

**UNITED STATES TRANSPORTATION COMMAND
(USTRANSCOM)**

**Contract HTC711-07-D-0011-0002
Modification 01**

**Portfolio Management & Information Technology
Investment Strategies Support**

International Business Machines (IBM) Corporation

AMENDMENT OF SOLICITATION/MODIFICATION OF CONTRACT				1. CONTRACT ID CODE Z	PAGE OF PAGES 1 11
2. AMENDMENT/MODIFICATION NO. 01	3. EFFECTIVE DATE 01-Oct-2009	4. REQUISITION/PURCHASE REQ. NO. SEE SCHEDULE	5. PROJECT NO. (If applicable)		
6. ISSUED BY CODE HTC711 USTRANSCOM-AQ - HTC711 508 SCOTT DR SCOTT AFB IL 62225-5357	7. ADMINISTERED BY (If other than item 6) CODE See Item 6				
8. NAME AND ADDRESS OF CONTRACTOR (No., Street, County, State and Zip Code) INTERNATIONAL BUSINESS MACHINES CORPORAT (b)(6) 12802 FEDERAL SYSTEMS PAR FAIRFAX VA 22033-4421				9A. AMENDMENT OF SOLICITATION NO.	
CODE 0K670 FACILITY CODE 0K670				9B. DATED (SEE ITEM 11)	
				X 10A. MOD. OF CONTRACT/ORDER NO. HTC711-07-D-0011-0002	
				X 10B. DATED (SEE ITEM 13) 15-Dec-2008	
11. THIS ITEM ONLY APPLIES TO AMENDMENTS OF SOLICITATIONS					
<input type="checkbox"/> The above numbered solicitation is amended as set forth in Item 14. The hour and date specified for receipt of Offer <input type="checkbox"/> is extended, <input type="checkbox"/> is not extended. Offer must acknowledge receipt of this amendment prior to the hour and date specified in the solicitation or as amended by one of the following methods: (a) By completing Items 8 and 15, and returning _____ copies of the amendment; (b) By acknowledging receipt of this amendment on each copy of the offer submitted; or (c) By separate letter or telegram which includes a reference to the solicitation and amendment numbers. FAILURE OF YOUR ACKNOWLEDGMENT TO BE RECEIVED AT THE PLACE DESIGNATED FOR THE RECEIPT OF OFFERS PRIOR TO THE HOUR AND DATE SPECIFIED MAY RESULT IN REJECTION OF YOUR OFFER. If by virtue of this amendment you desire to change an offer already submitted, such change may be made by telegram or letter, provided each telegram or letter makes reference to the solicitation and this amendment, and is received prior to the opening hour and date specified.					
12. ACCOUNTING AND APPROPRIATION DATA (If required) See Schedule					
13. THIS ITEM APPLIES ONLY TO MODIFICATIONS OF CONTRACTS/ORDERS IT MODIFIES THE CONTRACT/ORDER NO. AS DESCRIBED IN ITEM 14.					
A. THIS CHANGE ORDER IS ISSUED PURSUANT TO: (Specify authority) THE CHANGES SET FORTH IN ITEM 14 ARE MADE IN THE CONTRACT ORDER NO. IN ITEM 10A.					
B. THE ABOVE NUMBERED CONTRACT/ORDER IS MODIFIED TO REFLECT THE ADMINISTRATIVE CHANGES (such as changes in paying office, appropriation date, etc.) SET FORTH IN ITEM 14, PURSUANT TO THE AUTHORITY OF FAR 43.103(B).					
C. THIS SUPPLEMENTAL AGREEMENT IS ENTERED INTO PURSUANT TO AUTHORITY OF:					
X D. OTHER (Specify type of modification and authority) FAR 52.217-9 Option to Extend the Term of the Contract					
E. IMPORTANT: Contractor <input checked="" type="checkbox"/> is not, <input type="checkbox"/> is required to sign this document and return _____ copies to the issuing office.					
14. DESCRIPTION OF AMENDMENT/MODIFICATION (Organized by UCF section headings, including solicitation/contract subject matter where feasible.) Modification Control Number: tcchiljw092448 This unilateral action exercises option period one, 1 October 2009 - 30 September 2010. As a result of this action SLINs 100101, 100201, 100301, 100401, 100501, 100601, 100701, 100801, and 100901 are added to fund their respective option CLINs. The total funding is hereby increased by \$8,050,340.03. The POC for this action is Jamie Hill who can be reached at 618-256-9613 or James.Hill@ustranscom.mil					
Except as provided herein, all terms and conditions of the document referenced in Item 9A or 10A, as heretofore changed, remains unchanged and in full force and effect.					
15A. NAME AND TITLE OF SIGNER (Type or print)			16A. NAME AND TITLE OF CONTRACTING OFFICER (Type or print) LISA A. GROSS / CONTRACTING OFFICER TEL: 618-256-6259 EMAIL: Lisa.Gross@ustranscom.mil		
15B. CONTRACTOR/OFFEROR (Signature of person authorized to sign)	15C. DATE SIGNED	16B. UNITED STATES OF AMERICA BY <u><i>Lisa A. Gross</i></u> (Signature of Contracting Officer)		16C. DATE SIGNED 01-Oct-2009	

SECTION SF 30 BLOCK 14 CONTINUATION PAGE

SUMMARY OF CHANGES

SECTION SF 1449 - CONTINUATION SHEET

SOLICITATION/CONTRACT FORM

The total cost of this contract was increased by \$8,050,340.03 from \$5,883,435.52 to \$13,933,775.55.

SUPPLIES OR SERVICES AND PRICES

CLIN 1001

The option status has changed from Option to Option Exercised.

CLIN 1002

The option status has changed from Option to Option Exercised.

CLIN 1003

The option status has changed from Option to Option Exercised.

