

GOVERNMENT OF THE DISTRICT OF COLUMBIA REQUEST FOR TASK ORDER PROPOSALS <i>Offeror to complete blocks 4, 15, 18A, 22, 23, 24, 29A, 29B & 29C</i>				1. REQUISITION NUMBER RK115568		Page of Pages 1 of 30	
2. TASK ORDER AGREEMENT NO. <i>See Task Order After Award</i>		3. Award/Effective Date <i>See Block 30C of Task Order After Award</i>	4. CONTRACT NUMBER <i>Contractor's GSA Contract</i>	5. Solicitation No. DCCB-2019-T-0012		6. SOLICITATION ISSUE DATE March 1, 2019	
7. FOR SOLICITATION INFORMATION CONTACT: Janice.Watson@dc.gov 		A. NAME OAG.businessopportunities@dc.gov		B. TELEPHONE (No Collect Calls) 202.442.9882		8. OFFER DUE DATE: 10:00 A.M. April 1, 2019	
9. ISSUED BY Office of the Attorney General Support Services Division/Procurement Unit 441 4th Street NW, Suite 1100 South Washington, DC 20001-2714			10. THIS ACQUISITION IS <input type="checkbox"/> UNRESTRICTED <input type="checkbox"/> SET ASIDE 100% OR <input type="checkbox"/> SMALL BUSINESS <input type="checkbox"/> SMALL DISADV. BUS. <input checked="" type="checkbox"/> 8(A) <input checked="" type="checkbox"/> GSA <input type="checkbox"/> DCSS SIC: SIZE STANDARD:		11. DELIVERY FOB DESTINATION UNLESS BLOCK BELOW IS MARKED <input checked="" type="checkbox"/> SEE SCHEDULE <input type="checkbox"/> 13. RESERVED		12. PAYMENT DISCOUNT TERMS Net 30 days _____% ____ days
15. CONTRACTOR / OFFEROR <i>Completed by GSA Contractor (Include name, address, phone, fax, email)</i>			16. PAYMENT WILL BE MADE BY Office of Finance and Resource Management Attn: Accounts Payable 441 4th Street NW, Suite 890 North Washington, DC 20001-2714				
15.A DUNS CODE			15.B TAX ID NO.				
17. DELIVER TO Office of the Attorney General Child Support Services Division 441 4 th Street NW, Suite 550 North Washington, DC 20001-2714			18. ADMINISTERED BY Same as Block 17				
18A. CHECK IF REMITTANCE IS DIFFERENT AND PUT SUCH ADDRESS IN OFFER <input type="checkbox"/>				18.B SUBMIT INVOICES TO ADDRESS SHOWN IN BLOCK 16 UNLESS BLOCK BELOW IS CHECKED <input type="checkbox"/> SEE ADDENDUM			
19. ITEM NO.	20. SCHEDULE OF SUPPLIES/SERVICES			21. QUANTITY (Estimated)	22. UNIT	23. UNIT PRICE	24. AMOUNT (21X23)
	The Office of the Attorney General (OAG) for the District of Columbia is seeking an experienced contractor to perform BUSINESS PROCESS RE-ENGINEERING of its Child Support Services Division in accordance with the Statement of Work (SOW) on pages 3-4. See PRICE SCHEDULE ON PAGE 2.						
25. ACCOUNTING AND APPROPRIATION DATA ENCUMBRANCE CODE: See FY19 PO _____					26. TOTAL AWARD AMOUNT (For Govt. Use Only)		
26. CONTRACTOR IS REQUIRED TO SIGN THIS DOCUMENT AND RETURN AN ORIGINAL AND 2 COPIES TO THE ISSUING OFFICE. CONTRACTOR AGREES TO FURNISH AND DELIVER ALL ITEMS SET FORTH OR OTHERWISE IDENTIFIED ABOVE AND ON ANY ADDITIONAL PAGES SUBJECT TO THE TERMS AND CONDITIONS SPECIFIED HEREIN.				28. AWARD OF CONTRACT: REFERENCE YOUR OFFER DATED _____ YOUR OFFER ON SOLICITATION (BLOCK 5) INCLUDING ANY ADDITIONS OR CHANGES WHICH ARE SET FORTH HEREIN, IS ACCEPTED AS TO ITEMS:			
29A. SIGNATURE OF OFFEROR /CONTRACTOR				30A. DISTRICT OF COLUMBIA (SIGNATURE OF CONTRACTING OFFICER)			
29B. NAME AND TITLE OF SIGNER (Type or Print)		29C. DATE SIGNED		30B. NAME OF CONTRACTING OFFICER (Type or Print)		30C. DATE SIGNED	

SECTION B

The District contemplates award of a firm-fixed price contract with a labor hour component. The Offeror shall propose prices in the following

PRICE SCHEDULE

19. ITEM NO.	20. SCHEDULE OF SUPPLIES/SERVICES	21. QUANTITY	22. UNIT	23. UNIT PRICE	24. AMOUNT (21X23)
	Child Support Business Process Re-Engineering Services in accordance with the Statement of Work, SECTION C.				
0001	Project Planning and Initiation as described in C.4.1 - C.4.3	One (1)	Lot		
0002	"AS-IS" Review and Documentation as described in C.4.4	One (1)	Lot		
0003	"TO-BE" Analysis and Documentation as described in C.4.5	One (1)	Lot		
0004	IMPLEMENTATION PLAN as described in C.4.7	One (1)	Lot		
0005	Project Management as described in C.4.9 - C.4.13	12	Months		
	OPTIONAL SERVICES	Estimated			
0006	Change Management as described in C.4.8 (Option)	1000	Labor Hour		

TOTAL FIRM-FIXED PRICE \$ _____

STATEMENT OF WORK

C.1 SCOPE:

The Office of the Attorney General for the District of Columbia (OAG), seeks an experienced contractor to perform a complete program assessment, a resulting set of business process redesign recommendations, and an implementation strategy for those recommendations for all programs and services provided by its Child Support Services Division (CSSD). The goals of this project are to:

- Improve on federal performance measures
- Increase collections
- Improve customer service
- Fully adopt new technology

C.2 APPLICABLE DOCUMENTS

Item No.	Title	Date
1	42 U.S.C. § 651 <i>et seq.</i> <u>Title 42: The Public Health and Welfare</u> <u>Chapter 7: Social Security</u> <u>Subchapter IV. Grants to States for Aid and Services to Needy Families with Children and for Child-Welfare Services</u> <u>Part D. Child Support and Establishment of Paternity</u>	Most Recent
2	45 CFR §§ 301.0 - 308.3 <u>Title 45. Public Welfare</u> <u>Subtitle B. Regulations Relating to Public Welfare</u> <u>Chapter III. Office of Child Support Enforcement (Child Support Enforcement Program), Administration for Children and Families,</u> <u>Department of Health and Human Services</u>	Most Recent
3	D.C. Code § 46-201 <i>et seq.</i> <u>Title 46. Domestic Relations</u> <u>Chapter 2. Child Support and Medical Support Enforcement.</u> <u>Subchapter I. Child Support Enforcement</u>	Most Recent
4	D.C. Code § 16-901 <i>et seq.</i> <u>Title 16. Particular Actions, Proceedings and Matters</u> <u>Chapter 9. Divorce, Annulment, Separation, Support, Etc.</u>	Most Recent
5	IRS Publication 1075 <u>Tax Information Security Guidelines for Federal, State and Local Agencies</u>	Most Recent

Item No.	Title	Date
6	26 U.S.C. § 6103 <u>Confidentiality and disclosure of returns and return information</u>	Most Recent
7	26 U.S.C. § 7213 <u>Unauthorized disclosure of information</u>	Most Recent
8	26 U.S.C. § 7213A <u>Unauthorized inspection of returns or return information</u>	Most Recent
9	26 U.S.C. § 7431 <u>Civil damages for unauthorized inspection or disclosure of returns and return information</u>	Most Recent
10	5 U.S.C. 552a <u>Records maintained on individuals</u>	Most Recent

C.2 BACKGROUND

C.2.1 CSSD provides all child support services programs for residents of the District of Columbia (including case management, establishment of paternity, support order enforcement, locate, fiscal management, reporting, and data protection as defined by the Federal Office of Child Support Enforcement in accordance with Title IV-D of the Family Support Act of 1974).

