maintenance (Lifecycle Management)

Task 9: Deliverables Requirements

## Task 1: Assessment of Current Network Infrastructure and Systems

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| This is where the Agency describes requirements for the offeror to perform full or partial assessment and inventory of the Agency’s existing network infrastructure and telecommunications systems. The Agency may require the offeror to focus only on the services to be transitioned or to perform a complete assessment of all telecommunication services in place. The offeror may also be required to research for additional information needed to plan and implement a seamless transition from the old to the new service and to anticipate limitations and constraints.  ***Section 2.1 – Task 1*** describes the requirements for conducting assessment and inventory of the Agency’s existing [service(s) to be transitioned] along with existing software, hardware, telephony subsystems, and other common or shared services. The offeror will also prepare a transition inventory report for each site location or service environment that will be impacted with the transition. |

The initial assessment and inventory analysis of the Agency’s existing communication infrastructure and [service(s) to be transitioned] include the following activities or sub-tasks:

* **Sub-task 1:** Assessment and Inventory Analysis of [service(s) to be transitioned]
* **Sub-task 2:** Transition Inventory Report

### Sub-task 1: Assessment and Analysis of Existing Network Infrastructure

The offeror shall perform an assessment and inventory analysis of the [Agency] existing telecommunication systems and the network topology including Voice, Data, and Video configuration for each site location or service environment.

Table 2.1.1-1 identifies the core service elements that may comprise the bulk of the transition inventory including but not limited to:

1. Voice Systems Topology & Configuration
2. Network Architecture
3. Audio/Video/Web Conferencing
4. Wide Area Network/Local Area Network (WAN/LAN)
5. Site locations Inventory and Categorization
6. Equipment and devices to be replaced or removed (if applicable)

The offeror shall plan, schedule, gather information, and review the Agency’s current services, systems and associated equipment that will be transitioned or impacted with the transition. At the end of the review and data collection exercise, the offeror shall develop and submit a Transition Inventory Report to the government.

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| Table 2.1.1-1 provides a suggested assessment checklist of networking elements including services and equipment features and other underlying resources that may need to be identified and assessed for its current state, condition, and availability to support transition to the new platform or new technology.  Depending on the Agency’s needs for transitioning services to the new technology or platform, and whether the Agency may already have an inventory report and a list of its telecommunication systems and site configuration, Task 1 can be streamlined to focus only on the select list of service(s) to be transitioned to meet the agency’s requirements. |

**Table 2.1.1 -1 Assessment Checklist for Transition**

| **Core Elements** | **Technical Requirements** |
| --- | --- |
| **Voice Systems & Configuration** | * The offeror shall identify and assess telephony platforms currently in place: * Electronic Key Telephone Systems (EKTS), * IP Telephony systems, * Centrex services * The offeror shall identify and assess Site Configurations (host, remote or independent site) and make an assessment of the telephony platforms currently in use (number of sites, telephony platforms and total population or users at each site) * The offeror shall assess existing Voicemail capabilities including: * Enterprise Voice Messaging System (EVMS) - voicemail message broadcasting and forwarding capabilities and   + 1. Subscriber features include personal message management, personal lists and multiple greetings     2. System features consist of multiple classes of service, system distribution lists and digital networking     3. Network features include digital protocol gateways, enhanced lists and broadcast capabilities. * Centralized voice messaging systems capable of supporting large number of voicemail subscribers * Standalone voicemail platforms * The offeror shall have a compiled list of circuits and subscriber data as part of a migration event. The offeror shall verify that the data compiled are accurate. The offeror shall assign and track any changes on the following:   • access or transport changes  • switch port assignments, Office Equipment  • data changes  • switch routing changes and/or changes that might be necessary to route calls to the proper termination point   * The offeror shall develop a method for keeping this data accurate and up to date. Final validation and numbering assignment process shall be coordinated with the start of a freeze[[1]](#footnote-2) period, and will be repeated just prior to each migration event. |
| **Audio/Video/Web Conferencing** | * The offeror shall evaluate the current state and configuration of the video conferencing and audio conferencing systems used by the Agency including features and capabilities supporting audio, video, and web conferencing suites and the sites/locations capabilities where deployed. |
| **Network System Architecture and Configuration** | * The offeror shall evaluate and assess the Agency's Private Network architecture and configuration (i.e. Network-based Internet Protocol (IP) Virtual Private Network (NB-IP VPN), MPLS (Multiprotocol Label Switching) Wide Area Network (WAN), or Ethernet Local Area Network (LAN), etc.); this may include performance and capacity assessment of the network. * The offeror shall assess the current state and availability of the network-based architecture supporting the Voice communication systems including features and capabilities currently in use. |
| **WAN / LAN Connectivity** | * The offeror shall identify and assess the Agency's WAN connectivity (e.g. Ethernet vs. Multiprotocol Label Switching Wide Area Network/Local Area Network (**MPLS WAN/LAN):**  1. Access redundancy 2. Hub and spoke sites classification 3. Routing protocols used within the MPLS infrastructure  * The offeror shall identify and assess the Agency's **On Premises LAN and WAN Infrastructure.**  1. Inventory List shall provide a summary of the equipment at the sites’ edge, depending on the size of the circuit. 2. Beyond offeror-provided equipment at the site’s edge, the offeror shall determine what the routers are or Layer 2 or 3 switches deployed (i.e., edge router). |
| **Site Locations and Categories** | * The offeror shall identify and assess the Agency's site locations based on type of Telephony and other services in place, population (number of users), Traffic (usage and call volumes), and Class of Service.  1. Locations with Legacy Voice/Private Branch Exchange (PBX) 2. Locations configured with VoIP over the LAN and IP phones 3. Locations with Voice systems supported by a combination of Session Initiation Protocol (SIP), Primary Rate Interface (PRI), and/or Analog 4. Locations categorized as either host, independent, or remote, etc. 5. **Site locations Inventory** 6. Sites range based on population size (large vs. small or independent sites) 7. Site access type/network connectivity at each major hub sites 8. Sites with redundant connectivity to MPLS network 9. **Quality of Service (QoS) and Traffic differentiation** 10. MPLS network by Classes of Service to distinguish traffic 11. **Real Estate / Facility Hours / Space Configuration** 12. Does facility have adequate electrical source and power supply, heating, ventilation, and air conditioning (/HVAC)? 13. Accessibility to the building and hours of operation 14. Security clearance level required for transition technician to access the location? 15. Is the space adequate for the new equipment to be installed 16. Will build-out or incidental construction be required? |
| 1. **Equipment and other associated devices to be replaced or removed** | The offeror shall identify the equipment to be replaced or removed.   1. Quantity 2. Model, Equipment type 3. End of Life (EOL) / Expiration date of Warranty 4. Special handling requirements |

### Sub-task 2: Transition Inventory Report

#### Prepare and Utilize Transition Inventory Report

The offeror shall prepare and submit a complete and detailed transition inventory report of [service(s) to be transitioned] including supporting documentation useful for network assessment, network planning, network optimization, and integration of a scalable transition solution into the Agency’s current network architecture.

1. The Transition Inventory Report shall outline the current state, condition, and availability of the Agency’s telecommunication services “as is” and shall include total count by site location, user population supported (if applicable), and existing features (e.g. Telecommunications Service Priority (TSP) status, Class of Service, Routine/Category service level, etc.) and other identifying service parameters to determine the Agency needs to replace the service (e.g. whether for a like-for-like transition or a complete upgrade and replacement to a new platform or technology).
2. The offeror shall also perform an assessment of which of the common services infrastructure can be leveraged and taken into consideration in planning and transitioning the [service(s) to be transitioned] in order to implement a transition solution that is reliable, scalable, easy to implement, and easy to manage.
3. Utilizing the Transition Inventory Report, the Agency may require the offeror to act as the site/system integrator to coordinate with the Agency’s incoming and outgoing service providers to plan for disconnecting old services and adding new services in a synchronized manner. Offeror support may include assisting the Agency in validating that the service order data is correct and complete when placing new service orders with the new service provider as well as in verifying that the cancellation and disconnect orders are submitted timely with the outgoing or incumbent service provider.
4. The offeror shall be responsible for the accuracy of the Transition Inventory Report and any discrepancy discovered shall be communicated to the Agency within one business day with a recommendation of how the discrepancy should be resolved.
5. As the site integrator, the offeror shall take upon the lead role (with the authority on behalf of the Agency) to manage, update, revise, coordinate and validate the transition inventory of services at each site location and disseminate the inventory report in a timely manner to all parties involved with the transition.
6. A template for Transition Inventory Report is provided in ***Attachment J - Transition Inventory Report for [name of service]***

#### Lifecycle Inventory Management Support

On an ongoing basis, the offeror shall track where equipment was installed/stored at all times (post-transition) as a part of its inventory management responsibilities. The support services and tasks shall include the creation and ongoing maintenance of an inventory database of installed services and associated equipment that must be made readily accessible to the [Agency] personnel.

The offeror shall be responsible for controlling and coordinating access to the inventory database to authorized and appropriate service providers, equipment vendors, and other third party contractors on an as needed basis. The offeror shall provide electronic or online access to [Agency] inventory data so that the inventory can be reviewed at any time by the Agency.

## Task 2: Transition Program Management

The [Agency] recognizes that tasks for Program Management are an essential component for successful contract management and establishing an ongoing successful [Agency]-Contractor relationship. The [Agency] requires a relationship with the Connections II contractor based on the following key attributes:

* Appropriate governance structures
* Mutual trust and respect
* Excellent communication skills
* Well-defined objectives and service levels
* Well-defined roles and responsibilities

Program-wide services are the cross functional support services that set forth the roles and responsibilities required under this task order to implement a complete transition solution that is reliable, scalable, easy to implement, and easy to manage.

### Sub-task 1: General Roles and Responsibilities

The following table identifies general program management roles and responsibilities associated with Task 2. An “X” is placed in the column under the Party that will be responsible for performing the task. For the roles and responsibilities indicated in the column labeled “Offeror”, the offeror shall perform, provide support, and meet the requirements.

**Table 2.2.1-1 – General Roles and Responsibilities for Transition**

| **General Roles and Responsibilities** | **Offeror** | **Agency** |
| --- | --- | --- |
| 1. Provide transition support services (Labor Categories), equipment, and equipment services supporting the processes for the [Agency]’s enterprise-wide Transition project. | **X** |  |
| 1. Review and approve the Agency-Level Transition Plan (ALTP) and other documentation supporting the transition project including transition cutover and methodology proposed or planned for each site location.  * The Government reserves the right to modify the schedule and revise the Transition Plan and the implementation approach before installation commenced. |  | **X** |
| 1. Utilize work breakdown structures, historical information, transition best practices and a clear understanding of the scope of transition and resources required in order to determine staffing needs for each phase of the transition. | **X** |  |
| 1. Review the offeror’s Transition Team organizational chart and personnel qualifications and assess whether the team meets the technical requirements to support of Agency-wide transition. |  | **X** |
| 1. Comply with [Agency] policies, guiding principles , standards and regulatory requirements applicable to the [Agency] for information, information systems, personnel, physical and technical security | **X** |  |
| 1. Act as systems integrator and site integrator to manage, monitor, and facilitate coordination between the offeror and local Government contacts (LGCs) and other Agency service providers. |  | **X** |
| 1. Assist the offeror in resolving any conflicts with LGCs and other Agency service providers |  | **X** |
| 1. Provide timely creation, updates, maintenance and provision of all appropriate project plans, project time and cost estimates, technical specifications, transition program management documentation and management reporting in a form/format that is acceptable to the [Agency]. | **X** |  |
| 1. Maintain and update a project management plan as changes are made to the project schedule, personnel resources, workload assignments, and other logistics supporting this project. | **X** |  |
| 1. Participate in the transition kick-off meeting to review, plan and agree upon the transition approach, cutover methodology and installation planning logistics. Detailed items to be reviewed are described in Section 3.1. | **X** | **X** |

### Sub-task 2: Establish Transition Team

Upon award, the Offeror shall establish a Transition Team responsible for managing and coordinating all transition activities from initial kick off meeting to final handoff and turnover of services for lifecycle management. The offeror shall plan appropriate staffing during implementation to ensure that the Transition Team personnel and resources are used effectively and efficiently.