CLIN 1004

The option status has changed from Option to Option Exercised.

CLIN 1005

The option status has changed from Option to Option Exercised.

CLIN 1006

The option status has changed from Option to Option Exercised.

CLIN 1007

The option status has changed from Option to Option Exercised.

CLIN 1008

The option status has changed from Option to Option Exercised.

CLIN 1009

The option status has changed from Option to Option Exercised.

SUBCLIN 100101 is added as follows:

ITEM NO	SUPPLIES/SERVICES	ESTIMATED QUANTITY	UNIT	UNIT PRICE	AMOUNT
100101	Funding for CLIN 1001 LH DPO TWCF Ops Period of Performance: 1 October 2009 - 30 September 2010 FOB: Destination PURCHASE REQUEST NUMBER: F3ST959082A901 PROJECT: 000 SIGNAL CODE: A	1	Lot		
TOT ESTIMATED PRICE					\$0.00
CEILING PRICE					\$0.00
ACRN AE CIN: F3ST959082A9010000AA					\$5,965,326.97

SUBCLIN 100201 is added as follows:

ITEM NO	SUPPLIES/SERVICES	ESTIMATED QUANTITY	UNIT	UNIT PRICE	AMOUNT
100201	Funding for CLIN 1002 LH TWCF Ops Non-IT Period of Performance: 1 October 2009 - 30 September 2010 FOB: Destination PURCHASE REQUEST NUMBER: F3ST959082A901 PROJECT: 000 SIGNAL CODE: A	1	Lot		
TOT ESTIMATED PRICE					\$0.00
CEILING PRICE					\$0.00
ACRN AD CIN: F3ST959082A9010000AC					\$235,465.15

SUBCLIN 100301 is added as follows:

ITEM NO	SUPPLIES/SERVICES	ESTIMATED QUANTITY	UNIT	UNIT PRICE	AMOUNT
100301	Funding for CLIN 1003 LH TWCF Ops C4S Period of Performance: 1 October 2009 - 30 September 2010 FOB: Destination PURCHASE REQUEST NUMBER: F3ST959082A901 PROJECT: 000 SIGNAL CODE: A	1	Lot		
TOT ESTIMATED PRICE					\$0.00
CEILING PRICE					\$0.00
ACRN AF CIN: F3ST959082A9010000AB					\$512,895.75

SUBCLIN 100401 is added as follows:

ITEM NO	SUPPLIES/SERVICES	ESTIMATED QUANTITY	UNIT	UNIT PRICE	AMOUNT
100401	Funding for CLIN 1004 LH TWCF Ops Non-IT Period of Performance: 1 October 2009 - 30 September 2010 FOB: Destination PURCHASE REQUEST NUMBER: F3ST959082A901 SIGNAL CODE: A				
TOT ESTIMATED PRICE					\$0.00
CEILING PRICE					\$0.00
ACRN AD CIN: F3ST959082A9010000AC					\$48,468.64

SUBCLIN 100501 is added as follows:

ITEM NO	SUPPLIES/SERVICES	ESTIMATED QUANTITY	UNIT	UNIT PRICE	AMOUNT
100501	Funding for CLIN 1005 LH DPO TWCF Ops Period of Performance: 1 October 2009 - 30 September 2010 FOB: Destination PURCHASE REQUEST NUMBER: F3ST959082A901 SIGNAL CODE: A				
				TOT ESTIMATED PRICE	\$0.00
				CEILING PRICE	\$0.00
	ACRN AE CIN: F3ST959082A9010000AA				\$470,930.29

SUBCLIN 100601 is added as follows:

ITEM NO	SUPPLIES/SERVICES	ESTIMATED QUANTITY	UNIT	UNIT PRICE	AMOUNT
100601	Funding for CLIN 1006 LH DPO TWCF Ops Period of Performance: 1 October 2009 - 30 September 2010 FOB: Destination PURCHASE REQUEST NUMBER: F3ST959082A901 SIGNAL CODE: A				
				TOT ESTIMATED PRICE	\$0.00
				CEILING PRICE	\$0.00
	ACRN AE CIN: F3ST959082A9010000AA				\$316,295.52

SUBCLIN 100701 is added as follows:

ITEM NO	SUPPLIES/SERVICES	ESTIMATED QUANTITY	UNIT	UNIT PRICE	AMOUNT
100701	Funding for CLIN 1007 LH TWCF Ops C4S Period of Performance: 1 October 2009 - 30 September 2010 FOB: Destination PURCHASE REQUEST NUMBER: F3ST959082A901 SIGNAL CODE: A				
				TOT ESTIMATED PRICE	\$0.00
				CEILING PRICE	\$0.00
	ACRN AF CIN: F3ST959082A9010000AB				\$259,591.50

SUBCLIN 100801 is added as follows:

ITEM NO	SUPPLIES/SERVICES	ESTIMATED QUANTITY	UNIT	UNIT PRICE	AMOUNT
100801	Funding for CLIN 1008 LH TWCF Ops C4S Period of Performance: 1 October 2009 - 30 September 2010 FOB: Destination PURCHASE REQUEST NUMBER: F3ST959082A901 SIGNAL CODE: A				
				TOT ESTIMATED PRICE	\$0.00
				CEILING PRICE	\$0.00
	ACRN AF CIN: F3ST959082A9010000AB				\$11,366.21

SUBCLIN 100901 is added as follows:

ITEM NO	SUPPLIES/SERVICES	QUANTITY	UNIT	UNIT PRICE	AMOUNT
100901	Funding for CLIN 1009 COST DPO TWCF Ops Period of Performance: 1 October 2009 - 30 September 2010 FOB: Destination PURCHASE REQUEST NUMBER: F3ST959082A901 PROJECT: 000 SIGNAL CODE: A		Lot		\$0.00
				ESTIMATED COST	\$0.00
	ACRN AE CIN: F3ST959082A9010000AA				\$230,000.00

ACCOUNTING AND APPROPRIATION

Summary for the Payment Office

As a result of this modification, the total funded amount for this document was increased by \$8,050,340.03 from \$5,883,435.52 to \$13,933,775.55.