C.2.2 In 2017, CSSD managed approximately 44,000 child support cases. CSSD collected and distributed \$56.1 million, 70.8% of which resulted from wage attachments, 7.8% from tax refund offsets, and 21.4% from other sources.

C.2.3 OAG has begun the process of child support system modernization. Phase 1 of the modernization project is system architecture and program planning, scheduled to conclude in February 2019. Phase 2, scheduled to start in April 2019, will be development using a hybrid agile project management methodology, and a test-driven, continuous integration framework. While the modernization project will be concurrent to business process redesign (“BPR”), OAG will use BPR work products to guide the modernization effort.

C.2.4 This project is intended to streamline, simplify, and enhance existing manual and automated processes in order to ensure that CSSD better serves its customers. The work should draw on the contractor’s experience and on best practices in other jurisdictions, but should also rely heavily on in-house knowledge of the operations of and possibilities

for CSSD, including significant engagement with managers and staff throughout the process.

C.3 DEFINITIONS

These terms when used in this solicitation have the following meanings:

C.3.1 DCCSES: The District's federally mandated automated child support enforcement system where child support records, data and information are housed and maintained.

C.3.2 IV-D Program: The program in each state which is responsible for performing child support related functions and duties in conformance with Title IV Part D of the Social Security Act, including but not limited to, locating non-custodial parents, establishing paternity, establishing and enforcing child support obligations, and collecting and distributing current and arrears payments. In the District, this program is operated by CSSD.

C.4 REQUIREMENTS

C.4.1 PROJECT MANAGEMENT

C.4.1.1 The Contractor shall be responsible for providing project management for all services required for the successful completion of the deliverables identified in this statement of work. Project management services include coordination, development and scheduling, administration and supervision, quality assurance/control, subcontractor management, and coordination and oversight of the project to comply with the provisions in the statement of work.

C.4.1.2 Contractor shall maintain a current version of the project plan, the project schedule, and the work breakdown structure throughout the duration of the project; such material is to be presented during the agreed-upon scheduled project meetings. The CSSD Project Manager shall provide input from CSSD regarding the project plan, the project schedule, and the work breakdown at the scheduled meetings and shall approve all changes to those documents on behalf of CSSD.

C.4.1.3 CSSD shall assign a Project Manager to work with the Contractor's Project Manager to coordinate information flow, review deliverables, and coordinate the fulfillment of CSSD obligations related to the project. CSSD also shall assign the necessary personnel and provide required resources and documents to advance project efforts. CSSD shall review and respond to project management reports and updates by mutually agreed upon times as set forth in Section E and the approved project plan.

C.4.2 PROJECT PLAN

- C.4.2.1 The Contractor shall submit a detailed draft Project Plan with its response to the Request for Proposal. At a minimum, this Project Plan shall:
- A. Describe the Contractor's staffing of the project, including roles and responsibilities and the number of FTE (equivalents) associated with each role;
 - B. Describe the desired collaboration with CSSD staff and the specific types of people from the CSSD staff whose support is needed;
 - C. Describe how and when major tasks are to be accomplished, including a
 - a. milestones schedule for completing each task; and
 - D. Define the key processes the Contractor will use to complete this project, including but not limited to:
 - (1) Key roles and stakeholders for decision making;
 - (2) Communications plan with CSSD;
 - (3) Risk and issue management strategy; and
 - (4) Procedures for acceptance of deliverables.

C.4.3 PROJECT KICK-OFF SESSION

- C.4.3.1 The Contractor shall contact CSSD's Project Manager to schedule a Project Kick-Off Session; such session is to occur within ten (10) calendar days of the contract effective date. At the Project Kick-Off Session, key members of the Contractor's project team will meet with designated District representatives to present a high-level project summary, including the proposed Project Plan. The Contractor shall be responsible for providing all materials necessary to support the issues discussed at the meeting.
- C.4.3.2 The Contractor shall capture meeting minutes that incorporate the issues discussed, decisions made, agreements reached, and all action items assigned at the meeting. The Contractor shall prepare a written copy of the Kick-Off Session summary to CSSD, and all accompanying materials and/or documents, by email within ten (10) business days following the meeting.
- C.4.3.3 If any modifications to the Project Plan are required based on this meeting, then an updated plan shall be submitted to CSSD for its review and approval within ten (10) calendar days following this meeting. The Project Plan will be continuously updated throughout the life of the project. All significant changes to time, deliverables, approach, or personnel are to be submitted to CSSD for review and approval before incorporation into the Project Plan.

C.4.4 “AS-IS” DOCUMENTATION OF ALL PROCESSES

C.4.4.1 The Contractor shall perform a comprehensive review and analysis of the way CSSD currently does business. This will include a review of all CSSD’s current work processes, both manual and automated. It will also include a review of all written CSSD policies and procedures to determine if existing policies and procedures are effective, more complex than necessary, and in compliance with existing applicable Federal and State laws and regulations.

The policies and procedures that the Contractor shall review will include, but not be limited to, all aspects of Intake, Locate, Paternity Establishment, Enforcement, Current and Arrears Collections, Customer Services, DCCSES, Mailroom, Policy/Training/Administrative Affairs, and Confidentiality and Security.

C.4.4.2 The Contractor and CSSD shall identify staff and contractors to interview – including line staff as well as the managers of each unit – to determine how each unit within CSSD operates and to understand the role which each unit plays in the overall operation of the District’s IV-D Program. During these interviews, the Contractor shall be required to become familiar with the tools and resources (both automated and non-automated) that staff use to perform their duties, the policies and procedures which they follow in executing their tasks, length of time it generally takes for tasks to be completed, issues which may arise when performing their responsibilities, and any other information which the Contractor deems necessary for it to have a complete understanding of the tasks performed by workers in each unit. As part of its documentation of CSSD’s work processes, the Contractor shall learn the dynamics of each unit, including, but not limited to, the number of workers and the responsibilities of each worker in that unit, the grade and step of each worker, and training required for each worker to properly perform his or her job.

C.4.4.3 The deliverable for this requirement should include, at a minimum:

- a. A mapping document showing and narratively describing each current business process; and
- b. A descriptive report, including high level identification and assessment of processes or policies that create unnecessary complexity or inefficiency.

C.4.4.4 The deliverable for this requirement shall be delivered in accordance with the timeline described in the Project Plan. Acceptance of the final As-Is deliverables will be contingent upon review and acceptance by the CSSD Director. The Contractor shall submit at least one draft of each As-Is deliverable to the CSSD Project Manager, according to the timeline set out in the agreed upon Project Plan. CSSD shall review and provide comments to the Contractor for inclusion in a final As-Is deliverable to ensure that it presents an accurate picture of the CSSD environment and that each deliverable meets the statement of work and the representations and warranties expressed in the contract. Draft edits will continue until the CSSD Project Manager and Contractor Project Manager agree that the deliverable is accurate and is sufficient to present to the

CSSD Director for review. Agreement by the CSSD Project Manager to present a deliverable to the CSSD Director shall not constitute acceptance of the deliverable. The CSSD Director will review the final As-Is deliverable and either accept or reject it within ten (10) business days from receipt, as set out in Section E.