1. The Transition Team shall be composed of experienced and knowledgeable technical staff and key personnel and readily available to plan, execute and complete a successful implementation.
2. The offeror shall describe and identify the personnel or members of the Transition Team in an organizational chart which shall include a Project Manager, Transition Manager, Network Engineers, Subject Matter Experts (SMEs), and other staff members and qualified technical personnel as appropriate.
3. Periodically, as part of the Program Management Plan, the offeror shall evaluate the staffing levels and augment resources as necessary to meet the Agency's transition project objectives.
4. The Transition Team shall take the lead role as systems integrator and site integrator to manage and coordinate seamless transition of services from the incumbent to the new service provider.
5. The offeror’s Transition Team will assist with the identification, documentation, and assignment of project roles and reporting relationships.
6. The offeror shall be responsible for providing orientation and training to the Transition Team including skills-based training necessary to ensure that the offeror-provided personnel assigned to the transition team are well-prepared, knowledgeable and qualified to perform the work.
7. The offeror shall develop appropriate training topics for in-house orientation and training courses for the offeror-personnel supporting the transition project, including an overview of the transition work to be performed, and the associated guidelines, safety procedures, and processes to follow before, during, and after transition. The Agency may review and provide comments on the training materials as desired or at the request of the offeror.
8. The Transition Team shall provide status updates on deliverables and resource changes to the Program Management Office.

### Sub-task 3: Manage Reporting and Other Communications

The offeror shall define and establish procedures and guidelines for a comprehensive communication and escalation plan. Recordkeeping and reporting shall also be supported.

1. The offeror shall provide formal procedural, reporting and communication processes and escalation procedures upon award for the government to review and approve.
2. A comprehensive calendar year-to-date report, detailing workload, process change or other enhancements, shall be prepared and provided to the Agency on a monthly basis.
3. The offeror’s Transition Team shall participate in weekly or bi-weekly teleconferences to provide statuses on the [Name of Transition Project] and other [Agency] systems or dependencies. Teleconferences shall be scheduled generally less than 2 hours in duration. The offeror shall provide an update on its activities, what has been completed, planned for the following week, and other achievements, problems, or future activities that may impact the workload.
4. The offeror’s Transition Team shall keep the Agency apprised of its activities on a regular basis. The Agency expects the Transition Team to be in daily or weekly contact via phone, email, or face-to-face with its Agency counterparts. The frequency of these contacts will change depending upon the workload, issues identified, etc.
5. The offeror’s Transition Team shall provide ad hoc performance, workload, or other reports at the request of the Agency. These requests generally arise from external requests for information or special projects requiring data other than that normally provided to the Agency during the offeror’s normal reporting activities.

### Sub-task 4: Day-to-Day Transition Support

Acting as the system integrator (site integrator), the offeror shall be responsible for the day-to-day operational support and monitoring of all ongoing transition activities. The offeror shall provide coordination with third party vendors and service providers for the provisioning, monitoring, and troubleshooting of telecommunication services and tracking transition-related issues on a continuous basis during installation. In addition, the offeror shall also be responsible for coordinating the delivery of equipment and transition-related customer premise configuration items as needed agency-wide.

The day-to-day transition coordination activities shall be documented and maintained by the offeror, as approved by the [Agency], and modified and updated on an ongoing basis to reflect changes to the business and operational relationship.

1. The offeror and the [Agency] will agree upon additional points of contact and a reporting structure covering day-to-day operations and reviews of the offeror’s performance.
2. These reviews shall include technical, financial, and service-level requirements reviews as well as the resolution of any contractual issues that may arise.
3. The reporting schedules shall be documented and maintained by the offeror in an online repository accessible to the [Agency]’s management team.
4. A regular meeting schedule shall be required for the different reporting levels established, with ongoing 24-hour access to all of the offeror points of contact when required.

The offeror shall develop and establish processes and procedures acceptable to the [Agency] that can be used to manage day-to-day relationships with Agency service providers, third party equipment vendors, Agency users and other internal and/or external entities that may be affected or impacted with the transition activities including procedures for:

1. Moves, add, changes, disconnects (MACD)
2. Assisting service order placement and process for handling service orders
3. Verification of initial invoice and validating detailed billing file (e.g. At the end of transition, the offeror shall be required to verify the invoice to confirm the services, quantity and price per the transition service order are valid and has correct information).

### Sub-task 5: Develop Agency Level Transition Plan (ALTP)

The offeror shall establish and execute [or recommend] an Agency Level Transition Plan (ALTP) to ensure that the enterprise-wide transition activities from the program kick-off meeting to the handoff (turnover) of services and ongoing lifecycle engineering support are executed properly as planned and on schedule.

* + - 1. The ALTP shall describe the offeror’s role and responsibilities for planning, staffing, executing and coordination of all aspects of transition activity to achieve the Government’s objectives.
      2. The ALTP shall capture and establish the transition goals, identify a critical path, and create general timelines to support and implement appropriate operational procedures. The ALTP shall contain at a minimum:
  1. PIP (project implementation plan) with target milestones
  2. Transition Plan Work Breakdown Structure (WBS)
  3. Communication Plan (Transition Reporting and Recordkeeping)
  4. Transition Team organizational chart (with contact information, qualification and experience of key personnel)
  5. Roles and Responsibilities Matrix by Task
  6. Training Plan
  7. Risk Mitigation Plan
  8. Quality Service Assurance Plan (QASP)
  9. Test and Acceptance Plan by scenario
     + 1. A Project Manager (PM)/Transition Manager shall be identified in the ALTP by name, to provide management, direction, administration, quality assurance, and leadership for the execution of this task order. The PM shall serve as the primary point of contact for all transition program activities.
       2. The ALTP shall describe flexible staffing resources (Labor Categories) for professional services, technical expertise, and administrative skills that meet the requirements for each task 1 thru 10.
       3. The ALTP shall delineate the activities, timeline, and resources required to plan, prepare and execute the agency-wide transition program. For each aspect of the network transition roadmap or timeline, the offeror shall briefly describe (as applicable):
* Staffing needs and estimated level of effort for all activities required for transition support such as pre-planning, initial installation phase, transition and turn-up, testing and acceptance, transition cutover, rollback planning, and handoff of newly transitioned services for lifecycle engineering support, equipment repair and maintenance.
  + - 1. The ALTP shall serve as a repository documenting the processes and methodology for meeting the requirements of each task described in this SOW.
      2. The ALTP shall be updated periodically for any changes to the program plans, activities, schedules, and any other related issues that may potentially impact the delivery and performance of the managed transition solution.
      3. An initial draft ALTP shall be provided to the Government with the proposal. Upon award the Government will provide comments, which shall be incorporated into the final ALTP. The offeror shall provide to the Agency both the draft and final document deliverables in MS Word format, and any required briefings/presentations in MS PowerPoint format.

## Task 3: Pre-installation Planning (Staging)

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| **Pre-installation Planning**  Transitioning and deploying a new service places new demands on the Agency's enterprise network. Rollouts that typically involve decommissioning legacy systems (e.g. Old PBX/TDM) and implementing newer technologies such as Voice over Internet Protocol (VoIP) and other services require higher amounts of bandwidth and quality of service (QoS). Therefore, it is critical and important to assess the Agency's network capabilities before adding on applications or transitioning from one platform to another.  For instance, an increase in network traffic could result in the newly installed services, systems or applications not working the way they should, which is likely to affect end-user (Agency employee) adoption rates, or at worst, the Agency vital communications systems could go down.  This section briefly covers basic pre-installation planning and steps the offeror should undertake to assess the resources, capability and readiness of the government's network environment for transition. The offeror is required to perform pre-planning tasks (or staging) and be knowledgeable enough at the start of the transition project to clearly understand the scope of responsibilities required from each party such as the incumbent, the new service provider, and other third party equipment vendors and suppliers.  For instance, a physical site survey must be coordinated with the incoming service provider and should take account of any known issues that may hinder or cause transition delays. (E.g. any physical changes, like cabling changes, reconfiguration of space, or incidental construction may have the potential to delay start date to a greater extent than any other issue.)  The offeror must be required to conduct a physical assessment to validate the logical design and network configuration. In other words, having an adequate assessment of the service environment and physical infrastructure are a prerequisite for successful installation, systems testing and turnover.  **Migration and Timelines**  Migration is transitioning from the old legacy services to the new platform or new technology. Migration timelines vary significantly depending on the proposed architecture and the complexity of the solution. Work specific to migration to new technology can be organized into three phases; Market Design and Analysis, Execution, and Decommission. Some general tasks associated with each phase can be presented in a Gantt chart that shows which items or activities can be run in parallel. The Agency may add a requirement for the offeror to provide a migration timeline as part of the proposal. |

The sub-tasks in this section are pre-requisites prior to actual installation and cutover. Staging for transition is an essential best practice to prepare for a coordinated and well-synchronized installation and transitioning of services with minimal disruption and schedule delays.

### Sub-task 1: Pre-Installation Tasks and Staging for Transition

The offeror shall perform pre-planning tasks (or staging for transition) as outlined under this section. The offeror must be knowledgeable enough and clearly understand the scope of responsibilities required from all involved parties such as the incumbent, the new service provider, and other third party equipment vendors and suppliers. The tasks include but are not limited to:

* Participate in a kick off meeting organized and facilitated by the [Agency]
* Lead and coordinate physical assessment (site surveys) of the service environment to validate against the logical design and configuration
* Coordinate the handling of equipment delivery required to support transition

### Sub-task 2: Participate in Program Kick-off Meeting

Prior to the installation, turn up and transition of services, a kick off meeting will be scheduled by the [Agency]. The offeror shall participate in the Agency’s transition program kick-off meeting which will be scheduled by the government within 30 days of contract award.

The offeror shall be prepared to submit and make available the following items and documentation which will be reviewed and agreed upon during the kickoff:

1. Roadmap and Design:
   * 1. Review Solution
     2. Plan Site Survey
     3. Plan Agency Site Work
2. Delivery Schedule
3. Project Management Methodology
4. Risk Management Methodology
5. Escalation and Jeopardy Process
6. Issue Management Process
7. Resource Leveling
8. Change Control Methodology
9. Roles & Responsibilities
10. Project Staffing
11. Transition Plan / Installation Plan
12. Testing and Acceptance Criteria
13. Back-out Plan (Fall-back Plan)
14. Primary and Secondary Points of Contacts for both offeror’s Transition Team and the Agency

### Sub-task 3: Control and Maintain Transition Documents

During pre-installation planning or staging, the offeror shall track, maintain and apply change control management (version control) on all transition documents including project plans and other transition-specific documentation approved by the government and agreed upon by all stakeholders (e.g. outgoing/incumbent and incoming service providers).

Consolidating and examining documentation is the first stage of creating a complete view of the government's network topology, service environment and an inventory list of telecommunications services and location identifications (IDs) that will be impacted by the transition effort.

In addition, the offeror shall manage other transition-related documents to be identified and reviewed to prepare for transition, including but not limited to:

1. Hardware specifications regarding switches, routers hubs and firewalls
2. Software types, versions and upgrade/update paths it followed
3. Incumbent service provider reports, including security event monitoring information, bandwidth usage and network utilization by protocols (e.g. assuming that the transition is from TDM/PBX to VoIP/Converged Network for Voice, Data, and Video)

During the pre-installation planning activities, the offeror shall refer back to the documentation as frequently as needed and validate whether the logical architecture accurately reflects the actual physical state of the network. Any discrepancies discovered during site survey should be properly documented and reported back to the government with a recommended resolution. The offeror may also propose new approaches where operational and technical reporting processes can be improved.