SUBCLIN 100101:

Funding on SUBCLIN 100101 is initiated as follows:

ACRN: AE

CIN: F3ST959082A9010000AA

Acctng Data: 97X4930.FD50 6F0 70AB 124080 G62X00 43910 000000 667100 F67100 ESP:PD

Increase: \$5,965,326.97

Total: \$5,965,326.97

SUBCLIN 100201:

Funding on SUBCLIN 100201 is initiated as follows:

ACRN: AD

CIN: F3ST959082A9010000AC

Acctng Data: 97X4930.FD50 6F0 70AB 124020 G64K00 43910 000000 667100 F67100

Increase: \$235,465.15

Total: \$235,465.15

SUBCLIN 100301:

Funding on SUBCLIN 100301 is initiated as follows:

ACRN: AF

CIN: F3ST959082A9010000AB

Acctng Data: 97X4930.FD50 6F0 70AB 128130 G642G0 43910 000000 667100 F67100

Increase: \$512,895.75

Total: \$512,895.75

SUBCLIN 100401:

Funding on SUBCLIN 100401 is initiated as follows:

ACRN: AD

CIN: F3ST959082A9010000AC

Acctng Data: 97X4930.FD50 6F0 70AB 124020 G64K00 43910 000000 667100 F67100

Increase: \$48,468.64

Total: \$48,468.64

SUBCLIN 100501:

Funding on SUBCLIN 100501 is initiated as follows:

ACRN: AE

CIN: F3ST959082A9010000AA

Acctng Data: 97X4930.FD50 6F0 70AB 124080 G62X00 43910 000000 667100 F67100 ESP:PD

Increase: \$470,930.29

Total: \$470,930.29

SUBCLIN 100601:

Funding on SUBCLIN 100601 is initiated as follows:

ACRN: AE

CIN: F3ST959082A9010000AA

Acctng Data: 97X4930.FD50 6F0 70AB 124080 G62X00 43910 000000 667100 F67100 ESP:PD

Increase: \$316,295.52

Total: \$316,295.52

SUBCLIN 100701:

Funding on SUBCLIN 100701 is initiated as follows:

ACRN: AF

CIN: F3ST959082A9010000AB

Acctng Data: 97X4930.FD50 6F0 70AB 128130 G642G0 43910 000000 667100 F67100

Increase: \$259,591.50

Total: \$259,591.50

SUBCLIN 100801:

Funding on SUBCLIN 100801 is initiated as follows:

ACRN: AF

CIN: F3ST959082A9010000AB

Acctng Data: 97X4930.FD50 6F0 70AB 128130 G642G0 43910 000000 667100 F67100

Increase: \$11,366.21

Total: \$11,366.21

SUBCLIN 100901:

Funding on SUBCLIN 100901 is initiated as follows:

ACRN: AE

CIN: F3ST959082A9010000AA

Acctng Data: 97X4930.FD50 6F0 70AB 124080 G62X00 43910 000000 667100 F67100 ESP:PD

Increase: \$230,000.00

Total: \$230,000.00

DELIVERIES AND PERFORMANCE

The following Delivery Schedule item has been added to SUBCLIN 100401:

DELIVERY DATE	QUANTITY	SHIP TO ADDRESS	UIC
POP 01-OCT-2009 TO 30-SEP-2010	N/A	USTC/J6 - F3ST95 CAMPOS, RHONDA 508 SCOTT DR SCOTT AFB IL 62225-5357 618-229-3183 FOB: Destination	F3ST95

The following Delivery Schedule item has been added to SUBCLIN 100501:

DELIVERY DATE	QUANTITY	SHIP TO ADDRESS	UIC
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POP 01-OCT-2009 TO
30-SEP-2010

N/A

USTC/J6 - F3ST95
CAMPOS, RHONDA
508 SCOTT DR
SCOTT AFB IL 62225-5357
618-229-3183
FOB: Destination

F3ST95

The following Delivery Schedule item has been added to SUBCLIN 100601:

DELIVERY DATE

QUANTITY

SHIP TO ADDRESS

UIC

POP 01-OCT-2009 TO
30-SEP-2010

N/A

USTC/J6 - F3ST95
CAMPOS, RHONDA
508 SCOTT DR
SCOTT AFB IL 62225-5357
618-229-3183
FOB: Destination

F3ST95

The following Delivery Schedule item has been added to SUBCLIN 100701:

DELIVERY DATE

QUANTITY

SHIP TO ADDRESS

UIC

POP 01-OCT-2009 TO
30-SEP-2010

N/A

USTC/J6 - F3ST95
CAMPOS, RHONDA
508 SCOTT DR
SCOTT AFB IL 62225-5357
618-229-3183
FOB: Destination

F3ST95

The following Delivery Schedule item has been added to SUBCLIN 100801:

DELIVERY DATE

QUANTITY

SHIP TO ADDRESS

UIC

POP 01-OCT-2009 TO
30-SEP-2010

N/A

USTC/J6 - F3ST95
CAMPOS, RHONDA
508 SCOTT DR
SCOTT AFB IL 62225-5357
618-229-3183
FOB: Destination

F3ST95

INSPECTION AND ACCEPTANCE

The following Acceptance/Inspection Schedule was added for SUBCLIN 100101:

INSPECT AT
Destination

INSPECT BY
Government

ACCEPT AT
Destination

ACCEPT BY
Government

The following Acceptance/Inspection Schedule was added for SUBCLIN 100201:

