

STATEMENT OF WORK

1.0 BACKGROUND

Mayor Adrian Fenty came in office in January 2007 and has a vision and plan to improve the District of Columbia in the following core areas:

1. Education
2. Public Safety
3. Public Health
4. Human Services
5. Infrastructure and Environment
6. Operations
7. Economic Development and Affordable Housing

The mission of the District Government is to manage essential services in a continually more efficient and responsive manner, employing high-quality professionals and implementing smart policies, procedures and metrics that reflect the great potential our city possesses. Above all, starting with the Mayor, government will be held accountable to its stakeholders: The citizens of the District of Columbia. The District Government must be transparent and accountable to its stakeholders.

The Office of the Chief Technology Officer (OCTO) is challenged to support the above Mayoral core focus areas by selecting technologies that have the greatest potential for improving the overall effectiveness and efficiency of the District government. OCTO's goal is to implement systems that are reliable, scalable, feature rich and that support the District's business strategies and constituencies' needs. To achieve these results, OCTO needs collaboration among all stakeholders in setting strategic direction, maintaining a District-wide perspective, and judiciously selecting technologies of the greatest benefit. Facilitating these efforts is the role of the Office of the Chief Technology Officer. Assisting OCTO will be a Management and Technology Consulting firm with practices and staff who have proven success with technology strategy, assessment, transformation and implementation in the specific areas the Mayor's Office is targeting.

2.0 SCOPE

The Office of the Chief Technology Officer (OCTO) develops and enforces policies and standards for information technology in the District government. OCTO identifies where and how technology can systematically support the business processes of the District's 68 agencies. Agencies can draw on OCTO's expertise to get the most out of their technological investments. OCTO must ensure that all IT projects are serving a clear and defined need, align with the Mayoral objectives, meet the needs of the stakeholders and customers, projects are within budget and properly managed.

OCTO also assesses new and emerging technologies to determine their potential application to District programs and services. Finally, OCTO promotes the compatibility of computer and communications systems throughout the District government.

OCTO is seeking a contractor to do detailed assessments of the District governments IT operations in various areas of the government including education, public safety and public health. The goals of the assessments are to analyze areas of strengths and weaknesses in IT projects, technologies, strategies, processes, metrics and methodologies.

OCTO needs a contractor to provide an objective look at the dependability and quality of technologies, IT structure within OCTO and other government agencies, assess the quality of application projects, applications under development and the processes used to develop the applications.

The contracting firm must provide:

- Expertise in management consulting, application development, database/data Warehouse, network and infrastructure.
- Expertise in change management, program management, project management, business analysis, technology assessment, IT strategy and implementation.
- Expertise in requirements gathering and business process reengineering.
- A proven and formal methodology/framework for performing large scale assessments.
- Experienced consultants whose leaders have careers spanning at least 10 years in IT project/program management services.
- Certified LSDBE.
- Proven ability to scale staff according to demand.
- Proven experience in Public Sector, Education and Healthcare industries.
- Methodology that accounts for knowledge transfer, and client self-sufficiency from the beginning of the engagement to actual turn-over.
- A company who can best represent OCTO, it's goals and culture, as it works with all the departments and staff.
- Proven track record working with the District Government and multiple District agencies.
- Recommendations and improvements (as appropriate) to the operations of DC agencies.
- Recommendations for future development of District information technologies to support workflow efficiencies and provide the District Constituents with useful technology.
- Minimum of 3 recent engagements for clients in the commercial, government and public sectors for which similar assessments have been conducted.
- Examples of actionable recommendations that have been acted upon and have yielded the desired outcomes of prior clients.
- Examples of professional services that bring clients the necessary experience and objectivity to provide sound, unbiased assessments and recommendations.
- Examples of contractor's experience in the public sector demonstrates that the contractor understands the challenges facing organizations such as the District of Columbia Department of Health as well and ways to improve its IT operations for long-term success.
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3.0 PROJECT DELIVERABLES

The deliverables during the project will be as follows:

- 1) Weekly status reports
- 2) Meeting minutes
- 3) Process Maps (As Needed)
- 4) Project Plan
- 5) Project/Program Assessment Documents
- 6) Reports (As Needed)
- 7) Strategic Evaluations
- 8) Improvement Strategies

4.0 DELIVERABLE ACCEPTANCE CRITERIA

The general criteria for deliverable acceptance shall be in accordance with the following:

- a. This project will not be deemed complete until all of the deliverables as identified in section 3.0 are complete and approved by OCTO.
- b. The contractor shall produce all deliverable products as specified in the statement of work (SOW), unless otherwise instructed by OCTO, in writing.
- c. Written documents shall be delivered as follows: **three (3) original copies and one (1) electronic copy unless otherwise specified for the applicable deliverable.** The copy shall be in Microsoft Word or PowerPoint and transmitted on an electronic medium such as e-mail, CD-ROM, or diskette. Planning documents (Project Management Plan, Status Reports, etc.) shall be a combination of Microsoft Word, Microsoft Excel and Microsoft Project. Presentations shall be in Microsoft PowerPoint.
- d. OCTO shall have seven (7) business days to review each deliverable and accept or reject the deliverable in writing, with a written description of all discrepancies for correction by the contractor. The contractor shall resubmit corrected deliverables to OCTO within five (5) working days

5.0 QUALITY ASSURANCE AND STATUS REPORTING

The Contractor shall provide verbal and written communications in the form (and number of copies) requested by the designated District representative. Timely, complete and satisfactory provision of such reports by the Contractor to the District shall be a condition precedent to payment of the contractor. The Contractor shall:

- a. Complete tasks, milestones and/or deliverables identified in the statement of work and project plan and document progress in progress reports and relevant Quality Assurance Plan documents.
- b. Schedule key project staff to attend, either in person or via teleconferencing, weekly status meetings (or on other schedule, as appropriate) with the OCTO representatives.
- c. Continuously communicate status of the work relative to the approved schedule. The Contractor shall notify the OCTO Project Manager of any potential problems in meeting scheduled deliverable dates.
- d. Prepare written weekly status reports for the OCTO Project Manager. The report shall include a list of accomplishments during the reporting period, including completed and work in progress items; accomplishments planned for the next reporting period; identification of issues requiring management attention, including notification of any potential schedule slippage for deliverables and causes, as well as proposed corrective action.
- e. Provide weekly timesheets and summary of hours expended and remaining by Task.

6.0 GENERAL TERMS AND CONDITIONS

Weekly status updates to project plans and hours are mandatory.

- A Vendor provides, at no cost to the District, personnel with their own laptops and workstations that are compatible with the District LAN system. All laptops that are used on the District network are required to have up to date anti-virus software.
- B Rates will include travel and living expenses.
- C Follow direction of OCTO Project Manager, unless the representative expressly assigns a designee.
- D Promptly implement directives from the District's authorized representative to make minor modifications, additions and/or deletions to any portion of this scope of work. However, immediately advise the District in writing of any cost or schedule impact that may result from such District-issued directives. If Contractor determines that there is additional cost or schedule slippage resulting from the directive, Contractor shall not act upon the directive, and shall not deviate from the approved plan, until the District issues a written change order. Contractor shall not act upon any verbal directive that materially changes any aspect of this scope of work, irrespective of the source of such directive.

- E Assign a senior manager as Contractor's chief representative for this project. This representative shall have the authority to make binding decisions between its organization and the other team members. S/he will be in charge of all members of the Contractor team assigned to the project and will be the main contact. All correspondence, conferences, meetings and questions concerning the project directed to the Contractor and its subcontractors will be through this person. This representative will be personally available at all times during working hours from the beginning of the work through its completion.
- F Under time-and-material work
 - a. Before any person on Contractor's staff may commence charging time to project under time-and-material terms (either base contract or change orders), submit resume material to District and obtain approval for assignment of such personnel. Utilize the District's "Staff Nomination" form for this purpose. The form will be provided upon award.
 - b. Contractor may not invoice for more than 176 hours per month per person, or 8 hours per day, per person unless express written authorization is received from the District.
 - c. The District may request certified accounting records indicating the actual quantity of hours and other costs charged to this contract.
 - d. The contractor shall provide a report every two weeks, indicating Contractor's estimated costs to date, estimated cost to complete (ETC) and Contractor's estimate of the cost of the work at completion (EAC).
- G The District may direct Contractor to remove any Contractor staff that District finds unacceptable, and Contractor shall immediately remove (and replace with new individual(s) satisfactory to District, if requested) such personnel.
- H Prepare detailed agenda and minutes of meeting for all meetings called by Contractor. Such agendas shall identify in detail the specific items planned for discussion, and shall be distributed to proposed attendees well in advance of affected meetings. Such minutes are to set out responsible parties for action items; particularly decisions required by the District, including deadlines therefore, and the minutes shall record decisions made and the basis for each such decision.
- I Any and all Contractor-produced work products and deliverables, including all documents, graphics and software that are produced by Contractor in connection with this scope of work become the exclusive property of the Government of the District of Columbia. Contractor, by acceptance of this scope of work, provides an exclusive and infeasible license and copyright for unlimited use, copy and distribution by the District of subject work products and deliverables, in hard copy and/or soft copy (e.g. electronic, magnetic recording, etc.) form. Contractor shall deliver to the District camera-ready hard copies and soft copies (on 3.5" diskette or CD-ROM) of all such work products and deliverables within 5 business days of completion.