### Sub-task 4: Transition Specific Roles and Responsibilities

The following table identifies transition specific roles and responsibilities associated with Task 3. An “X” is placed in the column under the Party that will be responsible for performing the task. For the roles and responsibilities indicated in the column labeled “Connections II Contractor” the offeror shall perform, provide support, and meet the requirements.

The Roles & Responsibilities will be defined during pre-installation planning and agreed upon by all parties at the kick off meeting.

**Table 2.3.4-1 – General Roles and Responsibilities for Transition**

| **Transition- Specific Roles and Responsibilities** | **Agency** | **Connections II**  **Contractor** | **Third Party Contractors** |
| --- | --- | --- | --- |
| 1. Confirm service environment, space, and power supply are available and accessible at each government site/location 2. Provide and coordinate building security access requirements, as required 3. Notify local government contact (LGC) at the site location for awareness and availability for installs (e.g. engage Building engineers, as required to verify access to all Telco and phone closets / rooms for technicians) 4. Verify site location address with all contractors to facilitate any installation or upgrades. 5. Facilitate and hold a kick off meeting to review transition schedule, plans and other transition-related documents | **X** |  |  |
| 1. Draft ALTP which includes government’s initial review comments will be presented and reviewed at the kick off meeting. 2. The Task lead and Transition Manager for the offeror’s Transition Team will chair installation status meetings with the [Agency’s] project sponsor(s) and team members and provide progress reports to track transition-specific project deadlines and milestones. 3. Track and document all of the items reviewed and agreed during kick- off meeting (perform recordkeeping). 4. Prepare and submit a final Transition-specific Project Plan (ALTP) for final approval with the [Agency] within 5 days after the kick off meeting. 5. Begin weekly status reporting 6. Convene Change Control Board (*The offeror leads the CCB and is responsible for tracking and managing all the changes during transition*) 7. Refine details for transition plan / installation plan as needed |  | **X** |  |
| 1. The Agency ensures the incumbent (outgoing service provider), incoming service provider and equipment vendors review and agree to their applicable transition documents and other items presented and reviewed during kick- off meeting. 2. The Agency ensures the Incumbent Service Provider submits a complete list of site locations covered by the transition plan; this list will be provided by the Agency to the new service provider. | **X** |  | **X** |

## Task 4: Testing and Acceptance

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| The Transition Team has a critical role in supporting the Agency during testing and acceptance.  This section provides requirements for the offeror to successfully perform tasks outlined in the Test and Acceptance for each service deliverable for the Solution, System or Network. Testing can be conducted at the pilot level or at select site locations and once testing and acceptance is successful, full deployment to the production environment can occur.  Below is an example of the Test and Acceptance plan and steps for government site locations:   * Testing and Acceptance at the Access circuit level * Testing and Acceptance at the extended demarc (hard loop testing will be conducted) * Testing and Acceptance at the customer premise equipment (CPE) as applicable, also called loopback testing.   The government can also specify whether they can provide or connect their router (e.g. within 5 business days) to successfully complete the physical connection to the Customer provided Equipment (CPE) and perform end-to–end testing with the transition technician. |

Under this Task, the offeror shall validate that the service/system solution has been completely tested and is ready for transition or installation. The following shall be completed:

1. Testing as per the approved test and acceptance plan
2. Receive written Acceptance from Customer’s Point of Contact
3. Distribute “Go Notice”

Once project scope is defined and baselined during the program kick-off meeting, the offeror’s Transition Team shall finalize Transition Plans with the government based upon the government facility or site/support locations physical transition requirements.

### Sub-task 1: Develop Test and Acceptance Plan

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| The testing and acceptance requirements suggested in this section are specific to testing T1/PRI circuits (loopback testing). Depending on the type of services to be transitioned, some of the requirements here may not be applicable. The Agency is free to add Agency-specific requirements that meet their needs for support services during testing and acceptance. |

The offeror’s Transition Team shall provide a Test and Acceptance Plan which outlines the testing to be performed at all locations within the Customer’s geographic scope.

The offeror shall deploy personnel to provide support during testing and acceptance as outlined under this section. The offeror must be knowledgeable enough and clearly understand the scope of responsibilities required from all involved parties such as the incumbent, the new service provider, and other third party equipment vendors and suppliers.

The test plan shall be composed of the following four elements:

* Description of the acceptance testing strategy and acceptance testing process
* Identification of detailed acceptance testing tasks with assigned personnel
* Test and acceptance team, roles, and responsibilities
* A detailed acceptance-testing schedule.

Upon successful Testing and Acceptance validation by the Agency during pilot installation, full deployment of the solution shall begin.

The offeror’s Transition Team shall provide a draft Test and Acceptance Plan which outlines the testing to be performed at all locations within the Agency’s geographic scope. The Test and Acceptance Plan shall be provided for the Agency to validate that Solution specifications meet the requirements. The offeror’s Transition Team will successfully perform Test and Acceptance for each service deliverable for the Solution / Network. Below is an example outline of the steps to perform testing and acceptance for [Agency’s] locations at each level of the testing phase:

* Level 1: Access circuit testing and acceptance (loopback test at the telco or service provider)
* Level 2: Extended demarc hard loop testing to be conducted
* Level 3: CSU/DSU, as applicable (e.g. loopback testing at the customer premise or CPE).

The offeror shall coordinate with the Agency and any other applicable contractors to connect the Agency router within [xx] business days to successfully complete the physical connection to the Agency provided equipment (e.g. CPE) and perform end-to–end testing with transition technician.

Test and Turn Up shall be supported by offeror-provided helpdesk tools and middleware platforms (if applicable).

Go/No Go notices shall be provided by the contractor to all interested parties within 72 hours of test and turn-up.

### Sub-task 2: Offeror Facilitates “Go / No Go” Decision Point

In the process of transitioning old or expiring services to the new consolidated service/systems or solution, a formal **“Go / No Go Decision**” must be made (or communicated) and recorded. Making a “Go / No Go Decision” is the responsibility of both the offeror Transition Team's Project Manager and the Agency's PMO (Government Program / Project Manager).

1. A **“Go” decision** means all planned activities are ready for the activation of the product or service ordered. The physical activation (also known as: “Go Live” or “Cutover”) is tracked via a tracking tool time/date stamp. This cannot occur until a formal **“Go” decision** has been made or communicated and recorded. The activation and completion notices must occur within 72 hours of the formal Go decision.
2. A **“No Go” decision** means that the activation cannot occur on the planned due date as per the reasons specified. A **“No Go” decision** means that the transitioning of the new service/systems or solution will not occur as per the original planned date. If a “No Go” decision is required within the 72 hour window the offeror shall perform the following:
3. The offeror Transition Team Project Manager shall document the reason for the “No Go” decision.
4. The offeror Transition Team Project Manager must send required updates to System Development and Processing Management groups via a spreadsheet which contains the required information (e.g. required data set (RDS)) through a resource mail box.
5. If condition arises during the cutover before the “Due Date Confirm” is issued, the offeror Transition Team PM must immediately inform the impacted service/systems (e.g. help desk nodes or service desk centers) that there is a change to the planned completion date.
6. If the activation / cutover fails, the offeror Transition Team PM must provide the reason for the “No Go” decision. Then the revised completion date shall be updated in the workflow tracking system. The Transition PM must also ensure the trouble tickets inventory are reviewed for data integrity and ready when the next transition task is invoked.

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| **Reschedule vs. No Go Decision**  The Agency (e.g. or other internal Agency groups managing the helpdesk platforms and/or service nodes) and the Transition Team Program / Project Managers have the option of making a “Reschedule” decision greater than 72 hours prior to the planned completion date.  This approach is less cumbersome or time-consuming and will void the need to make a formal “No Go” decision and will also help to maintain higher “Go” vs. “No Go” statistics. |

1. When a “Reschedule” decision is made outside the required 72-hour window (greater than 72 hours before the scheduled completion), the offeror shall update the End-to-End Flow-through Management System (or workflow systems); updating the work flow system will reset the scheduled completion date.

## Task 5: Installation (Transition and Turn Up)

Once the transition project scope is defined and baselined during pre-planning, the offeror Transition Team shall finalize Transition Plans with the [Agency] and make the necessary preparations based upon Agency’s physical transition requirements. The offeror shall:

* Coordinate and provide support for Site Survey
* Coordinate and provide support for [Agency] site work
* Facilitate the handling and delivery of equipment
* Assist in ordering and disconnects or cancellation of old services

### Sub-task 1: Assist in Ordering and Disconnects

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| The Agency’s designated authorized representative or the contracting officer representative must approve all transition orders., The Agency has the option to have requirements for the offeror to assist and help the agency in drafting or validating the orders and ensure the order information are correct and complete.  This is helpful when the transition project is complex and covers a large geographic scope and/or there are multiple services to be transitioned at a single or multiple locations. |

Once the project timelines for transitioning are approved and confirmed by the [Agency], the offeror shall perform the following tasks to prepare for the provisioning of services.

The offeror shall provide personnel with telecommunications skills and experience to assist the Agency in ordering. These tasks will commence upon the installation and turn up of products and services and/or associated equipment. The offeror shall:

* Assist and help the government in placing transition orders for services, equipment and system solution that have been approved and authorized by the Agency.
* Assist and help the government in placing cancellation orders or the timely disconnects of services that are expiring or to be replaced. During parallel cutover, the disconnect must not occur while the new service is being installed or provisioned; this will minimize disruption to users and service outages

### Sub-task 2: Coordinate and Support Site Survey

Upon task order award, the offeror shall coordinate with the Agency’s service provider for site surveys to include scheduling and planning. Prior to conducting any site surveys, the offeror shall prepare and submit for Government approval a standardized “site survey checklist” that provides a comprehensive list of the information that will be collected during site surveys.

Although it is expected that the incoming service provider may have its own method of conducting site surveys, the Connections II offeror, at a minimum, must be knowledgeable and shall train its own personnel to be familiar with the site survey process. The offeror shall:

1. Utilize the site survey checklists to identify requirements needed for site preparation work, space requirements, power requirements, cabling, etc.
2. Track any other transition-related issues uncovered during site survey, provide resolution, and communicate any specific assistance needed from the Government prior to implementing new services/systems or upgrading existing services/systems.
3. Deploy support services personnel at designated locations as scheduled for site survey.

As ordered by the Government, the offeror shall coordinate and provide support services during site surveys at domestic Government facilities to collect the information identified on the Government-approved checklist. During the site survey, the offeror shall address any preliminary data gathering (e.g., existing numbering plans, equipment locations, space, power supply, and workstations for key offeror personnel, etc.) and lead the coordination activities necessary to ensure the successful completion of pre-planning activities.

##### Site Survey Report

The offeror shall document the outcome of the site surveys in a Site Survey Report. A consolidated site survey report must be collected and delivered to the government. The site survey report shall document the results of all site surveys conducted at the government facility/sites or support locations identified under this task order.

It is also possible that the new service provider will conduct its own site survey, then prepare and submit the site survey report to the offeror being the Agency’s site integrator.

### Sub-task 3: Coordinate Equipment Handling

If the transition and installation involves delivery of equipment or if service enabling devices are required for transition, the following tasks and activities shall be performed by the offeror:

1. Coordinate equipment project purchases with the Agency’s procurement group - when necessary
2. Track equipment deliveries
3. Manage equipment shipments (coordinate with vendors, freight forwarders, logistics, customs, staff, Agency’s, etc.) when necessary
4. Facilitate/Coordinate equipment installation efforts
5. Facilitate/Coordinate acceptance test procedures
6. Manage and secure Agency/project final acceptance of equipment
7. Prepare and maintain a comprehensive list of deliverables, including equipment inventory and warranty, that are necessary for the transition project

### Sub-task 4: Provide Support for Transition and Turn-up

As the Agency’s designated site integrator, the offeror shall lead, coordinate and provide transition support at designated Agency locations as well as provide skilled personnel and if required, provide systems and applications or tools as needed to facilitate the transitioning of services.