INSPECT AT
Destination

INSPECT BY
Government

ACCEPT AT
Destination

ACCEPT BY
Government

The following Acceptance/Inspection Schedule was added for SUBCLIN 100301:

INSPECT AT	INSPECT BY	ACCEPT AT	ACCEPT BY
Destination	Government	Destination	Government

The following Acceptance/Inspection Schedule was added for SUBCLIN 100401:

INSPECT AT	INSPECT BY	ACCEPT AT	ACCEPT BY
N/A	N/A	N/A	Government

The following Acceptance/Inspection Schedule was added for SUBCLIN 100501:

INSPECT AT	INSPECT BY	ACCEPT AT	ACCEPT BY
N/A	N/A	N/A	Government

The following Acceptance/Inspection Schedule was added for SUBCLIN 100601:

INSPECT AT	INSPECT BY	ACCEPT AT	ACCEPT BY
N/A	N/A	N/A	Government

The following Acceptance/Inspection Schedule was added for SUBCLIN 100701:

INSPECT AT	INSPECT BY	ACCEPT AT	ACCEPT BY
N/A	N/A	N/A	Government

The following Acceptance/Inspection Schedule was added for SUBCLIN 100801:

INSPECT AT	INSPECT BY	ACCEPT AT	ACCEPT BY
N/A	N/A	N/A	Government

The following Acceptance/Inspection Schedule was added for SUBCLIN 100901:

INSPECT AT	INSPECT BY	ACCEPT AT	ACCEPT BY
Destination	Government	Destination	Government

(End of Summary of Changes)

**PERFORMANCE WORK STATEMENT FOR
UNITED STATES TRANSPORTATION COMMAND
COMMAND, CONTROL, COMMUNICATIONS AND COMPUTER SYSTEMS
DIRECTORATE (TCJ6)**

**PORTFOLIO MANAGEMENT AND INFORMATION TECHNOLOGY INVESTMENT
STRATEGIES SUPPORT**



8 December 2008

PERFORMANCE WORK STATEMENT
FOR UNITED STATES TRANSPORTATION COMMAND
COMMAND, CONTROL, COMMUNICATIONS & COMPUTER SYSTEMS DIRECTORATE
(TCJ6), IT POLICY AND DISTRIBUTION PORTFOLIO MANAGEMENT DIVISION
FOR PORTFOLIO MANAGEMENT AND INFORMATION TECHNOLOGY INVESTMENT
STRATEGIES SUPPORT

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PERFORMANCE WORK STATEMENT

1. DESCRIPTION OF SERVICES

1.1 Background. The United States Transportation Command (USTRANSCOM) mission is to provide air, land and sea distribution for the Department of Defense (DOD), both during peace and war. The Commander of USTRANSCOM is tasked as the single manager of the Defense Distribution System (DDS). An important functional requirement is the integration of the Transportation Component Commands (TCCs): Military Sealift Command (MSC), HQ Air Mobility Command (AMC), and Military Surface Deployment and Distribution Command (SDDC). Distribution analysis and Corporate Services thread through the various TCJ6 projects, ensuring effectiveness and efficiencies are documented for decision making through out the DOD.

1.2 Objective. The primary objective of this PWS is to provide support for Portfolio Management (PfM), Chief Information Officer (CIO), Corporate Services Vision (CSV), and Information Technology (IT) Investment Management activities for USTRANSCOM. CSV represents the vision by which USTRANSCOM will fulfill its role as Distribution Portfolio Manager by transforming from a vertical, systems-oriented approach to horizontal, enterprise services-oriented portfolio management approach. The contractor shall provide functional, technical, and financial analysis for the development and maintenance of PfM and IT Investment Management processes for two organizational levels.

The first organizational level shall be for USTRANSCOM and its component commands of MSC, AMC and SDDC. The collection of IT systems, projects, and initiatives for this first grouping is referred to as Defense Transportation System (DTS)-wide. The DTS-wide systems, programs, and initiatives are under the direct control of USTRANSCOM via the Transportation Working Capital Fund (TWCF).

The second organizational level is for the collection of IT systems, projects, and initiatives across the DOD that are of significant interest to USTRANSCOM. This collection is referred to as DOD-wide. The DOD-wide systems, programs, and initiatives are under indirect control by USTRANSCOM via mechanisms such as the Distribution Process Owner (DPO) and DOD Business Systems Investment Review Boards (IRBs).

PfM and IT investment management processes for both organizational levels are often interrelated and require dependencies, integration and close coordination across levels.

As part of the support for the PfM and IT Investment Management processes, the contractor shall provide support to numerous activities such as the Corporate Portfolio Review Process (CPRP), Joint Capabilities Integration and Development System (JCIDS) processes, the Defense Business Systems Management Committee (DBSMC), the Distribution Portfolio Management process, the Distribution Steering Group (DSG), IRBs, and various USTRANSCOM workshops. The contractor shall also provide support for the Enterprise Requirements Management (ERM) program to include PfM for USTRANSCOM at all levels within DOD as required by evolving directives. The contractor shall provide support for the management of corporate cross-functional review of Automated Information Systems (AIS) supporting DBSMC and data packages in support of IRBs for the Office of the Secretary of Defense (OSD) for Acquisition Technology & Logistics (AT&L) guidelines for system funding approval. This PWS provides direct expertise and technical support for complex, direct, near- and long-term strategic, functional, and operational planning capabilities, policies, processes, architectures, performance metrics, systems, and standards in support of USTRANSCOM Directorate of Command, Control, Communications and Computer Systems (TCJ6) and joint interoperability concepts, standards, and specifications established in DOD directives, policies and guidance.