C.4.5 “TO-BE” DOCUMENTATION OF ALL PROCESSES

C.4.5.1 The Contractor shall analyze CSSD’s current processes for inefficiencies, redundancies, and opportunities for better integration with a modernized DCCSES and propose options for a new set of business processes. In order to complete this analysis, the Contractor shall compare CSSD’s policies and procedures to those of a minimum of three (3) other IV-D Programs with similar key characteristics. In doing this comparison, the Contractor shall compare CSSD’s interpretation of Federal laws and regulations, as evidenced in its written policies and procedures, with those of the other IV-D Programs. The Contractor shall consider various options for program design and emphasis in line with its ultimate program goals, including but not limited to moving to a hybrid judicial system, cradle to grave processing, and increasing its non-IV-D caseload.

C.4.5.2 The deliverable for this requirement should include, at a minimum:

- a. A mapping document showing and narratively describing proposed business process;
- b. A gap analysis mapping the change between the “as is” and “to be” states to show their relationship and ensure that no crucial processes have been lost;
- c. A description of manual processes which could be automated;
- d. A narrative report that includes analysis of:
 - (1) Other IV-D programs and best practices considered;
 - (2) Considerations for adoption of alternate business design proposals;
 - (3) Requirements and touch points to be included with the system modernization project;
 - (4) Necessary changes to State statutes and regulations needed to enhance and/or simplify CSSD’s policies and procedures and work processes, while still remaining compliant with governing Federal authorities;
 - (5) Necessary changes to existing internal policies and procedures
 - (6) Explanation of how instituting the recommended changes will positively impact the District’s program, including cost benefit and return on investment analyses for each recommended business process or system change and the overall expected impact on the program’s cost effectiveness. For business processes or system changes that the Contractor is unable to readily measure due to unavailability of data, timing issues, or for some other reason, the Contractor shall make note of this in the report and include supporting rationale;
 - (7) Explanation of how failure to implement recommendations outlined in the report could negatively impact the program’s operations; and

- (8) Recommendations for metrics to monitor on a going forward basis the efficacy of proposed changes.

C.4.5.3 The deliverable for this requirement shall be delivered in accordance with the timeline described in the Project Plan. Acceptance of the final To-Be deliverables will be contingent upon review and acceptance by the CSSD Director. The Contractor shall submit at least one draft of each To-Be deliverable to the CSSD Project Manager, according to the timeline set out in the agreed upon Project Plan. CSSD shall review and provide comments to the Contractor for inclusion in a final To-Be deliverable to ensure that it presents an accurate picture of the possible CSSD environment and that each deliverable meets the statement of work and the representations and warranties expressed in the contract. Draft edits will continue until the CSSD Project Manager and Contractor Project Manager agree that the deliverable is accurate and is sufficient to present to the CSSD Director for review. Agreement by the CSSD Project Manager to present a deliverable to the CSSD Director shall not constitute acceptance of the deliverable. The CSSD Director will review the final To-Be deliverable and either accept or reject it within ten (10) business days from receipt, as set out in Section E.

C.4.6 “TO-BE” DOCUMENTATION OF STAFFING NEEDS AND ORGANIZATION

C.4.6.1 In accordance with the “to be” documentation of processes, the Contractor shall propose a “to be” description of the CSSD organizational structure and the associated staffing needs. This deliverable will include, at a minimum:

- a. Organizational chart with units and descriptions of unit functions;
- b. Number of staff, as well as grade and step recommendations for each unit;
- c. Basic job descriptions for each unit/position;
- d. Skill sets and training required for each unit/position; and
- e. A description of the anticipated benefits, including a cost analysis, for these changes, as well as the costs of failure to institute recommendations.

C.4.6.2 The deliverable for this requirement shall be delivered in accordance with the timeline described in the Project Plan. Acceptance of the final To-Be deliverables will be contingent upon review and acceptance by the CSSD Director. The Contractor shall submit at least one draft of each To-Be deliverable to the CSSD Project Manager, according to the timeline set out in the agreed upon Project Plan. CSSD shall review and provide comments to the Contractor for inclusion in a final To-Be deliverable to ensure that it presents an accurate picture of the CSSD environment and that each deliverable meets the statement of work and the representations and warranties expressed in the contract. Draft edits will continue until the CSSD Project Manager and Contractor Project Manager agree that the deliverable is accurate and is sufficient to present to the CSSD Director for review. Agreement by the CSSD Project Manager to present a deliverable to the CSSD Director shall not constitute acceptance of the deliverable. The CSSD Director will review the final To-Be deliverable and either accept or reject it within ten (10) business days from receipt, as set out in Section E.

C.4.7 IMPLEMENTATION PLAN

C.4.7.1 The Contractor shall submit an Implementation Plan that provides step-by-step instructions on implementing the recommended changes described in Sections C.4.4 through C.4.6 above. This plan will incorporate best practices from change management strategy. This plan shall include, at a minimum:

- a. Necessary staffing, both internal to CSSD and from the Contractor to drive organizational change, as well as the roles each person involved will play;
- b. Contractor staffing shall include at a minimum a full time on site Project Manager, who shall be responsible for ensuring all recommendations and changes which CSSD has agreed to follow and make are properly applied. She or he shall work closely with CSSD's designated representatives on all programmatic and technical changes, including but not limited to, editing existing written policies and procedures, drafting missing policies and procedures, preparing "how to" manuals, drafting proposed legislative and regulatory changes, and aiding CSSD's DCCSES maintenance contractor to make necessary changes to the automated system. The Project Manager shall also be responsible for developing and conducting required training and working with CSSD's Training Coordinator and other identified CSSD staff to ensure they are able to continue necessary training after the Project Manager leaves. In addition, the Project Manager shall attend meetings and participate in conference calls, at CSSD's request, and be prepared to discuss work being done under the contract. CSSD will allow other Contractor personnel to provide support to the Project Manager during the Implementation Phase; provided, that these individuals are identified in the Implementation Plan, and have undergone the required background check and taken the required training stipulated in Section C.4.9 below;
- c. Development and delivery of necessary training for managers and staff to adapt to new roles, responsibilities, and processes;
- d. Internal communications plan to ensure transparency and buy in from all levels of the organization;
- e. Metrics for continuous improvement throughout the implementation and organizational change process;
- f. Metrics for performance once changes are implemented;
- g. Timeline for change, including a milestone schedule for completing each task;
- h. Risk assessment for proposed changes and change strategies; and
- i. A cost projection, illustrating the potential cost to CSSD associated with the transition from the As-Is to the To-Be states. The cost projection model will consider and offer an estimate for all types of costs associated with implementing the To-Be process. The cost model is to include, but not be limited to:
 - (1) Staff/personnel
 - (2) Technology
 - (3) Materials and related tools
 - (4) Training
 - (5) Other costs

C.4.7.2 The deliverable for this requirement shall be delivered in accordance with the timeline described in the Project Plan. Acceptance of the final Implementation Plan will be contingent upon review and acceptance by the CSSD Director. The Contractor shall submit at least one draft of the deliverable to the CSSD Project Manager, according to the timeline set out in the agreed upon Project Plan. CSSD shall review and provide comments to the Contractor for inclusion in the final plan deliverable to ensure that it presents a realistic picture of the how to transition the CSSD environment and that the deliverable meets the statement of work and the representations and warranties expressed in the contract. Draft edits will continue until the CSSD Project Manager and Contractor Project Manager agree that the deliverable is accurate and is sufficient to present to the CSSD Director for review. Agreement by the CSSD Project Manager to present a deliverable to the CSSD Director shall not constitute acceptance of the deliverable. The CSSD Director will review the final Implementation Plan deliverable and either accept or reject it within ten (10) business days from receipt, as set out in Section E.