#### Network Transition Support by Service Location

The offeror shall coordinate and provide transition support at each service location including the delivery of equipment, installation of services, acceptance and testing and other tasks required to complete the transition.

A description and address of all [Agency] facility and office locations requiring network transition support is provided in ***Attachment B – Support Locations***.

#### Network Transition Support for Complex or Multi-site Transition

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| If the transition is complex, the Agency may require the offeror to support a pilot installation at select site locations prior to a full blown installation to all production environments. In this case, the offeror shall perform Installation in Phases.  When an Agency has a need for network transition support that involves complex or multiple sites with mission-critical requirements, the Agency may request the offeror to fulfill the need by approaching it as a project.  This type of transition may include additional steps or activities to support and coordinate complex transition such as adding multiple services at a single location, adding new technology or services to multiple locations, cancelling expiring services while implementing a new private network, or migrating services from an existing provider to a new provider. |

Upon government request and depending on the size and complexity of the transition project, the offeror shall develop and provide a Project-level Transition Plan (TP) which is part of the overall master schedule in the ALTP to describe project schedules, milestones, and resources needed and appropriate for each site location or for a phased-by-phased project:

1. Transition schedule and activities by site location or site category
2. Transition activities scheduled by phases or by project
3. Transition activities that are complex shall require a Rollback Plan

Project level or site-specific transition planning for complex transitions shall be provided as needed to ensure the offeror adequately addresses Agency-specific special requirements for coordinating with third party contractors, equipment vendors/suppliers, and service providers in a timely manner to coordinate transition/turn-up and activation of services.

## Task 6: Cutover and Transition Methodology

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| **An Overview of Cutover and Transition Methodology**  The transition from an Agency's old network/telecommunications system into a new one is called cutover. The detailed process that leads towards its successful implementation is known as cutover planning. The implementation activities surrounding a cutover are disruptive. The main objective of a cutover plan is to minimize disruption. The suggested requirements in this section are applicable to large cutover processes of voice, data, and video equipment with respect to transitioning Legacy TDM/PBXs (old) to IP enabled Voice service (new).  Lesser scale projects may omit or abbreviate some of these procedures and requirements. It is important to keep in mind that as cutovers are not identical the Agency may add new requirements (specific skill sets, system tools, or process steps, etc.) to be included in its SOW in order to deal with unique characteristics of the Agency's service environment.  **Cutover Types**  There are two main classes of cutover:   1. **Parallel Operations cutover:** where the legacy system is left functioning and the new system is installed around it (this method is more reliable but also more expensive, since the Agency is paying for 2 services at the same time) 2. **Flash cutover**: where the change is completed in a short-span of time normally during scheduled maintenance window or on weekends when there is less disruption to users   **Coordination and communication with the government’s service providers**  As the government’s designated Site Integrator, the offeror’s Transition Team is required to lead and coordinate transition activities with the government’s third party contractors including service providers. Proper communication and a clear understanding of the scope, requirements and complexity of the transition for each site or for each type of service to be installed are critical and key to a successful and seamless transition of services. |

### Sub-task 1: Provide Support During Cutover

Upon successful Testing and Acceptance validation by the government, cutover and deployment of the services or solution will begin.

Once the project timelines for installation are confirmed by the Agency, provisioning will commence to install and/or turn up products and services and/or equipment. The offeror shall be prepared to provide transition support during installation and cutover that meets the government requirements.

* As the government’s designated System/Site Integrator, the offeror’s Transition Team shall be required to lead and coordinate transition activities with the government’s third party contractors including equipment vendors and telecommunication service providers.
* The rules and procedures established in the agreed upon Communication Plan shall be observed and enforced.
* The offeror shall develop a cutover plan for each site. The initial transition cutover plan and upcoming activities scheduled for each site shall be clearly communicated to all parties involved including end-users that will be affected to minimize service disruption.
* The offeror shall conduct a preliminary review with the third party contractor and/or service provider on the cutover methodology and the scope of the transition requirements applicable for each site or for each type of service to be installed.
* As a basic principle and best practice of Transition Methodology, the offeror’s Transition Team shall be required to conduct a series of rigorous tests and quality checkpoints to make sure the new services meet or exceed operating and performance requirements during the transition, test and turn-up and shall make sure the newly installed services meet the NOC (Network Operations Center) Acceptance processes.

### Sub-task 2: Develop Cutover Procedures

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| The extent and complexity of implementing cutover procedures will depend upon the type of services being transitioned. The Agency is free to add Agency-specific requirements in this section that meet their needs.  Cutover Requirements basically include 6 steps:   1. Planning the cutover 2. Change Control 3. Conducting the network facility and station reviews 4. Establishing a Rollback Plan 5. Testing the new system 6. Conducting post-cutover test and follow-up   It is important to remember that the success or failure of the cutover will be measured by the amount of disruption experienced by users after the first few days of the cutover have passed.  The numbers of discrepancies that occur depend on the amount of changes to be implemented after the cutover’s freeze date, i.e., the date from which new orders, add orders, moves, or change orders will no longer be allowed or processed until the cutover is complete. Therefore, it is also important to manage, track, and control any changes that occur leading up to the cutover and implementation of the new system or services. |

The offeror shall develop and prepare transition solutions on a site by site basis to plan and execute the appropriate transition methodology or cutover approach applicable for the site. The offeror must provide experienced and skilled personnel knowledgeable with the different types of cutover methodology to be employed.

The Transition or Cutover Methodology described under this SOW applies to telecommunication services being transitioned. At a minimum, the offeror shall be knowledgeable, and be familiar with the cutover methods, and shall make the necessary preparation to provide network transition support as applicable for each project.

A template for Cutover Task List is provided in ***Attachment I - Cutover Task List for [name of service]***

Cutover plans shall be developed for each project or for each type of service ordered. The cutover plan shall address the government requirements as applicable using either of the two (2) potential scenarios:

1. Scenario 1: Parallel Operation of Services
2. Scenario 2: Flash Cutover (Non-Parallel Operation of Services)

#### Scenario 1: Parallel Operation of Services

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| **Primer on Parallel Operation of Services**  This type of transition or cutover methodology is the most common method and has less complexity or risk of disruption. The approach is to have a parallel operation of the old or existing service and the new service for a period of time to be determined by the Agency. Then a Disconnect/Cancellation of Incumbent Service will be done at Agency’s discretion. |

The offeror shall lead, coordinate and provide network transition support that meets the government requirements for parallel operations cutover as applicable to a site location or a group of building locations or campus. Such a cutover includes the following three major steps:

* Legacy system is left functioning and the new system is installed around it
* Old service remains active for a period of time while the new service is installed, tested and turned up
* Disconnect/Cancellation of Incumbent Service is done at Agency’s discretion

The offeror shall support the Agency with:

* Test and Turn-Up Process
* NOC Acceptance Process
* Agency Acceptance Process
* Parallel Operation for a period of time to be determined by the Agency
* Disconnect/Cancellation of Incumbent Service at Agency’s discretion

The offeror shall perform the following tasks and procedures:

* Determine whether this type of cutover scenario is applicable to a site location or service during planning phase
* Document how this will fit into the master schedule project plan of cutover activities, to include Parallel Operations of Services Scenario, and where applicable the offeror shall also identify its critical path in a PERT (Program Evaluation and Review Technique) Chart
* Ensure that all stakeholders sign off on this Cutover approach relative to the Master Schedule
* Develop clearly defined Agency Acceptance Criteria
* Facilitates and leads the Go/No Go Decision.

#### Scenario 2: Flash Cutover (Non-Parallel Operation of Services)

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| **Primer on Flash Cutover**  Flash **Cutover** is an immediate change in a complex system, with no phase-in period.  A flash cutover can also be defined as a transition procedure in which multiple components of a network infrastructure are upgraded in multiple ways, all at once, with no phase-in period.  Unlike Parallel operation, Flash Cutover does not require the old and new services to be up and running at the same time or to run in parallel operations for a longer period of time. The old service is put into a “freeze” period, which means new orders, add orders, moves, or change orders will not be allowed or processed during a specific period prior to the cutover and while the flash cutover is being implemented (actual deployment is usually done on a weekend or during scheduled outages or maintenance window).  The disconnection of old services is done immediately once the new service has been installed, tested and provisioned properly. Keep in mind that a Flash Cutover must have a Rollback Plan in case of delays or unforeseen issues with the scheduled cutover. The Rollback Plan ensures the old service can be resumed to minimize user disruption. |

**Flash Cutover**

The offeror shall lead, coordinate and provide transition support that meets the government requirements for transitioning services in a flash cutover method applicable to a site location or a group of building locations, campus or services with similar category. Such a cutover involves the following major steps:

* The old service will be put into a “freeze” period, which means new orders, add orders, moves, or change orders will not be allowed while the flash cutover is being implemented (usually on a weekend or during scheduled outages/maintenance window) and the new service is being installed, tested and turned up.
* Disconnect old services immediately upon successful testing and provisioning of new services
* Implement Rollback Plan if necessary

The offeror shall support:

* Test and Turn-Up Process
* NOC Acceptance Process
* Agency Acceptance Process
* Coordination of flash cutover for all site locations utilizing specific service in accordance with Agency requirements
* Disconnect/Cancellation of Incumbent Service upon successful completion of cutover
* Apply Rollback Plan procedures should there be any delay or issues with completing the cutover as well as perform steps necessary to minimize user disruptions

The offeror shall perform the following tasks and procedures:

* Determine whether this type of cutover is applicable to a site location or service during the planning phase. Note that Parallel Operation cutover is preferred wherever feasible.
* Develop clearly defined Agency Acceptance Criteria and a clearly defined Rollback Plan
* Document how this will fit into the Master Schedule of cutover activities, and where applicable also identify its critical path in a PERT Chart
* Ensure that all stakeholders sign off on this Cutover approach relative to the Master Schedule
* Ensure incumbent signoff on the Rollback Plan and applicable procedures that minimize user disruption
* Develop clearly defined Agency Acceptance Criteria
* Facilitate and lead the Go/No Go Decision.

**Rollback Plan**

Since this type of cutover methodology carries more risk, potential delays in scheduling external resources, unpredictable outages, service disruption and/or project schedule delays, the offeror (being the Agency’s site integrator) shall be required to develop a Rollback Plan .

The Rollback Plan must be clearly reviewed during kick off meeting, agreed upon and signed off by the incumbent service provider in accordance with the Agency requirements. The offeror shall meet and comply with the requirements outlined in the Rollback Plan.

### Sub-task 3: Monitor Transition Activities and Turn-up

Transition and turn-up shall be conducted at the near conclusion of the transition. The offeror shall be required to monitor transition and turn-up as well as perform test and validation of the newly installed service or solution. Testing and validation, which begins during network turn up, shall be performed by the offeror as follows:

1. Test as per the approved test plan
2. Receive written Acceptance from the Agency’s POC (Point of Contact)
3. Distribute “Go Notice”
4. Verify service performance meets government service level agreement (SLA) requirements upon service activation

## Task 7: Rollback Plan

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| **Establishing a Rollback Plan**  The requirements suggested in this sub-section allow for an alternative procedure in case the cutover schedule is delayed or there is substantial disruption to occur during cutover. The following points to be considered in a Rollback (sometimes called a Fallback) Plan:   1. What other projects depend on the completion of this plan? 2. What penalty will be paid if this plan is delayed? 3. What is the probability of delay? 4. What factors could cause the cutover to be delayed? 5. What alternatives are available to hold the schedule despite delays? |

In the event of significant failure or extreme schedule delay for external resources, the offeror shall be able to implement rollback procedures to the original system.

During the detailed planning and preparation phases of the Agency’s Transition Program, the offeror’s Transition Team shall develop and identify rollback procedures applicable for each service ordered or for a specific group of site locations. The offeror shall describe and document the step-by-step process in a Fall-back Plan. The rollback procedures shall be coordinated with the incumbent service provider to return the services into its original state.