The contractor must be familiar and experienced in USTRANSCOM's role as Distribution Process Owner as described in the most current DOD Instruction 5158.06 titled Distribution Process Owner. The contractor must be familiar and experienced in the development and maintenance of the Defense PFM processes, strategies, and activities as described in the most current DOD Directive 8115.01 titled Information Technology Portfolio Management, and DOD 8115.02 Instruction titled Information Technology Portfolio Management Implementation. The contractor must also be familiar and experienced in the development and maintenance of the CIO processes, strategies, and activities as described in the E-Government Act of 2002 (Public Law 107-347), December 17, 2002; the Paperwork Reduction Act (Public Law 104-13, Chapter 35 of title 44, United States Code); Section 3541 of title 44, United States Code, "Federal Information Security Management Act (FISMA) of 2002"; DoD Directive 8000.1, Management of DoD Information Resources and Information Technology; and the Clinger-Cohen Act (CCA) of 1996. The Federal Acquisition Reform Act (Division D of Public Law 104-106) and the Information Technology Management Reform Act (Division E of Public Law 104-106) were signed into law as part of the National Defense Authorization Act for Fiscal Year 1996 and were subsequently designated the CCA of 1996. The contractor must be familiar with current memorandums, directives, and instructions issued in support of the above laws, directives, and instructions. The contractor shall be familiar with the Corporate Resource Information Source (CRIS) ORACLE database structure, CRIS web applications, and NetViz graphics software used to portray Enterprise Architecture (EA) products.

1.3 Scope. The contractor shall plan for all tasks identified in this task order, and gather all pertinent information. Contractor estimates and timelines shall be determined based on the deliverable due dates specified in each task. The contractor shall coordinate with the Government to ensure that all activities are well synchronized and integrated with other USTRANSCOM and distribution management efforts, and that replicated or overlapping efforts do not occur. All reports, studies, or policies identified in the PWS to be accomplished shall be prepared and submitted for Government approval.

The specific tasks are:

- Task Area 1: Contract-Level and Task Order Management
- Task Area 2: Defense Transportation System (DTS) Wide Portfolio Management Support
- Task Area 3: DOD-Wide Distribution Portfolio Management Support
- Task Area 4: DOD-Wide Distribution Portfolio Management Focus Area Analysis Support
- Task Area 5: Enterprise Requirements Management Process Support
- Task Area 6: DPfM CSV Governance Support
- Task Area 7: Corporate Portfolio Review Process (CPRP)
- Task Area 8: CIO Support (Optional Task)
- Task Area 9: Strategic Planning and Reporting/Enterprise Transition Planning and Reporting
- Task Area 10: Functional Area Communications and Computer Systems Manager (FACCSM) Support (Optional Task)
- Task Area 11: Technical Assessment
- Task Area 12: Strategic, Functional, and Operational Plans and Policy Support
- Task Area 13: Groupware Workshop Support

1.4 Specific Tasks.

1.4.1 Task Area 1: Contract Level and Task Order Management. This task consists of the functional activities relating to the administration and management of this effort. The contractor shall provide program management of contractor personnel performing tasks in this task order. The contractor shall designate a principal point of contact for technical issues.

The contractor shall provide a centralized program management capability at the contractor site. This function shall encompass administrative, clerical, documentation and related functions that provide general support for the program.

The contractor shall provide support by preparing documents such as briefings, point papers, and meeting minutes related to status of the performance of this task order.

The contractor shall be required to provide support in the specific areas outlined below in this PWS. The contractor shall work with the CIO and Distribution Portfolio Management Division, process owners/stakeholders, Federal and DOD Government representatives, and other contractors to accomplish these tasks.

All decisions regarding Government requirements or Government actions shall be made by Government personnel and the contractor's representative shall submit evaluations, recommendations, etc. to the Contracting Officer's Representative (COR) and/or Contracting Officer for further action.

1.4.1.1 Task 1 Subtask 1: Task Order Management Plan. The contractor shall prepare an integrated (i.e., Government and contractor) project plan that defines tasks, resources, and dependencies. The plan should also describe the technical approach, organizational resources, and management controls to be employed to meet the cost, performance, and schedule requirements throughout contract execution. The draft plan shall be submitted within fifteen (15) business days of task order start date. The Government will review the plan and provide comments to the contractor. The contractor will have five (5) business days from receipt of the Government's comments to submit the final plan. The plan should not be merely a reiteration of the PWS requirements.

1.4.1.2 Task 1 Subtask 2: Monthly Status Report (MSR). The contractor shall provide a Monthly Status Report (MSR) monitoring the quality assurance and configuration management. The status report shall list, by each active task/project area, the accomplishments of the reporting period by contractor name. The report should contain labor hours/costs by major project area and individual. The MSR should outline the current funding status and a brief synopsis of the efforts completed, deliverables provided, and conferences and trips conducted/attended during the reporting period, and an overall evaluation of the task order to date. Estimated and actual travel costs shall be reported by contractor name, trip location and purpose, and dates of travel. The report shall list the deliverables for each task and any issues, problem areas, and items that require Government action. The MSR is due no later than the 5th business day of each month.

1.4.1.3 Task 1 Subtask 3: Conduct In-Process Reviews (IPRs). The contractor shall conduct IPRs as scheduled by the Government for up to four IPRs during each period of performance summarizing status, progress, recommendations, and concerns in the development of any tasks or documentation described within this PWS. Presentation materials shall be prepared and provided to the COR five (5) business days prior to the IPR. The contractor shall deliver IPR minutes within five (5) business days as requested by the COR with a copy of the presentation slides used at the IPR. At a minimum, the minutes should reflect a record of discussion activity, decisions made, date, locations, and attendees.

1.4.1.4 Task 1 Subtask 4: Trip Reports. Within five (5) business days of completion of any travel, the contractor shall submit a trip report to include the following details: purpose, location and length of trip, travelers, and individuals contacted during trip, synopsis of all discussions, future actions identified, decisions made, or issues of concern arising during trip.