C.4.8 CHANGE MANAGEMENT

C.4.8.1 This Contract includes an option to retain the Contractor through CSSD's organizational and technological transition as it executes the Implementation Plan described in Section C.4.7 above. If CSSD elects to retain the Contractor through this transition, then the Contractor shall provide direct support and coaching to executive leadership and front-line managers and supervisors as they help their direct reports through transitions. Responsibilities would include:

- a. Apply a structured change management approach and methodology for the people-side of change caused by the project and change efforts;
- b. Develop a change management strategy based on a situational awareness of the details of the change and the groups being impacted by the change;
- c. Identify potential people-side risks and anticipated points of resistance and develop specific plans to mitigate or address the concerns;
- d. Conduct readiness assessments, evaluate results and present findings in a logical and easy-to-understand manner;
- e. Develop a set of actionable and targeted change management plans including communication plan, sponsor roadmap, coaching plan, training plan and resistance management plan;
- f. Support the execution of plans by employee-facing managers and business leaders, including providing necessary training where appropriate;
- g. Be an active and visible coach to executive leaders who are change sponsors;
- h. Create and manage measurement systems to track adoption, utilization and proficiency of individual changes;
- i. Identify resistance and performance gaps and work to develop and implement corrective actions;
- j. Create and enable reinforcement mechanisms and celebrations of success; and
- k. Work with project teams to integrate change management activities into the overall project plan.

C.4.8.2 This requirement shall also include a final report at the end of the Contract summarizing all work done under this requirement. This report shall describe in detail when and how tasks were completed, measurable benefits that the program received from implementing the Contractor's recommended changes, and future and follow-up activities required for CSSD to continue to benefit from changes instituted. Acceptance criteria for this project phase will be outlined at the time CSSD determines that it will exercise the option related to change management support.

C.4.9 GENERAL REPORTING REQUIREMENTS

C.4.9.1 Project Update Meetings. The Contractor shall engage in regular and frequent communication with the CSSD Project Manager. At the Kick-Off Session, the Contractor will propose a meeting schedule and format to provide ongoing project status updates to CSSD. Contractor will capture the discussion and action items at each such meeting and provide a summary of each meeting to CSSD for review and approval within seven (7) calendar days of each meeting. The CSSD Project Manager will approve or identify changes to the summary within three (3) business days after receipt of each draft. The Contractor will make changes and resubmit the document for approval within three (3) calendar days of receiving the returned draft from CSSD. Among the topics to be included in the meetings are:

- (1) Work breakdown structure
- (2) Project milestone and deliverable progress
- (3) Needed CSSD staff assistance or document/system access support
- (4) Deliverable acceptance/quality assurance matters
- (5) Decisions needed and their resolution
- (6) Risk identification and risk avoidance or mitigation strategy and tactics
- (7) Issue identification, escalation needs, and resolution
- (8) Project communications support deliverables
- (9) Change management recommendations and/or action items

C.4.9.2 **Monthly Reports:** By the 10th of each month, the Contractor shall provide a detailed written report to CSSD documenting the work performed the prior month. The Contractor shall readily address any questions that CSSD has following review of these reports, and shall meet with designated CSSD representatives to discuss these reports at CSSD's request.

C.4.10 PROJECT CLOSURE

C.4.10.1 Project Completion Report. Upon completion of project activities identified in the statement of work, the Contractor shall develop and submit a written project completion report to CSSD for review and approval. The Contractor's report must describe and demonstrate how the work, defined in the statement of work, was delivered and how it fulfills CSSD acceptance requirements. The report also must include a listing of

frequently asked questions and lessons learned during the BPR activities, implementation planning, and during change execution if the option is exercised. The Contractor shall deliver the draft project completion report to the CSSD Project Manager at least ten (10) days before the planned Close-Out Session.

C.4.10.2 The Contractor shall contact CSSD's Project Manager to schedule a Project Close-Out Session. At the Project Kick-Off Session, key members of the Contractor's project team will meet with designated District representatives to review the project completion report and to determine whether all project deliverables have been completed and accepted by CSSD. The Contractor shall be responsible for providing all materials necessary to support the issues discussed at the meeting.

C.4.10.2 The Contractor shall capture meeting minutes that incorporate the issues discussed, decisions made, agreements reached, and all action items assigned at the meeting. The Contractor shall prepare a written copy of the Close-Out Session summary to CSSD, and all accompanying materials and/or documents, by email within ten (10) business days following the meeting. In the event that additional effort on deliverables is identified, the Contractor shall submit a plan, including a timeline, for completing any unfinished deliverables. Upon acceptance of any such outstanding deliverables, the Contractor will update the project completion report and resubmit it to CSSD for approval and project closure.

C.4.11 KEY PERSONNEL

C.4.11.1 CSSD will select a Contractor, in part, because of special qualifications of Contractor's key personnel. Contractor's key personnel shall not delegate the authority or the substantial performance of responsibilities they are expected to provide in furtherance of contract activities to another of Contractor's employees, subcontractors, or other representatives without the prior written consent of CSSD. CSSD will not unreasonably withhold or delay such consent. Further, Contractor shall not reassign or transfer key personnel to other duties or positions, such that the key personnel are no longer available to provide CSSD with their expertise, experience, judgement, and personal attention, without first obtaining CSSD's written consent to such reassignment or transfer. CSSD will not unreasonably withhold or delay such consent. Notwithstanding the foregoing, Contractor may take steps to replace key personnel without CSSD consent in the event that any such person is no longer available due to death, illness, or termination of employment with Contractor. In the event that a person designated as key personnel is no longer available, as noted above, CSSD shall have the right to interview, review the qualifications of, and approve or disapprove the proposed replacement. Any such replacement shall have substantially equivalent or better qualifications to the key personnel member being replaced. Any such replacement thereafter shall be deemed as key personnel and subject to this provision.

C.4.11.2 The key personnel and their immediate staff shall provide the services set forth in Section C above at 441 4th Street, NW, Washington, DC 20001.

- C.4.11.3 The Contractor shall provide a Project Manager who is experienced in business process reengineering and who has demonstrable experience and understanding of organizational analysis and related requirements. CSSD prefers a Project Manager who has managed a BPR project in a state child support program. In the event that the Contractor's Project Manager does not have child support experience, the Contractor shall provide a member of the key personnel group who has demonstrable experience and understanding of child support programs and functions. Contractor's Project Manager shall serve as a single point of contact for CSSD regarding items that are included in the defined scope of the project. This person shall not be a subcontractor of the Contractor.
- C.4.11.4 All key personnel, in addition to the Project Manager, shall be employed by or committed to join the Contractor's organization by the contract effective date. The District reserves the right to approve or disapprove all initial or replacement key personnel prior to their assignment to the project.
- C.4.11.5 The District shall have the right to require the Contractor to remove any individual (key personnel or otherwise) from assignment to this project for failure to perform their daily functions, by providing fifteen (15) day's prior written notice to the Contractor.
- C.4.11.6 The Contractor shall complete and submit an experience matrix and resume for each individual identified or proposed to substitute as Key Personnel.
- C.4.11.7 The Offeror shall maintain a detailed job description for each key personnel position to be performed as part of this Contract for review and approval by the District.
- C.4.11.8 Key personnel shall be located onsite.