### Sub-task 1: Develop Rollback Plan

The offeror’s Transition Team shall re-review, validate and confirm the rollback procedures with the incumbent service provider and the Agency, in accordance with the government requirements for a Rollback Plan.

The Rollback Plan will contain the specific tasks, activities, responsible parties, and timeframes necessary to assure that service will be restored to the original status in the event of failure or extreme transition delays.

1. The offeror must be able to act upon with minimum supervision and provide leadership to resolve and implement a Rollback Plan if necessary and in cases where transition may experience some level of failures or extreme delay.
2. During the detailed planning and preparation phases of the [Agency’s] Transition Program, the offeror’s Transition Team shall identify and document Exit Transition procedures for each service ordered.
3. The offeror’s Transition Team will assist the government to validate and confirm those procedures with the incumbent provider and to obtain incumbent’s concurrence in accordance with a 100 percent agreed upon Fall-back requirement.
4. Fall-back procedures will contain the specific tasks, activities, responsible parties, and timeframes necessary to assure that service is restored to the original state.
5. Once the Rollback Plan draft is completed, Exit Transition / Fall-back procedures shall be reviewed with the Agency and the incumbent for compliance during kick off meeting or planning phases.
6. Prior to actual cutover of services, Exit Transition / Fall-back procedures shall be reviewed with both the incumbent and the Agency to adapt to any changes made since procedures were created.

### Sub-task 2: Rollback Transition Roles and Responsibilities

The following table identifies rollback transition roles and responsibilities associated with Task 6. An “X” is placed in the column under the Party that will be responsible for performing the task. For the roles and responsibilities indicated in the column labeled “Connections II Contractor”, the offeror shall perform, provide support, and meet the requirements.

**Table 2.6.1-1 – General Roles and Responsibilities for Transition**

| **Rollback Transition Roles and Responsibilities** | **Agency** | **Connections II**  **Contractor** | **Third Party Contractor** |
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| * The offeror’s Transition Team will have a lead role during exit transition. * It will be the responsibility of the offeror’s Transition Team PM to draft specific rollback plans based upon: the specifics of the service or technology to be implemented, the design of the solution, the detailed implementation plan and the specific Agency requirements of the rollback strategy. |  | **X** |  |
| * + It will be the responsibility of the Agency to provide a primary Government POC (point of contact) that will serve as a liaison with Agency engineers and Agency decision makers. It will also be the responsibility of the Agency to verify that the incumbent service provider is present and be cooperative during the rollback planning activities.   + The Agency will review and approve the Rollback Plan, obtain additional technical support if needed, and provide an Agency POC (Agency decision maker) who will act as liaison with incumbent service provider. | **X** |  |  |
| * It will be the responsibility of the incumbent to be present during the exit transition or rollback planning and to sign-off on agreed upon specific activities. * The incumbent role is to provide technical support and sign-off on agreement (Only the Agency can require Incumbent to sign off on the transition procedures and Rollback Plan). |  |  | **X** |

## Task 8: Handoff to Maintenance (Lifecycle) Management

### Sub-task 1: Provide Support during Turnover

The offeror shall provide support during turnover and handoff of the newly transitioned or installed services as outlined under this section.

* The offeror shall perform tasks that involve handoff activities to transition the new service to the Agency’s Program Service Management office (lifecycle management phase of the newly installed service or platform)
* The offeror shall facilitate a formal handoff meeting for the new environment to be managed and maintained by the responsible entities. The attendees at this handoff meeting will include the Agency, the offeror Transition Team, PMO and Account Team.
* The offeror shall also schedule regular stewardship meetings for a period of time at the discretion of the Agency to perform validation and verification of invoices to ascertain the services ordered are correctly billed to the government.

## Task 9: Transition Deliverables

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| Successful transition requires managing and controlling different types of various information and data to track transition activities, processes and procedures and to measure performance.  Transition deliverable examples are provided in this section to help the Agency determine, based on the level of detail required for their particular situation, which deliverables are needed. It is the Agency’s decision as to which deliverables are applicable or meet their needs; the Agency may require the offeror to provide only specific ones or all of the deliverables. |

### Sub-task 1: Develop and Maintain Transition Deliverables

The offeror shall develop and provide the following transition deliverables and reports:

* 1. PIP (Project Implementation Plan) with target milestones.
  2. Transition Inventory Report
  3. Final Agency Level Transition Plan (ALTP) & Work Breakdown Structure (WBS)
  4. Cutover Plans
  5. Rollback Plan
  6. Project Specific Transition Plans (PSTP) - if requested by Agency
     + Transition Planning Report (how many transitions planned per week)
     + Transition Execution Report (how many Transitions executed per week)
     + Identify blocked or delayed orders and escalate - if necessary.
     + Go/No Go notices within 72 hours of test and turn-up
  7. Transition Plan Work Breakdown Structure (WBS)
  8. Test and Acceptance plan
     + Test Plan
     + Acceptance Plan/Agency Sign-off
  9. Project Closeout and Lessons Learned
     + Report actual cost vs. proposed cost
     + Document Lessons Learned
     + Coordinate project hand-over to Operations.
  10. Verification Plan
      + Verify that billing is operational; offeror participate in First Bill Review with operations/billing dept.

# Staffing and Personnel Requirements

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| This is where the Agency provides staffing requirements and labor types needed in support of the Managed Network transition. |

The requirement under this solicitation seeks the support and expertise from Connections II offerors to carry out the Agency’s Network Transition support project from start to finish. Offerors shall propose adequate staffing to meet the requirements for telecommunications network specialists and engineering support to guide the Agency through the transition.

**Labor Types**

The offeror shall provide Labor Types for both professional and technical expertise that fully meet the requirements for all the tasks in support of the requirements specified in this SOW, including the analysis, planning, design, specification, and implementation, of required transition services.

## Personnel Requirements

The offeror has ultimate responsibility for managing the tasks, for achieving the performance results in each of the task areas, and for determining the appropriate staffing pattern in support of its technical approach.

* + - 1. The offeror shall provide experienced personnel to perform the required services. The Government and the offeror understand and agree that the services to be delivered are non-personal services.
      2. Offeror personnel shall conform to standards of conduct and code of ethics, which are consistent with those applicable to Government employees. Offeror personnel shall obtain authorization to have access to Agency support sites and Government facilities, and shall obtain Common Access Cards (CAC) for computer access.
      3. All offeror employees must be fluent in spoken and written English.
      4. Background Checks: All offeror employees must submit a [Questionnaire for National Security Positions (Standard Form 86 (SF86))](http://www.gsa.gov/portal/forms/download/116390) to the [Agency] Personnel Security Manager. A favorable SF-86 is required before gaining access to a U.S. Government LAN. The offeror, when notified of an unfavorable determination by the Government, shall withdraw the employee from consideration from working under the order.
      5. The Contracting Officer may require the offeror to remove from the job site any offeror employee who is identified as a potential threat to the health, safety, security, general well-being or operational mission of the installation and its population.
      6. In order to ensure a smooth and orderly startup of work, it is essential that the key personnel specified in the offeror's proposal be available on the effective date of the order. If these personnel are not made available at that time, the offeror must notify the Contracting Officer and show cause. If the offeror does not show cause, the offeror may be subject to default action.
      7. The offeror-supplied personnel are employees of the offeror and under the administrative control and supervision of the offeror. The offeror, through its personnel, shall perform the tasks prescribed herein. The offeror must select, supervise, and exercise control and direction over its employees (including subcontractors) under this order. The Government shall not exercise any supervision or control over the offeror in its performance of contractual services under this order. The offeror is accountable to the Government for the action of its personnel.

A description of qualifications, skills, and education level for the proposed staffing and personnel requirements is provided in section J.1 of the Connections II contract. The offeror shall propose additional skills and labor categories as needed to meet the requirements.

### Contractor Personnel Security Requirements

1. The Government may require security clearances for performance of this contract. The Offeror must obtain these clearances before beginning work on the contract (Agency will not allow offeror employees without clearance in any of its facilities). The offeror must obtain these clearances by using the eQIP system. If satisfactory security arrangements cannot be made with the offeror, the required services must be obtained from other sources.
2. The level of classified access required will be indicated on **DD-254** or other appropriate form incorporated into each request requiring access to classified information. Contractors are required to have background investigations for suitability if they occupy positions of trust (e.g., systems administration) even if they do NOT have access to classified information.
3. Necessary facility and/or staff clearances must be in place prior to start of work on the contract
4. Contractors are responsible for the security, integrity and appropriate authorized use of their systems interfacing with the Government and or used for the transaction of any and all Government business. The Government, through the Government's Contracting Officer, may require the use or modification of security and/or secure communications technologies related to Government systems access and use.
5. The Government, at its discretion, may suspend or terminate the access and/or use of any or all Government access and systems for conducting business with any/or all Contractors when a security or other electronic access, use or misuse issue gives cause for such action. The suspension or termination may last until such time as the Government determines that the situation has been corrected or no longer exists.

### Special Qualifications and Certifications

The offeror shall ensure that its employees have all required professional certifications and licenses (current and valid) for each applicable task and labor type category before commencement of work.

The offeror’s personnel shall meet the minimum qualifications and certifications and education level as summarized and identified in section J.1 of the Connections II contract**.**

[Agency may add Agency-specific requirements here]

# Travel and Other Direct Costs (ODC) / (Un-priced Items)

## Travel

The offeror shall comply with the Travel and Per Diem requirements as described in Section G.5.1.2 of the Connections II contract including conditions and limitations applying to travel associated with work performed under this SOW.

**Local Vicinity**: If travel within the local vicinity is required, travel reimbursements for local travel are not authorized; neither is the use of a Government vehicle.

**Distance Travel**: If travel outside the local vicinity is required, costs incurred by offeror personnel for travel, including costs of lodging, other subsistence, and incidental expenses, shall be considered reasonable and allowable only to the extent that they do not exceed the rates and amounts set by the Federal Travel Regulations. See **FAR 31.205-46(a)(2)(i)**.

As part of the Price Proposal, the Offeror shall provide any anticipated travel costs, to include origination, destination, and the number of trips, number of persons, and a breakdown of lodging, meals, transportation and related costs.

Prior written approval by the [Agency] Contracting Officer is required for all travel directly and identifiably funded by the [Agency] under this order. The Offeror shall therefore present to the Contracting Officer an itinerary for each planned trip, showing the name of the traveler, purpose of the trip, origin/destination (and intervening stops), and dates of travel, as far in advance of the proposed travel as possible, but in no event less than three weeks before travel is planned to commence.

For cost effectiveness, economy class travel must be used on all official travel funded under this Task Order. Business class travel should only be used under exceptional circumstances. Use of a Government vehicle for distance travel is not authorized.

## Other Direct Cost (ODC)/ Un-priced Items

Other direct costs proposed (e.g. travel, per diem, etc.), which are considered necessary for the completion of the work, shall provide sufficient information to establish the basis for the estimate of such cost.

The Offeror shall provide a breakdown for un-priced items and/or Other Direct Costs (ODCs) in the Price Proposal. The breakdown shall identify any “open market” items. The ***Attachment E – Equipment Support, Warranty and Inventory*** is provided for the offeror to store and track equipment records by the task order number. The [Agency] may also task the Offeror to store additional information in this file.

# Materials, Equipment and Facilities

The offeror shall meet and comply with the baseline general requirements for the management, maintenance, and handling of equipment and equipment services as described in **Section C.2.1 General Requirements** of the Connections II contract.