1.4.1.5 Task 1 Subtask 5: Employment Status Report. The contractor shall provide an employee status report containing names and labor categories of personnel supporting each major task. The report will be provided within thirty (30) calendar days after task order start date and within five (5) business days after any changes in personnel occur.

1.4.1.6 Task 1 Subtask 6: Weekly Activity Report. The contractor shall list, by each active task/project area, the accomplishments of the reporting period. Weekly activity reports should be provided by close of business each Wednesday to the corresponding branch chief to whom the activities are assigned.

1.4.2. Task Area 2: Defense Transportation System (DTS) Wide Portfolio Management

The contractor shall continue the evolution to further develop and document PFM oversight and policy for the DTS TWCF portfolio process. The contractor shall implement and conduct PFM activities for all new and changing DTS TWCF IT functional, technical, and resource requirements; system functionality; and mission capabilities. The contractor shall provide all support associated with the DTS portfolio process to include cross portfolio analysis for duplications and gaps, and system functionality analysis to facilitate the analysis and evaluation of IT systems requirements and capabilities for USTRANSCOM mission and strategic planning contribution and applicability. The contractor shall update, refine, and publish the USTRANSCOM PFM Handbook, Training Guide, and Trifolds within thirty (30) calendar days of tasking by the Government on an annual basis. The contractor shall use automated tools when feasible to collect and report architectural and program data. The contractor shall analyze and assist with implementation of automated tools that the Government evaluates or uses to collect and report architectural and program data in support of PFM, Program Managers (PMs), Technical Assessment (TA), Operational Assessment (OA), CPRP, CSV and strategic planning. The contractor shall provide all reports and recommendations associated with management of the DTS portfolios and the CPRP process to the COR. The contractor shall provide the capability to create and execute database retrievals from the CRIS repository or other USTRANSCOM repositories as required to support the PFM process and portfolio managers.

1.4.2.1 Task 2 Subtask 1: Operational Assessment (OA). (Optional Task) The Government's intent is to exercise this optional task based on funding availability. The Government reserves the right not to exercise this optional task. The contractor shall work with representatives from the TCJ6, other USTRANSCOM directorates, contractors, USTRANSCOM Component Commands, and DTS organizations to refine the methodology and business rules to support the OA process. The contractor shall accomplish a conceptual analysis assessing targeted Enterprise Infrastructure and operational capabilities provided by DTS systems and services in support of CPRP objectives. The contractor shall assist in resolving potential problems identified by the analysis. The contractor shall document the established repeatable methodology for accomplishing OA activities within forty-five (45) calendar days of Government tasking on an annual basis.

1.4.3 Task Area 3: DOD-Wide Distribution Portfolio Management

The contractor shall revise and keep updated the Distribution Portfolio Management (DPfM) Methodology for accomplishing the necessary processes, use of tools, and techniques required to gather and analyze the appropriate functional, technical, system, and financial information on DOD distribution IT systems in order to optimize investment decisions, to be consistent with the DPfM CSV governance and other Government direction. The contractor shall provide the support to implement and accomplish the plan as developed. The contractor shall develop an analysis plan to support these activities. The contractor shall develop and recommend a plan to establish performance metrics by which to evaluate the effectiveness of DPfM efforts. The contractor shall provide the plan within thirty (30) calendar days of

task order start date and the plan will be approved by the Government for implementation. The contractor shall provide the final plan within fifteen (15) business days of Government-provided comments. Further, the contractor shall support the integration of the performance metrics into the DPfM governance, policies, processes and operations to align DPfM activities with strategic goals and objectives. The contractor shall leverage other relevant work to accelerate development of the metrics. The contractor shall develop and document DPfM oversight and policy for the command DPfM process as it evolves. This will include recommendations for policy, business rules, content, and procedures. DPfM activities include: analyze, select, control, and evaluate systems by portfolio relative to mission capabilities, the CSV, and impact on performance. The contractor shall perform DPfM activities for all distribution and distribution-related IT systems as identified by the Government. The contractor shall conduct duplication analysis, gap analysis and performance impact assessment and provide solution recommendation as an appropriate conclusion to each of the phases of the DPfM process. The contractor shall implement and conduct DPfM activities for all new and changing IT functional, technical, and resource requirements; system functionality; and mission capabilities. The contractor shall accomplish enterprise-wide distribution portfolio analysis for duplications, gaps and performance impact.

The contractor shall provide the necessary trained and fully-qualified personnel to refine and consult on DPfM IT Investment Strategy & Management oversight and policy. The contractor shall develop, implement, and provide DPfM management support for IT funding strategies based on IT requirements, system functionality, mission capabilities, CSV, impact on performance and associated Enterprise Architecture (EA) Information Exchange Requirements. The contractor shall partner with the EA support contractor to ensure timely population of systems migration information to the EA System and Technical Views. The contractor shall ensure timely DPfM Interface to the current EA. The contractor shall coordinate with the Government to ensure financial and economic activities are well synchronized and integrated. The contractor shall provide the capability to create and execute distribution information database retrievals from CRIS or other repositories as required to support the DPfM process.

Contractor support shall include, but is not limited to providing consultation on cost/benefit estimation associated with DPO systems and process analysis cost estimation. The contractor shall perform analysis on approximately 250 distribution systems, and research and make recommendations on basic information needed to support management decision making. The contractor shall include, as appropriate, distribution data entries in standard format to be input into the database.