C.4.12 BACKGROUND CHECKS AND CSSD POLICIES

- C.4.12.1** Background Checks. The Contractor shall require all its personnel and subcontractors who shall work on the contract to undergo and pass a background check, as directed by CSSD, prior to being permitted to perform any services under the contract. Background checks will be performed at the Contractor's expense. Contractor will provide completion documentation and a results summary regarding the background check findings for each employee, agent, or subcontractor proposed to perform under the contract. CSSD, in its sole discretion, has the right to reject or limit involvement of any employee, agent, or subcontractor of Contractor, whether or not designated as key personnel, based on the results of the person's background check.
- C.4.12.2** CSSD Policies. The Contractor shall also require its staff to adhere to all CSSD policies and procedures while engaging in business on the District's premises, including the use and disposal of resources and documentation, and shall require its staff to take mandatory CSSD security trainings prior to commencing work on the project.

C.4.13 SAFEGUARDING OF INFORMATION

Given the nature of its work, CSSD handles highly sensitive and confidential information and documentation including, but not limited to, social security numbers and Federal tax information (“FTI”), which is strictly prohibited from disclosure or use except as permitted by law. As the Contractor and its personnel shall have access to such highly sensitive and confidential information during the course of performing the contractual requirements, the Contractor shall ensure that its workers (including subcontractors) are aware of laws and regulations governing the use of such sensitive and confidential information. As the Contractor and its workers (including subcontractors) will be privy to FTI during the course of performing the Contractor’s contractual responsibilities, Internal Revenue Service (“IRS”) Publication 1075 shall be incorporated into this contract and made a part hereof, thereby obligating the Contractor and its workers (including subcontractors) to adhere to its terms and conditions. Specifically, the Contractor and its workers (including subcontractors) shall adhere to the terms and conditions in Exhibit 7 of Publication 1075, as set forth below:

I. PERFORMANCE

In performance of this contract, the Contractor agrees to comply with and assume responsibility for compliance by his or her employees with the following requirements:

- (1) All work will be performed under the supervision of the contractor or the contractor's responsible employees.
- (2) The contractor and the contractor’s employees with access to or who use FTI must meet the background check requirements defined in IRS Publication 1075.
- (3) Any Federal tax returns or return information (hereafter referred to as returns or return information) made available shall be used only for the purpose of carrying out the provisions of this contract. Information contained in such material shall be treated as confidential and shall not be divulged or made known in any manner to any person except as may be necessary in the performance of this contract. Inspection by or disclosure to anyone other than an officer or employee of the contractor is prohibited.
- (4) All returns and return information will be accounted for upon receipt and properly stored before, during, and after processing. In addition, all related output and products will be given the same level of protection as required for the source material.
- (5) No work involving returns and return information furnished under this contract will be subcontracted without prior written approval of the IRS.

(6) The contractor will maintain a list of employees authorized access. Such list will be provided to the agency and, upon request, to the IRS reviewing office.

(7) The agency will have the right to void the contract if the contractor fails to provide the safeguards described above.

II. CRIMINAL/CIVIL SANCTIONS

(1) Each officer or employee of any person to whom returns or return information is or may be disclosed shall be notified in writing by such person that returns or return information disclosed to such officer or employee can be used only for a purpose and to the extent authorized herein, and that further disclosure of any such returns or return information for a purpose or to an extent unauthorized herein constitutes a felony punishable upon conviction by a fine of as much as \$5,000 or imprisonment for as long as five years, or both, together with the costs of prosecution. Such person shall also notify each such officer and employee that any such unauthorized future disclosure of returns or return information may also result in an award of civil damages against the officer or employee in an amount not less than \$1,000 with respect to each instance of unauthorized disclosure. These penalties are prescribed by IRCs 7213 and 7431 and set forth at 26 CFR 301.6103(n)-1.

(2) Each officer or employee of any person to whom returns or return information is or may be disclosed shall be notified in writing by such person that any return or return information made available in any format shall be used only for the purpose of carrying out the provisions of this contract. Information contained in such material shall be treated as confidential and shall not be divulged or made known in any manner to any person except as may be necessary in the performance of this contract. Inspection by or disclosure to anyone without an official need-to-know constitutes a criminal misdemeanor punishable upon conviction by a fine of as much as \$1,000.00 or imprisonment for as long as 1 year, or both, together with the costs of prosecution. Such person shall also notify each such officer and employee that any such unauthorized inspection or disclosure of returns or return information may also result in an award of civil damages against the officer or employee [United States for Federal employees] in an amount equal to the sum of the greater of \$1,000.00 for each act of unauthorized inspection or disclosure with respect to which such defendant is found liable or the sum of the actual damages sustained by the plaintiff as a result of such unauthorized inspection or disclosure plus in the case of a willful inspection or disclosure which is the result of gross negligence, punitive damages, plus the costs of the action. The penalties are prescribed by IRCs 7213A and 7431 and set forth at 26 CFR 301.6103(n)-1.

(3) Additionally, it is incumbent upon the contractor to inform its officers and employees of the penalties for improper disclosure imposed by the Privacy Act of 1974, 5 U.S.C. 552a. Specifically, 5 U.S.C. 552a(i)(1), which is made applicable

to contractors by 5 U.S.C. 552a(m)(1), provides that any officer or employee of a contractor, who by virtue of his/her employment or official position, has possession of or access to agency records which contain individually identifiable information, the disclosure of which is prohibited by the Privacy Act or regulations established thereunder, and who knowing that disclosure of the specific material is so prohibited, willfully discloses the material in any manner to any person or agency not entitled to receive it, shall be guilty of a misdemeanor and fined not more than \$5,000.

(4) Granting a contractor access to FTI must be preceded by certifying that each individual understands the agency's security policy and procedures for safeguarding IRS information. Contractors must maintain their authorization to access FTI through annual recertification. The initial certification and recertification must be documented and placed in the agency's files for review. As part of the certification and at least annually afterwards, contractors must be advised of the provisions of IRCs 7431, 7213, and 7213A (see [Exhibit 4, Sanctions for Unauthorized Disclosure](#), and [Exhibit 5, Civil Damages for Unauthorized Disclosure](#)). The training provided before the initial certification and annually thereafter must also cover the incident response policy and procedure for reporting unauthorized disclosures and data breaches. (See Section 10) For both the initial certification and the annual certification, the contractor must sign, either with ink or electronic signature, a confidentiality statement certifying their understanding of the security requirements.

III. INSPECTION

The IRS and the Agency, with 24 hour notice, shall have the right to send its inspectors into the offices and plants of the contractor to inspect facilities and operations performing any work with FTI under this contract for compliance with requirements defined in IRS Publication 1075. The IRS' right of inspection shall include the use of manual and/or automated scanning tools to perform compliance and vulnerability assessments of information technology (IT) assets that access, store, process or transmit FTI. On the basis of such inspection, corrective actions may be required in cases where the contractor is found to be noncompliant with contract safeguards.

SECTION D: PACKAGING AND MARKING

Not Applicable

SECTION E: INSPECTION AND ACCEPTANCE

E.1 DELIVERY REQUIREMENTS

E.1.1 Interim Deliverable or Milestone Completion. For each deliverable and completed milestone described in Section C above, the Contractor shall meet with the CSSD Project Manager and other personnel s/he identifies to present the deliverable or milestone.

E.1.1.1 Consultant shall provide written notice to CSSD upon delivery of each deliverable or completed milestone. No later than (i) ten (10) business days after receipt of the notice, or (ii) the date set forth in the Project Schedule for CSSD review, CSSD shall determine whether the deliverable or milestone meets the associated Acceptance Criteria.