## Equipment Warranty and Inventory

Agency-specific requirements for equipment and facilities may be provided for each individual task. In addition, the offeror shall:

* Comply with **Section C.2.1.9: Warranty Service** of the Connections II contract to provide, at no additional cost to the Government, a minimum one-year system warranty, or the warranty provided by the Original Equipment Manufacturer (OEM) whichever is longer, for all hardware and software purchased under this order.
* Comply with **Section C.3.6: Inventory Management** of the Connections II contract to establish and maintain an Inventory File of equipment, equipment warranty, and maintenance services purchased under each of the Tasks. Each record of this file shall include the OEM’s name and contact number, the maintenance offeror’s name and local repair number, the date of acceptance, the date maintenance was performed (if available), a description of the maintenance action (if available), and the date that the warranty ends.

***Attachment E – Equipment Support, Warranty and Inventory*** is provided for the offeror to store and track equipment records by the task order number. The [Agency] may also task the Offeror to store additional information in this file.

## Government-Furnished

Government Furnished Property (GFP) which includes Government Furnished Material (GFM), Government Furnished Information (GFI), and Government Furnished Equipment (GFE) may be provided and shall be identified in the individual task order. The offeror shall be responsible for conducting all necessary examinations, inspections, maintenance, and tests upon receipt.

#### Government Furnished Equipment (GFE)

Upon the award and placement of each task order, Government Furnished Equipment (GFE) may be made available by the [Agency] for use by the offeror to support the tasks. The offeror shall use GFE to provide support services as mutually agreed upon by the offeror and Agency. The offeror shall evaluate all equipment as the Agency directs.

[Agency may add Agency-specific requirements here]

#### Government Furnished Information (GFI)

Site floor plans, specifications, and references will be provided by the COR. Site drawings, cable run sheets and complete technical documentation generated by the offeror, as well as documentation that was provided to the offeror by the COR or technical point of contact shall be delivered no later than thirty (30) work days to [Agency]’s POC following the completion of the project.

[Agency may add Agency-specific requirements here]

## Contractor-Furnished

#### Contractor Furnished Equipment (CFE)

All material and equipment identified on the network design package to accomplish this task will be furnished by the offeror. The offeror will purchase, ship, move, store, inventory, and handle installation material that is identified as CFE. Excess materials and prescribed spares shall be turned over to the COR at the completion of the project. Material turned over at the completion of the project shall be thoroughly documented including description, part numbers, and quantities.

[Agency may add Agency-specific requirements here]

#### Contractor Furnished Items (CFI)

The offeror shall identify in their proposal any items to be furnished during the performance of this task order.

## Facilities

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| This section may be removed if the requirements under this sub-section do not apply to this SOW. |

#### Contractor Facilities

Except for those items and services specifically stated above in Section 5.2 as Government-Furnished, the offeror shall furnish everything needed to perform this Contract according to all its terms and conditions as stated in specific sections of this SOW. Such property includes, but is not limited to, facilities, equipment, material, supplies, repair parts, vehicles, data processing equipment, safety clothing, identification system camera and badges, and timekeeping system and facilities.

[Agency may add Agency-specific requirements here]

#### Government Facilities

To the extent it is available and is technically adequate, government facilities shall be used within the Government buildings and support locations identified by the Agency in ***Appendix B – Support Locations***.

Where offeror equipment is required at the site, the Government will provide space, power, and HVAC. To the extent that uninterrupted power is available and required, it will be provided to the offeror by the Government. GFE may be used to satisfy this requirement if it is available.

[Agency may add Agency-specific requirements here]

#### Incidental Construction

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| Requirements for incidental and non-severable construction may be removed if it does not apply to this SOW.  The modification of a facility or space, raised flooring, alteration, addition or any construction work performed must not be a standalone task but rather it is incidental to the task order under this SOW and not a major task on its own.  Agency may add incidental and non-severable construction requirements here specific to their needs to support the solution. |

[Agency may add Agency-specific requirements here]

# Invoice Requirements

The offeror shall meet and comply with the Billing and Invoice requirements as described in **Sections C.3.4 Billing, G.5.1 General Billing Requirements, and G.6 Payment of Bills** of the Connections II contract. The baseline requirements for Connections II contract for Invoicing and Billing including the handling of Associated Government Fee, approval for payment of supplies/services, resolution of billing disputes, and the option for Agency to pay by electronic funds transfer shall apply.

## Detail Billing Requirements

The offeror shall comply with the detail billing requirements defined in **Section C.3.4** and the general billing requirements in **Section G.5** of the Connections II contract when submitting a proper bill for each order.

## Invoice Address, Data Format and Delivery Method

The offeror shall be capable of directly billing each customer at the address given by the Agency in the order and shall also have the capability to centrally bill designated customers through GSA. The baseline requirements for direct and centralized billing as defined **Section C.3.4** of the Connections II contract shall apply.

### Invoice Address

The offeror shall send invoices directly to the address (electronic mail or postal/physical address) designated by the Agency’s authorized Ordering Entity. This address will be determined at the time the order is placed.

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| An Agency can receive invoices by electronic (email method), hard copy, or both. Suggested Requirements:  The offeror shall provide the signed original invoice via email:  [Agency provide email address here]  The offeror shall also provide via postal/physical address an additional copy of the invoice to the Contracting Officer and COR or provide [n] copies of the signed original to:  Name of Agency Department  POC Name/Position and Title  Email  Mailing Address  Street, City, Zip  Inquiries regarding payment of invoices should be directed to [Agency provide email address here] |

### Invoice Submission

The offeror shall comply with the detail billing requirements defined in Section C.3.4 and the general billing requirements in Section G.5 of the Connections II contract when submitting a proper bill for each order.

A proper invoice must include the following items:

1. Contractor name and address

2. Contractor representative

3. Contract number

4. Order number(s)

5. Accounting Control Transaction (ACT) number (assigned by the OCO on the order)

6. Period of performance (month services performed for work request orders, month

deliverable completed for fixed price orders)

7. Bill number

8. Customer’s name and address

9. For Fixed Price Orders, products delivered and accepted, listed by deliverable number;

for Time and Materials orders, labor charges accepted during the period of performance

10. Travel and per diem charges

11. Total billed amount

12. Prompt payment discount offered (if applicable)

### Billing Cycle and Data Elements

The offeror shall invoice on a monthly basis. The invoice shall include the period of performance covered by the invoice. All labor, equipment, equipment services and unpriced items (other direct costs) shall be reported, and shall be provided for the current billing month and in total from project inception to date. If subcontracting is proposed, one consolidated invoice from the prime contractor shall be submitted in accordance with other terms and conditions of the RFQ.​

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| The Agency has option to specify the format and agency-specific data elements for invoice content.  Suggested Requirements:  The offeror shall provide the invoice data in spreadsheet form with the following detailed information.  The listing shall include separate columns and totals for the current invoice period and the project to date. The following data elements shall be provided on the Invoice, at a minimum:   1. Labor Type (Employee) 2. CONNECTIONS II labor category 3. Monthly and total cumulative hours worked 4. Burdened hourly labor rate 5. Cost incurred not billed |

### Electronic Funds Transfer (EFT)

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| Agency has option to specify the method of delivery for invoice and payments.  Insert additional agency-specific requirements here.    Below is a standard ‘boilerplate” requirements for EFT. |

The offeror shall cooperate with the government to allow payment of bills via Electronic Funds Transfer (EFT) to the extent feasible in accordance with **Section G.6.3 Use of Electronic Funds Transfer** of the Connections II contract.

## Billing for Other Direct Costs (ODCs) or Unpriced Item

The offeror may invoice monthly on the basis of cost incurred for ODC or unpriced item.  The invoice shall include the period of performance covered by the invoice and the item number and title.

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| Agency has option to specify the format and agency-specific data elements for ODC and unpriced items.  Suggested Requirements:  The offeror shall provide the following detailed information for each invoice submitted, as applicable.  Spreadsheet submissions, in MS Excel format, are required.   1. ODCs or unpriced items purchased 2. Date delivery accepted by the Government 3. ODC or unpriced item number 4. Project to date totals 5. Cost incurred not billed 6. Remaining balance of each item |

### Invoice for Travel Expenses

The offeror may invoice monthly on the basis of cost incurred for cost of travel comparable with the Joint Travel Regulations/Federal Travel Regulation (JTR/FTR).  Long distance travel is defined as travel over 50 miles.  The invoice shall include the period of performance covered by the invoice, and the CLIN number and title.  Separate worksheets, in MS Excel format, shall be submitted for travel.

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| Agency has option to specify the format and agency-specific data elements for submitting Travel charges. Suggested Requirements:  The offeror shall provide the following detailed information for each invoice submitted for travel expenses. The Total Cost for Travel shall identify all current travel on the project and their total CLIN/Task costs billed.  The listing shall include separate columns and totals for the current invoice period and the project to date:   1. Travel Authorization Request identifier, approver name, and approval date 2. Current invoice period 3. Names of persons traveling 4. Number of travel days 5. Dates of travel 6. Number of days per diem charged 7. Per diem rate used 8. Total per diem charged 9. Transportation costs (rental car, air fare, etc.) 10. Total charges 11. Explanation of variances exceeding 10% of the approved versus actual costs 12. Indirect Handling Rate. |

[Agency may add Agency-specific billing and invoice payment processing requirements here]

# Electronic and Information Technology Accessibility Standards (Section 508)

All Electronic and Information Technology (EIT) procured through this task order must meet the applicable accessibility standards at 36 CFR 1194, unless an Agency exception to this requirement exists. The Section 508 Standards Summary is viewable at: <https://www.section508.gov/index.cfm?fuseAction=stdsSum#technical>.

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

# Proposal Instructions

Offerors are expected to review, understand, and comply with all aspects of this Statement of Work. All proposals received by the closing date and time will be evaluated in accordance with the Evaluation Criteria in **Section 9.0: Evaluation Factors and Basis for Award**.

Questions and clarifications concerning this solicitation shall be submitted in writing via email to: name and email address, no later than Q&A Closing Date (MM/DD/YYYY).

## Solicitation Closing Date and Time

All proposals received by the deadline will be reviewed for responsiveness to the specifications outlined in these guidelines and the proposal format. Proposals which are submitted late or are incomplete run the risk of not being considered in the review process.

The proposals should be prepared according to the structural format set forth below. Proposals must be received at the place designated and by the due date specified herein, and must be considered valid for a period of [120] calendar days from the solicitation closing date.

PROPOSALS MUST BE RECEIVED ON OR BEFORE [3:00 PM EDT] ON <<RFP\_Closing\_Date>>.

Any proposal received by the [Agency] after the due date and time will not be considered.

## Preparation and Delivery Instructions

The Proposal shall be delivered to:

Provide the following:

POC Name/Title

Email

Phone

Additional instructions how proposals are to be submitted or delivered

The offeror’s proposal shall consist of individually titled separate volumes. Proposals shall be submitted in three separate volumes as shown below:

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| --- | --- | --- | --- |
| **VOLUME** | **VOLUME TITLE** | **FORMAT** | **PAGE LIMITATIONS** |
| **Vol. I** | **PRICE PROPOSAL** | **EXCEL** | **No page limit** |
| **Vol. II** | **TECHNICAL/MANAGEMENT PROPOSAL**   * **Technical approach** * **Management approach** | **PDF** | **[n] maximum number of pages** |
| **Vol. III** | **APPENDICES**   * **Project Management Plan (PMP)** * **Past Performance** * **Proposed Personnel** | **PDF** | **[n] maximum number of pages** |

The table above is an example that may be tailored based on Agency requirements.

The following requirements apply to volumes 2 and 3. Volume 1 (Price) must comply with the instructions found within the attached MS Excel workbook.

1. **FORMAT.** All materials shall be in typeface Times New Roman 11 point (or Arial 11 point), on 8-1/2 x 11” formatted pages with one inch margins all around. Tables and illustrations may use reduced font style but not less than 8-point. All material submitted may be single-spaced. **Each page must provide identification of the submitting offeror in the heading or footer.**
2. **MATERIALS SUBMITTED.** The offeror is advised that all submissions and related material become the property of the U.S. Government and will not be returned. The technical and price proposals, if accepted by the Government, will form binding parts of the task orders that results from this solicitation. Therefore, care must be taken to properly address the requirements set forth in this solicitation.
3. **PROPRIETARY DATA.** Each and every page of the offeror’s proposals must be reviewed and marked as to proprietary data content by the offeror in strict compliance with **FAR 52.215-1**. Also see **FAR 3.104-4**. A single blanket statement at the front of the proposal is not acceptable. Failure to mark every page will subject your proposal to public release through Freedom of Information Act (FOIA) requests.