1.4.3.1 Task 3 Subtask 1: DPfM Support for Investment Review Board (IRB) and Defense Business System Management Committee (DBSMC). The contractor shall support DPfM IRB and DBSMC organizational and management requirements as directed by OSD. The contractor shall conduct a series of interviews with the appropriate Government and contractor personnel to determine what functional, technical, and financial information is required for the oversight activities, above and beyond what is collected by Government-directed data calls and for National Defense Authorization Act (NDAA) Certification. The contractor shall leverage existing data collection tools and tailor them to the Distribution Portfolio Management, Enterprise Requirements, and CSV efforts to provide executive summaries and trip books for the IRB and DBSMC meetings. The contractor shall provide DPfM administrative support for required management pre-briefs for the IRB and DBSMC meetings.

This effort will produce summary reports for the IRB. The contractor shall ensure quality, consistency, completeness, and timeliness of the information by following up on issues and data calls. The contractor shall populate the Business Transformation Agency (BTA) Portal and maintain data quality for support to the IRB within ten (10) business days of IRB and DBSMC monthly meetings. The contractor shall document results of the IRB boards to facilitate revisions prior to execution of next cycle. The contractor shall assist in implementing new distribution procedures using the CRIS database or other repositories as

determined by the Government, and provide functional subject matter experts to work with CRIS for distribution data updates.

1.4.3.2 Task 3 Subtask 2: Distribution Portfolio Management Functional Advisory Support. The contractor shall provide subject matter expertise to provide branch level functional advice and consultation regarding all DOD Wide Distribution Portfolio Management activities and DPfM focus area analysis efforts. The contractor shall assist the Government to ensure synchronization of all portfolio analysis activities and that recommendations align with corporate vision. The contractor shall support preparation of branch and directorate leadership on portfolio management activities for senior leader forums such as the Distribution Steering Group.

1.4.3.3 Task 3 Subtask 3: Distribution Portfolio Management Technical Advisory Support. The contractor shall provide additional subject matter expertise to provide branch level technical advice and consultation regarding all DOD Wide Distribution Portfolio Management activities and DPfM focus area analysis efforts. The contractor shall assist the Government to ensure synchronization of all portfolio analysis activities and that recommendations align with corporate vision.

1.4.4 Task Area 4: DOD-Wide Distribution Portfolio Management Focus Area Analysis Support

The command DPfM process is multi-faceted and includes an initial structure for focus area analysis including Supply Chain Operational Reference Model (SCOR) and the Joint Deployment and Distribution Enterprise (JDDE) Reference Architecture. This approach has been developed to facilitate an organized, structured approach to the initial analysis of distribution and logistics-related processes, activities, and supporting systems. Under separate contract, USTRANSCOM is developing a reference model architecture including conceptual, prescriptive, and transition architectures. The contractor shall become familiar with this new structure and be prepared to produce relevant documentation consistent with that approach.

1.4.4.1 Task 4 Subtask 1: DPfM Business Case Analysis Development. The contractor shall provide personnel to perform analysis for one DPfM focus area. The team shall conduct functional, technical and cost analysis for functional working group assessment and development of a Business Case Analysis for DSG or Government-directed DPfM areas of interest within ninety (90) calendar days of focus area establishment. The contractor shall provide workshop management activities support for the focus area analysis team. Workshops may have personnel matrixed in from EA and Enterprise Systems Engineering (ESE) to provide activity/system support for process mapping of activities with resulting reports, recommendations, and IT transition plans.

Support shall include, but is not limited to, providing consultation on cost/benefit estimation associated with distribution systems and process analysis. The contractor shall perform analysis on Government-identified DPfM focus area groups of systems, such as: SCOR level four classes of supply, or the DPO Reference Architecture. The contractor shall provide research and make recommendations on basic information needed to support management decision making. The contractor shall include, as appropriate, distribution system data entries in standard format to be input into the CRIS database or other Government directed repositories.

The contractor shall provide cost and financial analysis support to prepare various cost and economic analyses on distribution IT systems, initiatives, or concepts. This will include oversight and/or development of formal DPfM business case analyses for IT system transitions. This effort includes financial and technical support in developing graphics and associated documentation. It also includes periodic ad hoc cost and financial analysis support for special interest projects/IT systems.

The contractor shall provide continuous updates to all documentation associated with the DPfM business case analysis documentation as directed by the Government task manager.

1.4.4.2 Task 4 Subtask 2: Additional DPfM Business Case Analysis Support. (Optional Task).

The Government's intent is to exercise this optional task based on funding availability. The Government reserves the right not to exercise this optional task. The contractor shall provide technical and functional resources to duplicate the research, evaluation and solution development capability identified in Task 4, Subtask 1: DPfM Business Case Analysis Development. With the exercise of this optional task, the contractor shall have the resources to maintain capability to perform business case analysis on an additional and concurrent DPfM Government-directed focus area.

1.4.4.3 Task 4 Subtask 3: DPfM Implementation Support. The contractor shall provide technical expertise and consultative services for the implementation of solutions that have been recommended by the DPfM business case and accepted for implementation. The contractor shall oversee implementation of up to six (6) focus areas and associated business cases. The contractor shall develop an oversight plan for each new focus area/business case within fifteen (15) business days of Government direction. Oversight includes project management and coordination with various programs of record to accomplish focus area solution implementation. The contractor will support various meetings to include Source System Review Board (SSRB) and Common Operational Picture Deployment and Distribution (COP D2) Review Board (CRB) meetings and activities. SSRB and CRB meetings occur quarterly. The contractor shall support the planning and execution of these and other meetings with the following activities: preparing, coordinating, organizing planning meetings and pre-briefs, and conducting all follow-up to prepare and coordinate minutes and action items. The contractor shall facilitate meetings, conduct the administration, and support as necessary to include the completion of agendas, meeting briefing packages, seating arrangements, minutes, action items, and other documentation and status reports as necessary. The contractor shall support the completion of action items and agenda topics by coordinating with points of contact, conducting data gathering and analysis, and reporting status as required.