E.1.1.2 All tangible deliverables are to be submitted in MS Word, Excel, or Project (2010 format), include all of the components for that deliverable identified in the scope of work in Section C and any adjustments outlined in the accepted Project Plan, and be consistent in form and content with the Sixth Edition of the PMI Project Management Body of Knowledge (PMBOK) as well as the representations and warranties of the contract. The CSSD Project Manager will be responsible for reviewing all such deliverables and securing the requisite approval according to the acceptance criteria for each deliverable as set out in Section C and as determined in writing after execution of the contract.

E.1.1.3 If CSSD determines that the deliverable or completed milestone, in all material respects, meets the associated Acceptance Criteria, CSSD shall notify Consultant of its acceptance. CSSD's acceptance of any deliverable or milestone will not be construed as a waiver of its rights for any defect that was not discovered, or that reasonably could have been discovered, by CSSD in review of such deliverable or milestone.

E.1.1.4 If CSSD determines that a deliverable or milestone, in all material respects, does not meet the Acceptance Criteria, it shall notify the Consultant in writing of CSSD's rejection of the deliverable or purported milestone completion as well as the basis for rejection. Upon receipt of notice of non-acceptance, within ten (10) business days, Consultant shall modify, improve, or complete the deliverable or milestone, at Consultant's sole expense, so that the deliverable or milestone meets the Acceptance Criteria in all material respects. Consultant shall notify CSSD in writing that it has undertaken the requested modifications, improvements, or completion tasks, and it shall resubmit the deliverable or milestone completion documentation to CSSD. CSSD shall review the deliverable or milestone resubmission within ten (10) business days after receiving Consultant's delivery. Failure of the resubmission to meet the Acceptance Criteria in all material respects, after the second acceptance attempt, shall constitute a default by Consultant. In the event of such default, CSSD may (i) notify Consultant of the default and instruct Consultant to modify or improve the submission further, or (ii) notify Consultant of the default and instruct Consultant to cease work on the deliverable or milestone. In the case of (ii), Consultant shall refund to CSSD all amounts paid by CSSD related to such

deliverable or milestone. Such refund shall be in addition to, and not in lieu of, any other remedies CSSD may have for the Consultant's default.

E.1.2 Final Acceptance. Final Acceptance means that CSSD has accepted all contract deliverables and all completed milestone activity, including properly negotiated and accepted change orders.

E.1.3 Except as provided otherwise herein, the inspection and acceptance requirements for this contract shall be governed by clause number six (6), Inspection of Services, of the Government of the District of Columbia's Standard Contract Provisions for use with Supplies and Services Contracts, dated July 2010. (Attachment J.1)

SECTION F: DELIVERIES OR PERFORMANCE

F.1 TERM OF TASK ORDER

The term of the task order agreement shall be for a period of one (1) year from the effective date specified on the cover page of the agreement.

F.2 OPTION TO EXTEND THE TERM OF THE TASK ORDER

F.2.1 The District may extend the term of this task order agreement for a period of two (2) one-year option periods, or successive fractions thereof, or successive fractions thereof, by written notice to the Contractor before the expiration of the task order; provided that the District will give the Contractor preliminary written notice of its intent to extend at least thirty (30) days before the task order expires. The preliminary notice does not commit the District to an extension. The exercise of this option is subject to the availability of funds at the time of the exercise of this option. The Contractor may waive the thirty (30) day preliminary notice requirement by providing a written waiver to the Contracting Officer prior to expiration of the task order agreement.

F.2.2 If the District exercises this option, the extended task order shall be considered to include this option provision.

F.2.3 The price for the option period shall be as specified in Sec. B of the task order.

F.2.4 The total duration of this task order agreement, including the exercise of any options under this clause, shall not exceed three (3) years.

F.3 DELIVERABLES

F.3.1 The Contractor shall perform the activities required to successfully complete the District's requirements and submit each deliverable, including but not limited to deliverables listed in the following table, to the Contract Administrator (CA) or Project Manager (PM) identified in Section D, as specified below::

No.	Deliverable	Quantity/ Format/Method of Delivery	Due Date	To Whom
1	Project Plan/Updates	Submitted with proposal	Proposal deadline date	CO
2a	Project Kick-Off Session	Meeting attendance	Within 10 days of contract effective date	CA/PM
2b	Project Kick-Off Session Minutes	Drafts submitted in Word format	Within 10 business days of the meeting.	PM – draft(s) CA – final
3	Project Plan Modifications	Drafts submitted in Word format	Due date proposed and finalized at Project Kick-Off Session	PM – draft(s) CA – final
4a	As-Is Mapping Document and Business Process Narrative	Drafts submitted in Word format	Due date proposed and finalized at Project Kick-Off Session	PM – draft(s) CA – final
4b	As-Is Descriptive Report	Drafts submitted in Word format	Due date proposed and finalized at Project Kick-Off Session	PM – draft(s) CA – final
5a	To-Be Mapping Document	Drafts submitted in Word format	Due date proposed and finalized at Project Kick-Off Session	PM – draft(s) CA – final
5b	To-Be Recommendations Report and Gap Analysis (Structure, Process, Policy, and Staffing)	Drafts submitted in Word format	Due date proposed and finalized at Project Kick-Off Session	PM – draft(s) CA – final
5c	To-Be Implementation Plan and Cost Projection	Drafts submitted in Word format	Due date proposed and finalized at Project Kick-Off Session	PM – draft(s) CA – final
6a	Change Management Support (Optional)	To be determined	Due dates to be determined upon decision to exercise the option	To be determined

No.	Deliverable	Quantity/ Format/Method of Delivery	Due Date	To Whom
6b	Change Management Report	Drafts submitted in Word format	Due dates to be determined upon decision to exercise the option	PM – draft(s) CA – final
7a	Project Update Meetings	Meeting attendance	Due dates finalized at Project Kick-Off Session	PM
7b	Project Kick-Off Session Minutes	Drafts submitted in Word format	Within 7 days of the meeting. Changes within 3 days of receiving returned draft.	PM – draft(s) CA – final
7c	Monthly Project Reports	Drafts submitted in Word format	By the 10 th of each month	PM
7d	Additional Reports	Drafts submitted in Word format	Due dates to be negotiated at time of assignment	PM – draft(s) CA – final
8a	Project Completion Report	Drafts submitted in Word format	At least 10 days before Project Close-Out Session	PM
8b	Project Close-Out Session	Meeting attendance	Within 10 days of contract effective date	CA/PM
8c	Project Close-Out Session Minutes	Drafts submitted in Word format	Within 10 business days of the meeting.	PM – draft(s) CA – final
8d	Supplemental Project Close-Out Activities	To be determined, if additional effort is required to complete deliverables	Due dates to be determined, as needed	PM – draft(s) CA – final

F.3.2 The Contractor shall submit to the Contracting Officer, as a deliverable, the report described in section H.5.5 of this contract that is required by the 51% District Residents New Hires Requirements and First Source Employment Agreement. If the Contractor does not submit the report as part of the deliverables, final payment to the Contractor may not be paid.

D. CONTRACT ADMINISTRATION DATA

D.1 Contracting Officer (CO)

D.1.1 Contracts may be entered into and signed on behalf of the District only by contracting officers. The name, address and telephone number of the Contracting Officer is:

Janice Parker Watson
Contracting Officer
Office of the Attorney General
Support Services Division/Procurement Unit
441 4th Street NW, Suite 1100 South
Washington, DC 20001

Email : oag.businessopportunities@dc.gov
Phone : 202-442-9882 Fax : 202-730-0484

D.1.2 The Contracting Officer is the only person authorized to approve changes in any of the requirements of this contract.

D.1.3 The Contractor shall not comply with any order, directive or request that changes or modifies the requirements of this contract, unless issued in writing and signed by the Contracting Officer.