## Price Proposal

The offeror shall submit its Price Proposal in the form of an MS Excel Workbook included as ***Attachment D – Pricing Template***. The Price Model is used to facilitate the delivery of prices in the required format. In populating all Excel worksheets, the offeror shall present the data (e.g., item number, unit prices, quantities, and summarized prices) in a manner where all computations can be traced to the maximum extent possible. The offeror may add rows, columns, or worksheets to accommodate the required pricing information.

The offeror must assemble a project team with the required knowledge and experience as described in **section 3**. Pricing for each type of labor shall be proposed in all 4 price types. Proposed Labor Types for each Task shall include the Labor Type description, work location type, business day type, clearance status, and minimum educational qualifications and years of work experience. The Proposed Labor Types for each Task shall be provided in ***Attachment D – Pricing Template.***

For each Labor Type proposed, the offeror shall provide fully loaded hourly labor pricing based on the following price types:

1. Hourly Onsite (on government premises), Normal Business Day
2. Hourly Offsite (on contractor premises), Normal Business Day
3. Hourly Top Secret - TS/SCI, Onsite, Normal Business Day
4. Hourly Top Secret - TS/SCI, Offsite, Normal Business Day

The technical support services required at the government-site are described and identified in ***Attachment B – Support Locations.*** Work locations are defined as Government or offeror sites:

* + - 1. **Government site**: The Offeror shall provide technical support and equipment when required to the locations identified in ***Attachment B – Support Locations***.
      2. **Offeror site:** The Offeror shall provide network and security operations support and monitoring when required, and this work may be performed at the Offeror’s NOC and Security Operations Center (SOC), respectively.

Failure by the offeror to use the prescribed pricing template may result in non-compliance. The Price Proposal must be submitted under separate cover from the Technical Proposal. While there is no page limit for the Price Proposal, the offeror must provide the necessary detail and supporting information to address the solicitation requirements and to allow a complete analysis of each line item price.

## Technical/Management Proposal

The **Volume II Technical/Management Proposal** shall include the technical approach and management approach (including the draft ALTP) as described below. Technical/Management Proposals are limited to [n] pages in length and shall be written in English. Each page must be numbered consecutively. Pages that exceed the page number limitation will not be evaluated.

Any page in the Technical/Management Proposal that contains a table, chart, graph, etc., not otherwise specifically excluded below, is included within the above page limitation for the Technical Proposal. Not included in the page limitation are the following:

* Cover/title page
* Table of contents

The offeror must organize its response in the Technical/Management Proposal to contain the following.

**Executive Summary** (5-page size limit)

The Executive Summary shall summarize the key elements of the offeror’s strategy, approach, methodologies, personnel and implementation plan. The Executive Summary must not exceed 5 pages in length.

**Technical Approach**

The Technical Approach must demonstrate a clear understanding of the requirements and include a description of the overall approach and strategy (i.e., implementation plan, testing methodology and risk mitigation strategy) being proposed.

* The Technical Approach must demonstrate a proven process well-versed in the transition planning requirements to manage the risk of service disruption and errors. The offeror shall demonstrate experience and technical skills in delivering a solid management process methodology and approach to managing complex large scale implementations.
* The Technical Approach shall include a detailed description of the offeror’s technical solution for each task including the associated equipment, equipment services, labor, and installation, and addressing each paragraph and subparagraph of Section 2.0: Statement of Work. If the offeror simply restates the requirements in Section 2.0 of this solicitation, the offeror’s proposal will be removed from consideration for award.

The Technical Approach shall be organized by the technical evaluation criteria for “Factor 1 – Technical Approach” listed in **Section 9.3** and shall meet and comply with all requirements in this SOW. Marketing literature is not acceptable. The offeror must stipulate that it has read, understands and will meet the Government’s requirements.

**Management Approach**

The offeror’s Management Approach shall provide a summary of the draft Project Management Plan (see instructions for Appendices) and the rationale behind the selected organization and staff chosen. The plan shall also demonstrate that the offeror has the corporate capabilities to execute the submitted PMP. The Management Approach shall also include the draft ALTP as required in section 2.2.5.

## Appendices

**Project Management Plan (no size limit)**

The offeror shall submit a draft Project Management Plan (PMP) based on its proposed technical approach using ***Attachment A - PMP Template***. The offeror’s PMP will be evaluated as part of Technical/Management. The PMP shall be submitted as an Attachment with no size limit.

The offeror shall identify in the Project Management Plan, by name and by roles and responsibilities, the proposed key personnel (i.e., the key management and technical personnel who will work under this order). The core project team should be composed of qualified professionals with strong technical backgrounds and experience in designing large, complex voice network configurations.

**Past Performance**

Offerors shall submit the following information as part of their proposal:

1. The offeror shall describe its past performance directly related to contracts it has held within the last 5 years that are similar in scope, magnitude and complexity. Offerors shall provide a minimum of three (3) relevant examples. There is no maximum number of examples that can be provided.
2. The offeror shall provide relevant past performance documentation and references for services comparable to those described in the SOW. Past performances listed may include those entered into by the Federal Government, state and local government agencies, and commercial customers.
3. The offerors shall notify each of their private-sector (commercial) references that they may be contacted by the [Agency] and authorize them to provide the past performance information requested. References other than those identified by the offeror may be contacted by the Government, and the information received from them may be used in the evaluation of the offeror’s past performance.

The offeror shall provide with the proposal a summary of the required past performance information. The offeror shall provide the information using the worksheet provided in **Attachment F – Past Performance Worksheet**.

**Proposed Personnel**

The offeror shall describe the skills, qualities and capacities of its proposed Project Manager and other key personnel to meet both the minimal qualifications described in **Section 3.0** as well as their ability to meet the technical and implementation challenges of the proposed implementation approach.

The offeror shall include the resumes for all the proposed key personnel candidates and other long-term technical experts, up to a total number of [n]. Key personnel resumes may not exceed [n] pages in length and shall be in chronological order starting with most recent experience.

Each resume shall be accompanied by a signed letter of commitment from each candidate indicating his/her: (a) availability to work in the stated position, in terms of months; after award; and (b) intention to support and work for a stated term of the service. The offeror's proposed personnel shall also submit a minimum of three (3) references of professional contacts within the last three years. The offeror should provide a current phone, fax address, and email address for each reference contact.

If the Agency has additional proposal instructions above and beyond the instructions stated in this SOW, they may be provided in this section. An Agency is not required to use any of the instructions contained herein.

# Evaluation Factors and Basis for Award

The Government will evaluateeach of the offeror’s proposals to determine if the support services offerings satisfy the specific requirements under each task. The evaluations will be based on the evaluation factors defined in this section.

## Evaluation Methodology and Basis for Award

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| **SUGGESTED EVALUATION LANGUAGE**  **(Agency may remove or modify the narratives below)**   1. The Government may award a contract based on the initial proposal without discussions or negotiations with offerors, in accordance with **FAR 52.215-1**. Therefore, it is important that each proposal be fully compliant, without exception to any requirement, clause or provision. Offerors should submit initial proposals which respond most favorably to the SOW’s requirements. 2. The Government intends to evaluate offerors’ proposals in accordance with **Section 8.0** of this Request for Proposal and make a contract award to the responsible offeror whose proposal represents the best value to the U.S. Government. 3. The Technical Proposal will be evaluated by a technical evaluation committee using the technical criteria shown below. 4. Price has not been assigned a numerical weight. Offerors are reminded that the Government is not obligated to award a negotiated contract on the basis of lowest proposed price, or to the offeror with the highest technical evaluation score. Agencies must state the following when using tradeoff process: ‘The solicitation shall state whether all evaluation factors other than cost or price, when combined, are significantly more important than, approximately equal to, or significantly less important than cost or price.’ 5. As technical scores converge, price may become a deciding factor in the award. Therefore, after the final evaluation of proposals, the contracting officer will make the award to the offeror whose proposal offers the best value to the Government considering both technical and price factors. |

## Evaluation Approach – Trade Off or LPTA

Note: The Agency is required to select either Trade off or LPTA Approach. Once a method has been selected, delete all information in this SOW relevant to the method that was NOT selected.

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| **SUGGESTED EVALUATION LANGUAGE**  **IF TRADE OFF APPROACH**  **IS SELECTED BY THE AGENCY**  **(Agency may remove or modify the narratives below)**  The Government anticipates awarding a task order to the offeror whose proposal represents the best value, price and other factors considered.   1. The Government intends to evaluate proposals and may award a contract without discussions. However, the Government reserves the right to conduct discussions if determined by the contracting officer to be necessary. Therefore, each initial offer should contain the offeror’s best proposal from both a price and a technical standpoint. 2. Proposals received in response to this solicitation will be evaluated by the [Agency] in accordance with FAR 15.101-1 and **FAR 52.215-1**, and as set forth in **Section 8.0: Proposal Instructions**, one award will be made by the Contracting Officer to the responsible offeror whose proposal, conforming to the solicitation, is determined most advantageous to the Government, all technical and price factors considered. 3. The formula set forth herein will be used by the contracting officer as a guide in determining which proposals will be most advantageous to the Government. |

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| **SUGGESTED EVALUATION LANGUAGE**  **IF LOWEST PRICE TECHNICALLY ACCEPTABLE (LPTA) APPROACH**  **IS SELECTED BY THE AGENCY**  **(Agency may remove or modify the narratives below)**  Award will be made to the offeror whose proposal represents the lowest price technically acceptable as defined in **FAR 15.101-2**. The offeror’s proposal will be evaluated with regard to its ability to meet the tasks set forth in the SOW. To result in an award, the offeror’s proposal must demonstrate the ability to satisfy all technical requirements as set forth in the attached Statement of Work, and must conform to all required terms and conditions.  Lowest price technically-acceptable source selection process.   * + 1. The lowest price technically-acceptable source selection process is appropriate when best value is expected to result from selection of the technically-acceptable proposal with the lowest evaluated price.     2. When using the lowest price technically-acceptable process, the following apply:        1. The evaluation factors and significant sub-factors that establish the requirements of acceptability shall be set forth in the solicitation.        2. Solicitations shall specify that the award will be made on the basis of the lowest-evaluated price of proposals meeting or exceeding the acceptability standards for non-price factors.        3. If the Contracting Officer decides that past performance does not need to be evaluated, the Contracting Officer will document the file pursuant to FAR 15.304(c)(3)(iii)..        4. If the Contracting Officer elects to consider past performance as an evaluation factor, it shall be evaluated in accordance with FAR 15.305(2). However, the comparative assessment in 15.305(a)(2)(i) does not apply.        5. If the Contracting Officer determines that the past performance of a small business is not acceptable, the matter shall be referred to the Small Business Administration for a Certificate of Competency determination, in accordance with the procedures contained in subpart and U.S.C. 637(b)(7).     3. Proposals are evaluated for acceptability but not ranked using non-price factors. |

## Technical Evaluation Criteria

The Government will review the responses to this solicitation to ensure that offerors have addressed the requirements for Tasks 1-9 and are sufficient in detail and clarity to allow the Government to determine whether the proposed support services, equipment, and equipment services are acceptable, or if the Government desires to enable the Agency Contracting Officer to identify items for discussions.

The Government will evaluate the [offerors] offeror’s proposal based upon the following four factors: technical approach, project management, proposed personnel, and past performance*.* Within these factors, the Government will evaluate the sub-factors identified below. To achieve an acceptable rating, the offeror’s Technical Proposal must achieve a pass rating on all sub-factors.

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| The Agency is required to develop a source selection / technical evaluation plan to describe how each of these factors will be rated. Depending on the approach used, the Source Selection Plan/Technical Evaluation Plan (SSP/TEP) may select an adjectival rating system, a points system, or any other approved system. |

The Government will evaluate offerors’ Technical Proposals as described below:

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| **TECHNICAL EVALUATION CRITERIA** |
| **Factor 1: Technical and Management Approach** |
| Sub-factor 1: Project Management |
| Sub-factor 2: Organizational Structure and Chart |
| Sub-factor 3: Transition Support Expertise |
| **Factor 2: Proposed Personnel Qualifications/Certifications** |
| Sub-factor 4: Program/Project Manager |
| Sub-factor 5: Key Technical Personnel |
| **Factor 3: Past Performance** |
| Sub-factor 6: Past Performance History/Track Record |

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| **SUGGESTED EVALUATION LANGUAGE**  **FOR TECHNICAL EVALUATION OF TECHNICAL CRITERIA**  **PLEASE NOTE: The standard for evaluation is usually reserved for the SSP/TEP, however an agency may choose to disclose this information in the RFQ/RFP**  **(Agency may remove or modify the narratives below)**  The following evaluation criteria will serve as the standard against which all proposals will be evaluated and will serve to identify the significant discussion items that offerors should address in their proposals. The factors and sub-factors are presented below. Sub-factors are listed in descending order of importance, showing the evaluation weighting for each.   1. **Factor 1: Technical and Management Approach**   The extent to which the proposal demonstrates a clear understanding of the statement of work and the degree to which the proposed implementation approach is technically and managerially sound and likely to meet the objectives of the managed voice solution as described in this solicitation. The technical approach must be realistic, directly relevant to the achievement of results and must seek to maximize results within budget resources. The technical approach must describe the Offeror’s plans for achieving the goals of each of the Tasks laid out in the SOW.  The Agency will evaluate the proposed best practices and innovations for reasonableness, realism, and the effectiveness of quantified efficiencies. The Agency will evaluate any assumptions and underlying rationale associated with those assumptions for reasonableness.  **Sub-factor 1: Program Management** - The Agency will evaluate for adequacy, effectiveness, realism, and relevancy, the offeror’s proposed responsibilities (such as workflow, staffing) and authorities for program management of this contract. This evaluation will consider the offeror’s proposed approach to resolving internal conflicts over resources with other company organizations, degree of autonomy of the Program Executive, and lines of communication among Agency, Contractor, and subcontractor.  **Sub-factor 2: Organizational Structure and Chart** - The Agency will evaluate the realism, effectiveness, and efficiency of the offeror’s proposed organizational structure, including policies, procedures, and techniques for managing the proposed work to include subcontractors. This evaluation will include the offeror’s approach to quality management of the required services through surveillance, organizational structure, staffing and utilization and distribution of the workforce in meeting contract requirements, cost constraints, and schedules.  **Sub-factor 3: Transition Support Expertise -** The Agency will evaluate for effectiveness, efficiency, timeliness, and realism of the offeror’s approach to support multiple, simultaneous efforts that may have competing requirements for technical expertise, timelines and delivery schedules that will be supported.  This evaluation will include:   * assessing the offeror’s approach to developing and maintaining technical capabilities and competencies * providing support throughout the duration of the contract * assigning work in a changing, dynamic, and evolving technical environment. * Assessment of the draft ALTP   The Agency will also evaluate for effectiveness how the offeror will implement delivery schedule management, identifying and managing risk, quality assurance, and obtaining user feedback for performance improvement.  The offeror’s approach to identifying industry process models, best practices, and performance standards applicable to life cycle management (including transition to attain service levels specified in the SOW)   1. **Factor 2: Proposed Personnel Qualifications/Certifications**  * **Sub-Factor 5: Project Manager/Program Manager** – The proposed Project Manager/Program Manager shall demonstrate the qualifications and ability to successfully lead this project, including the ability to work constructively at multiple levels of organizations, including senior levels of Government and business. The Resume of Project Manager will be evaluated against these criteria. * **Sub-Factor 6: Key Personnel** – The members of the proposed project team, including subject-matter experts (SMEs), shall demonstrate the experience and ability to successfully meet the project milestones, targets, and goals.The Resumes of Key Personnel will be evaluated against these criteria.  1. **Past Performance**  * **Sub-Factor 7: Past Performance** information will be used for both the responsibility determination and best value decision. The offeror and major subcontractor(s) past performance will be evaluated. A major subcontractor (if applicable) is defined as a subcontractor named in the proposal whose total price exceeds 15% of the offer’s bottom line total price, including fixed fee. * The submitted performance worksheet will be evaluated against these criteria. Likewise, the contracting officer will also utilize existing database of offeror performance information (i.e. PPIRS) and solicit additional information from the references provided in this SOW and from other sources if and when the contracting officer finds the existing databases to be insufficient for evaluating an offeror’s performance. The [Agency] may use performance information obtained from other than the sources identified by the offeror/subcontractor. |

## Price Evaluation Criteria

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| **SUGGESTED EVALUATION LANGUAGE**  **FOR PRICE EVALUATION CRITERIA**  **(Agency may remove or modify the narratives below)**   1. No points are assigned to the price proposal evaluation. While the technical evaluation criteria are significantly more important than price, price remains important. 2. Price will primarily be evaluated for realism, allow-ability, and reasonableness. 3. This evaluation will consist of a review of the price portion of an offeror’s proposal to determine if the overall price proposed is realistic for the work to be performed, if the price reflects an accurate understanding of the requirements, and if the price is consistent with the Technical Proposal. 4. Evaluation of the price proposal will consider but not be limited to the following:  * Price reasonableness, price realism and completeness of the price proposal and supporting documentation * Overall price control/price savings evidenced in the proposal (avoidance of prices that exceed reasonable requirements) * The amount of the proposed fee, if any  1. Price realism is an assessment of the accuracy with which proposed prices represent the most probable cost of performance, within each Offeror’s technical and management approach. A price realism evaluation shall be performed as part of the evaluation process as follows:  * Verify the offeror’s understanding of the requirements * Assess the degree to which the price proposal accurately reflects the technical approach * Assess the degree to which the prices included in the Price Proposals accurately represent the work effort included in the respective Technical Proposals  1. The results of the price realism analysis will be used as part of the Agency’s best value/tradeoff analysis. 2. Although technical evaluation criteria are significantly more important than price, the closer the technical evaluation scores of the various proposals are to one another, the more important price considerations will become. The evaluation of proposed prices may therefore become a determining factor in the award as technical scores converge. |

# Task Order Award

The Task Order Award will be made to the responsible Offeror whose proposal is in the best interest of the [Agency], given the outcome of the [Agency]’s evaluation of each Offeror’s technical excellence, management and business risk factors, and proposed price. In selecting the Task Order Award, the [Agency] will consider the quality offered for the evaluated price. The relative quality of offers will be based upon the [Agency]’s assessment of the tradeoffs between the technical excellence offered in the Offeror’s proposal and whether it provides added value, added capability, and/or reduced management and business risk.

# Organizational Conflicts of Interest

The guidelines and procedures of **FAR Subpart 9.5** will be used in identifying and resolving any issues of organizational conflicts of interest at the task order level. (*Refer to* ***Section H.8 Organizational Conflicts of Interest*** *of the Connections II contract*).

In the event that a task order requires activity that would create or has created an actual or potential conflict of interest, the offeror shall:

* Notify the task order Contracting Officer (CO) of the actual or potential conflict, and not commence or continue work on any task order that involves a potential or actual conflict of interest until specifically notified by the task order CO to proceed.
* Identify the conflict and recommend to the task order CO an alternate tasking approach which would avoid the conflict.

If the task order CO determines that it is in the best interest of the Government to issue or continue the task order, notwithstanding a conflict of interest, a request for waiver shall be submitted in accordance with **FAR 9.503**.  In the event that the offeror was aware of facts required to be disclosed or the existence of an actual or potential organizational conflict of interest and did not disclose, when known, such facts or such conflict of interest to the task order CO, the Government may terminate this contract for default.

In the event that a task order issued under this contract requires the offeror to gain access to proprietary information of other companies, the offeror shall be required to execute agreements with those companies to protect the information from unauthorized use and to refrain from using it for any purpose other than for which it was furnished.

# Acronyms and Glossary of Terms

## Acronyms and Definition

| **Acronym** | **Definition** |
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| ALTP | Agency Level Transition Plan |
| CCB | Change Control Board |
| CPE | Customer Provided Equipment |
| CSU/DSU | Channel Service Unit/Data Service Unit |
| EFT | Electronic Funds Transfer |
| EOL | End of Life |
| FISMA | Federal Information Security Management Act |
| LAN | Local Area Network |
| LGC | Local Government Contact |
| MAD | Moves, add, changes, disconnects |
| MPLS | Multiprotocol Label Switching |
| NOC | Network Operations Center |
| PERT | Program (or Project) Evaluation and Review Technique |
| POC | Point of Contact |
| PRI | Primary Rate Interface |
| QASP | Quality Service Assurance Plan |
| QoS | Quality of Service |
| RDS | Required Data Set |
| SLA | Service Level Agreement |
| SME | Subject Matter Experts |
| SOW | Statement of Work |
| SSP | Source Selection Plan |
| SWC | Serving Wire Centers |
| T1 | Transmission System 1 |
| TEP | Technical Evaluation Plan |
| TP | Transition Plan |
| TSP | Telecommunications Service Priority |
| VoIP | Voice over Internet Protocol |
| WAN | Wide Area Network |
| WBS | Work Breakdown Structure |

## Glossary of Terms

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| **Glossary of Terms** | **Description** |
| **Internet Protocol Private Branch eXchange (IP PBX)** | A telephone switch that natively supports voice over IP (VoIP). An IP PBX uses VoIP-based protocols to communicate with IP-based hosts such as VoIP telephones over a packet-switched network. Some IP PBXs can also support the use of traditional analog and digital phones. |
| **Loopback or loop-back** | Refers to the routing of electronic signals, digital data streams, or flows of items back to their source without intentional processing or modification. This is primarily a means of testing the transmission or transportation infrastructure. |
| **Private Branch eXchange (PBX)** | A private telephone network in an organization. Individual telephone numbers or extension numbers are supported, and calls are automatically routed to them. Users can call each other using extensions, even across distributed locations. |
| **Telecommunications Service Priority (TSP)** | A program that authorizes national security and emergency preparedness (NS/EP) organizations to receive priority treatment for vital voice and data circuits or other telecommunications services. The TSP program provides service vendors a Federal Communications Commission mandate to prioritize requests by identifying those services critical to NS/EP. A TSP assignment ensures that it will receive priority attention by the service vendor before any non-TSP service. |
| **Transmission System 1 (T-1)** | T-1 is a hardware specification for telecommunications trunking. A trunk is a single transmission channel between two points on the network: each point is either a switching center or a node (such as a telephone). |

# Attachments

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| Double-clicking the attachments may produce the error "Word cannot start the converter mswrd632.wpc," which is a known Microsoft issue (http://support.microsoft.com/kb/973904). Microsoft provides the following workaround: right-click on the embedded attachment (instead of double-clicking) and then select "Document Object" and then use "Open" (instead of "Convert") from the pop-up menu. |

## Attachment A – Project Management Plan



## Attachment B – Support Locations

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## Attachment C – Pricing Requirements

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## Attachment D – Pricing Template



## Attachment E – Equipment Support, Warranty and Inventory



## Attachment F – Past Performance Worksheet



## Attachment G – Task Order Deliverables Performance Matrix



## Attachment H – Network Diagrams and Figures



## Attachment I – Cutover Task List

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## Attachment J – Transition Inventory Report



1. A Freeze Period means no new orders, change orders, moves or adds orders are allowed until the transition is completed. [↑](#footnote-ref-2)