D.1.4 In the event the Contractor effects any change at the instruction or request of any person other than the Contracting Officer, the change will be considered to have been made without authority and no adjustment will be made in the contract price to cover any cost increase incurred as a result thereof.

D.2 CONTRACT ADMINISTRATOR (CA)

D.2.1 The CA is responsible for general administration of the contract and advising the CO as the Contractor's compliance or noncompliance with the contract. The CA has the responsibility of ensuring the work conforms to the requirements of the contract and such other responsibilities and authorities as may be specified in the contract. These include:

D.2.1.1 Keeping the CO fully informed of any technical or contractual difficulties encountered during the performance period and advising the CO of any potential problem areas under the contract;

D.2.1.2 Coordinating site entry for staffing personnel, if applicable;

D.2.1.3 Reviewing invoices for completed work and recommending approval by the CO if the Bidder's prices and costs are consistent with the contractual amounts and progress is satisfactory and commensurate with the rate of expenditure;

D.2.1.4 Reviewing and approving invoices for deliverables to ensure receipt of goods and services. This includes the timely processing of invoices and vouchers in accordance with the District's payment provisions; and

D.2.1.5 Maintaining a file that includes all contract correspondence, modifications, records of inspections (site, data, equipment) and invoice or vouchers.

D.2.2 The address and telephone number of the CA:

Sophia Hollis Ticer
Assistant Deputy Attorney General
Office of the Attorney General for the District of Columbia
Child Support Services Division
441 4th Street NW, Suite 550 North
Washington, DC 20001
202.727-3400
Sophia.Ticer@dc.gov

D.2.3 The CA shall NOT have the authority to:

- (1) Award, agree to, or sign any contract, delivery order or task order. Only the CO shall make contractual agreements, commitments or modifications;
- (2) Grant deviations from or waive any of the terms and conditions of the contract;
- (3) Increase the dollar limit of the contract or authorize work beyond the dollar limit of the contract,
- (4) Authorize the expenditure of funds by the Contractor;
- (5) Change the period of performance; or
- (6) Authorize the use of District property, except as specified under the contract.

D.2.4 The Contractor will be fully responsible for any changes not authorized in advance, in writing, by the Contracting Officer.

D.3 Project Manager – the CA may assign tasks specified in Section C to the following Project Manager:

June Melvin Mickens | Project Manager,
CSSD Business Process Reengineering
Office of the Attorney General |
Government of the District of Columbia
441 4th Street NW |
Washington, DC 20001 |
O: (202) 724.1464 | june.mickens@dc.gov

D.4 INVOICE SUBMITTAL

- a) The Contractor shall create and submit payment requests in an electronic format through the DC Vendor Portal, <https://vendorportal.dc.gov>.
- b) The Contractor shall submit proper invoices on a monthly basis or as otherwise specified in the executed task order.
- c) To constitute a proper invoice, the Contractor shall enter all required information into the Portal after selecting the applicable purchase order number which is listed on the Contractor's profile.

D.5 DISTRICT RESPONSIBILITIES

D.5.1 The District will provide workspace at CSSD's offices located at 441 4th Street NW, Washington, DC 20001, for the Contractor's staff who need to be onsite in order to properly carry out the Contractor's contractual responsibilities.

D.5.2 The District will provide the Contractor's staff access to all required documentation, files, and automated systems for the purpose of performing the requirements set forth in Sec. C.4 above, provided that the individuals have passed the required background check and taken all required trainings. The District will be permitted to immediately discontinue access to its property and resources to any of Contractor's workers who do not follow CSSD's policies and procedures, or who violate District or Federal laws and regulations.

E. PROPOSAL INSTRUCTIONS

- E.1** The task order proposal shall consist of two separate parts: Technical and Price and marked: “**Task Order Proposal in response to Solicitation No. DCCB-2019-T-0012, Child Support Business Process Re-Engineering**”.
- E.2** All proposals must be formatted on 8.5” by 11” paper, typewritten and submitted electronically by email in PDF format to oag.businessopportunities@dc.gov no later than the date specified in block 8 on page 1 of this solicitation. NOTE: Each attachment is limited to a maximum size of 25 MB.

E.3 TECHNICAL PROPOSAL

The technical proposal shall at a minimum, contain sufficient detail to provide a clear and concise demonstration fully reflecting the manner in which the Offeror proposes to address the requirements of the Statement of Work given the evaluation factors in Section F. The offeror shall respond to each factor in a way that will allow the District to evaluate the offeror’s response. The offeror shall submit information in a clear, concise, factual and logical manner providing a comprehensive description of program services and delivery thereof. The information requested for the technical proposal shall facilitate evaluation for all proposals.

F.1.1 TECHNICAL APPROACH

- F.1.1.1** The Offeror must provide a detailed Project Plan describing how it proposes to fulfill each of the requirements set forth in Section C.4.
- F.1.1.2** The Offeror must provide a detailed Implementation Plan describing how it proposes to fulfill each of the requirements set forth in Section C.4.7.

F.1.2 EXPERIENCE AND QUALIFICATIONS OF PERSONNEL

- F.1.2.1** The Offeror shall submit an experience matrix and resume for each individual identified as key personnel.
- F.1.2.2** The Offeror shall provide detailed job descriptions for key positions.

F.1.3 PAST PERFORMANCE

- F.1.2.1** The Offeror must demonstrate experience in evaluating the entire operations of other IV-D Programs, including their policies and procedures, work processes, and automated systems, in addition to proposing changes to State laws and regulations which impact these programs’ operations. This experience must also include making recommendations, based on the Offeror’s assessment, on how these programs could streamline processes,

improve cost effectiveness, and function more effectively to enhance their overall performance and level of service.

F.1.2.2 The Offeror must demonstrate experience in implementing changes to IV-D Programs which have proven to streamline program operations and improve the efficiency and overall productivity of these programs.

F.1.2.3 The Offeror shall provide at least three (3) references the offeror has contracted with within the last five (5) years who can provide information regarding the quality of the offeror's past performance at performing work similar to the work described in the subject proposal. The offeror must provide contact information including the names, telephone and email addresses of reference sources who can provide information on the quality of the offeror's past performance. OAG will directly contact the references sources to obtain information on the offeror's past performance.

(OAG recommends that the Offeror alert the contact references to let them know their names have been submitted as reference sources and to authorize them to provide past performance information to OAG when OAG requests it.)

E.4 PRICE PROPOSAL

E.4.1 This section shall be submitted on the Price Schedule on page 2 of this solicitation. Pricing shall be at firm fixed rates that shall include all direct and indirect costs for providing the required services. Unless otherwise directed in writing, the price proposal shall also include a copy or a link to the Offeror's GSA Price Schedule and its CBE certification number, if applicable.

E.4.2 Offerors' proposed prices may be lower than its GSA Federal Supply Schedule if the Offeror provides evidence that it has met the Services Contract Act requirements and Way to Work Act of 2006. The Contractor shall use the prices for a comparable labor category as the basis of its offer price.

E.5 SUBMISSION OF PROPOSALS

Proposals shall be sent to OAG.businessopportunities@dc.gov electronically to be received by 10:00 a.m. April 1, 2019.

F. EVALUATION CRITERIA

The District intends to award a single contract resulting from this RFTOP to the responsible Offeror whose offer is most advantageous to the District considering proposed prices, technical and other factors in this solicitation. The evaluation criteria below will be used to conduct the technical evaluation of proposals submitted in response to this RFTOP.

F.1 TECHNICAL CRITERIA (80 Points Maximum)

F.1.1 TECHNICAL APPROACH – 30 POINTS

F.1.1.1 The Offeror must provide a detailed Project Plan describing how it proposes to fulfil each of the requirements set forth in Section C.3.1, Phase I- Assessment. **(15 points)**

F.1.1.2 The Offeror must provide a detailed Implementation Plan describing how it proposes to fulfil each of the requirements set forth in Section C.3.2, Phase II- Implementation. **(15 points)**

F.1.2 EXPERIENCE AND QUALIFICATIONS OF PERSONNEL (25 POINTS)

F.1.2.1 The District will evaluate the extent to which the Offeror proposes personnel with experience in evaluating IV-D operations and implementing changes to IV-D programs that have proven to streamline program operations and improve the efficiency and overall productivity of these programs. **(15 points)**

F.1.2.2 The District will evaluate the submitted resumes and professional qualifications of the proposed personnel to determine the extent to which they possess the qualifications and relevant experience to successfully fulfill the requirements of the Statement of Work. **(10 points)**

F.1.3 PAST PERFORMANCE – 25 POINTS

OAG will assess the Contractor's past performance, determined to be relevant, to assess (listed in descending order of importance):

- (1) Technical, including quality of service delivery and consistency in meeting project goals and objectives.
- (2) Schedule, including the timeliness in completing contract requirements, meeting project milestones and delivery schedules, and timely completion of administrative requirements (e.g., efforts that contribute to or affect the schedule variance).
- (3) Management or business relations, addressing the history of professional behavior and overall business-like concern for the interests of the customer, including the offeror's history of reasonable and cooperative behavior (to include timely identification of issues in controversy), customer satisfaction, timely award and management of subcontracts, as well as cooperative attitude in remedying problems.

F.2 PRICE EVALUATION – 20 POINTS

F.2.1 The price evaluation will be objective. The offeror with the lowest realistic price for each line item will receive the maximum price points (20 Points). All other proposals will receive a proportionately lower price score.

F.2.2 Example:

$$\frac{\text{Grand total of lowest proposal price offered}}{\text{Grand total of proposal being evaluated}} \times 20 = \text{Evaluated Price Score}$$

F.3 PREFERENCES FOR CERTIFIED BUSINESS ENTERPRISES

Under the provisions of the “Small and Certified Business Enterprise Development and Assistance Act of 2014”, D.C. Official Code § 2-218.01 *et seq.*, as amended (“Act”, as used in this section), the District shall apply preferences in evaluating proposals from businesses that are certified by the Department of Small and Local Business Development (DSLBD) pursuant to Part D of the Act.

F.4 SUBCONTRACTING REQUIREMENTS

F.4.1 Mandatory Subcontracting Requirements

F.4.1.1 For contracts in excess of \$250,000, at least 35% of the dollar volume shall be subcontracted to certified small business enterprises; provided, however, that the costs of materials, goods, and supplies shall not be counted towards the 35% subcontracting requirement unless such materials, goods and supplies are purchased from certified small business enterprises.

F.4.1.2 If there are insufficient qualified small business enterprises to completely fulfill the requirement of Sec. F.4.1.1, then the subcontracting may be satisfied by subcontracting 35% of the dollar volume to any certified business enterprises; provided, however, that all reasonable efforts shall be made to ensure that qualified small business enterprises are significant participants in the overall subcontracting work.

F.4.1.3 A prime contractor which is certified as a small, local or disadvantaged business enterprise shall not be required to comply with the provisions of sections F.4.1.1 and F.4.1.2.

F.4.2 Subcontracting Plan

If the prime contractor is required by law to subcontract under this contract, it must subcontract at least 35% of the dollar volume of this contract in accordance with the provisions of section F.4.1. The prime contractor responding to this solicitation which

is required to subcontract shall be required to submit with its proposal, a notarized statement detailing its subcontracting plan. Proposals responding to this solicitation shall be deemed nonresponsive and shall be rejected if the Offeror is required to subcontract, but fails to submit a subcontracting plan with its proposal. Once the plan is approved by the CO, changes to the plan will only occur with the prior written approval of the CO and the Director of DSLBD. Each subcontracting plan shall include the following:

- (1) A description of the goods and services to be provided by SBEs or, if insufficient qualified SBEs are available, by any certified business enterprises;
- (2) A statement of the dollar value of the bid that pertains to the subcontracts to be performed by the SBEs or, if insufficient qualified SBEs are available, by any certified business enterprises;
- (3) The names and addresses of all proposed subcontractors who are SBEs or, if insufficient SBEs are available, who are certified business enterprises;
- (4) The name of the individual employed by the prime contractor who will administer the subcontracting plan, and a description of the duties of the individual;
- (5) A description of the efforts the prime contractor will make to ensure that SBEs, or, if insufficient SBEs are available, that certified business enterprises will have an equitable opportunity to compete for subcontracts;
- (6) In all subcontracts that offer further subcontracting opportunities, assurances that the prime contractor will include a statement, approved by the contracting officer, that the subcontractor will adopt a subcontracting plan similar to the subcontracting plan required by the contract;
- (7) Assurances that the prime contractor will cooperate in any studies or surveys that may be required by the contracting officer, and submit periodic reports, as requested by the contracting officer, to allow the District to determine the extent of compliance by the prime contractor with the subcontracting plan;
- (8) A list of the type of records the prime contractor will maintain to demonstrate procedures adopted to comply with the requirements set forth in the subcontracting plan, and assurances that the prime contractor will make such records available for review upon the District's request; and
- (9) A description of the prime contractor's recent effort to locate SBEs or, if insufficient SBEs are available, certified business enterprises, and to award subcontracts to them.

F.4.3 Subcontracting Plan Compliance Reporting. If the Contractor has an approved subcontracting plan required by law under this contract, the Contractor shall submit to the CO and the Director of DSLBD, no later than the 21st of each month following execution of the contract, a Subcontracting Plan Compliance Report to verify its compliance with the subcontracting requirements for the preceding month. The monthly subcontracting plan compliance report shall include the following information:

- (1) The dollar amount of the contract or procurement;
- (2) A brief description of the goods procured or the services contracted for;
- (3) The name of the business enterprise from which the goods were procured or services contracted;
- (4) Whether the subcontractors to the contract are currently certified business enterprises;
- (5) The dollar percentage of the contract awarded to SBEs, or if insufficient SBEs, to other certified business enterprises;
- (6) A description of the activities the Contractor engaged in, in order to achieve the subcontracting requirements set forth in its plan; and
- (7) A description of any changes to the activities the Contractor intends to make by the next month to achieve the requirements set forth in its plan.

F.4.4 Subcontractor Standards

F.4.4.1 A prime contractor shall ensure that subcontractors meet the criteria for responsibility described in D.C. Official Code § 2-353.01.

F.4.5 Enforcement and Penalties for Breach of Subcontracting Plan

F.4.5.1 If during the performance of this contract, the Contractor fails to comply with its approved subcontracting plan, and the CO determines the Contractor's failure to be a material breach of the contract, the CO shall have cause to terminate the contract under the default clause of the Standard Contract Provisions.

F.4.5.2 There shall be a rebuttable presumption that a contractor willfully breached its approved subcontracting plan if the contractor (i) fails to submit any required monitoring or compliance report; or (ii) submits a monitoring or compliance report with the intent to defraud.

F.4.5.3 A contractor that is found to have willfully breached its approved subcontracting plan for utilization of certified business enterprises in the performance of a contract shall be subject to the imposition of penalties, including monetary fines of \$15,000 or 5% of the total amount of the work that the contractor was to subcontract to certified business enterprises, whichever is greater, for each such breach.

F.5 EVALUATION OF OPTION YEARS

The District will evaluate offers for award purposes by evaluating the total price for all options as well as the base year. Evaluation of options shall not obligate the District to exercise them. The total District's requirements may change during the option years. Services to be awarded will be determined at the time each option is exercised.