1.4.4.4 Task 4 Subtask 4: Additional DPfM Implementation Support. (Optional Task). The Government's intent is to exercise this optional task based on funding availability. The Government reserves the right not to exercise this optional task. The contractor shall provide functional and technical expertise to augment the capability identified in Task 4 Subtask 3: DPfM Implementation Support to perform implementation oversight of an additional two DPfM (2) focus areas and associated business case solutions accepted for implementation.

1.4.5 Task Area 5: Enterprise Requirements Management Process Support

In order to effectively fulfill its role as DPO and DPfM, USTRANSCOM has instituted the CSV which enables the receipt and analysis of all enterprise requirements. The intended result is the reduction in duplicative investment and capability across the distribution enterprise as well as the development of enterprise service solutions where appropriate. The contractor shall provide consultation and administrative support to the Enterprise Requirements Management process which provides a single entry point for visibility and management for all new requirements. New requirements are captured in an automated Requirements Management Tool and managed in phases, which have corresponding status conditions. The contractor shall provide updates to the tool's front end capabilities on an as-needed basis and ensure accuracy of those capabilities. The contractor shall ensure the requirements tool is updated with the status of all new requirements.

The contractor shall provide weekly reports and recommendations associated with management of the Enterprise Requirements Management process to the Government twenty-four (24) hours prior to the Enterprise Requirements Review Council (ERRC) Working Group (WG) meetings. The contractor shall support the planning and execution of the ERRC WG. The contractor shall support meetings with the following activities: preparing, coordinating, organizing, planning meetings, executing the meetings, capturing the minutes, and conducting all follow-up to prepare and coordinate minutes and action items. The contractor shall facilitate meetings, conduct the administration, and support as necessary to include the completion of agendas, meeting briefing packages, seating arrangements, minutes, action items, and other documentation and status reports as necessary. The contractor shall support the completion of action items by coordinating with points of contact, conducting data gathering and analysis, and reporting status as required. The contractor shall ensure accuracy of the distribution requirements data within the tool. The contractor shall provide the capability to create and execute distribution information database retrievals from the CRIS repository or other USTRANSCOM repositories as required to support the DPfM process and portfolio managers.

The contractor shall perform initial requirements management triage in accordance with Government-approved criteria, make recommendation to ERRC WG as to whether the requirement meets enterprise criteria, and assign to appropriate offices of responsibility for solution development. For those initial requirements determined to be non-enterprise, the contractor shall coordinate with the appropriate program manager and portfolio manager to determine assignment and required action.

In conjunction with the EA contractor performing congruency analysis on enterprise requirements, the contractor shall perform requirements refinement with functional proponent and analyze the requirement against current distribution portfolio capabilities. Contractor will engage with Government-identified ESE Group resources who will lead technical and engineering aspects of material solution determination for enterprise requirements and provide a recommended solution that provides best value consistent with Government priorities and prescriptive architecture. Engagement may include participation in various meetings such as the bi-weekly Architecture Integration Steering Group, as directed by the Government. The contractor shall provide the appropriate personnel to perform the functional and resource analysis elements of enterprise Requirements Solution Analysis. The contractor, with ESE Group technical support, shall develop solution analysis which includes all elements of command template for the Resource Allocation Package for presentation to the Enterprise Requirements Review Council and associated working group and shall be produced within fifteen (15) to thirty (30) business days as determined by the Government depending upon the complexity of the individual requirement.

1.4.6 Task Area 6: DPfM CSV Governance Support

The contractor shall develop, update, and maintain all DPfM CSV governance products, to include the Governance Conceptual and Prescriptive reference models on a monthly basis, no later than the 10th business day each month. These products include documents, presentations, meeting minutes, and architectural artifacts relating to DPfM Corporate Governance. The architectural products include, but are not limited to the Conceptual and Prescriptive Reference Models governance components which should be reviewed annually by the 1st of October each year. The contractor shall also review and evaluate any Corporate Services and Corporate Governance reference models to ensure that all governance aspects of these architectural artifacts are adequately integrated, and provide consolidated instructions that support the requirements of the DPfM portfolios. All DPfM CSV governance materials may require the contractor to collect information from Government designated subject matter experts. This process may also require the incorporation of material generated in working groups or extracted from meeting presentations. The contractor shall be expected to merge these products then assemble, review, edit, format, and publish all DPfM CSV governance material with Government oversight and

approval. The contractor shall also update and maintain a Government approved documentation methodology for this process.

1.4.7 Task Area 7: Corporate Portfolio Review Process (CPRP)

1.4.7.1 Task 7 Subtask 1: CPRP. This task ties the CIO Investment management process to the command's Corporate Portfolio Review Process. The contractor shall support the CSV Corporate Governance process with various methods of cost analysis, functional and technical expertise, planning, and administrative actions in order to sustain the Investment Management office. The primary mission of the Investment Management office is to integrate efforts associated with IT investment management activities. The contractor shall recommend policy, business rules, and procedures for Clinger-Cohen compliance in IT Investment Management. The contractor shall refine and manage IT Investment Strategy and IT Strategic Planning for the CPRP to ensure CIO Statutory Compliance. The contractor shall provide recommendations and supporting rationale for improvements and enhancements to the CPRP process. This shall include recommendations for policy, business rules, content, and procedures. The contractor shall conduct the analysis and evaluation of IT systems; to include technical review of CPRP-funded systems, in preparation for decision ready package reporting. The contractor shall, as directed by the Government, support all other day-to-day IT Investment Strategy & Management for the CPRP. The contractor shall prepare and submit all applicable documents and reports within five (5) business days of Government tasking to the COR. The contractor shall support the development, implementation, and execution of automated media to incorporate data into the appropriate storage format. Support shall include researching, planning, and developing various capital planning and investment-related processes and reports for assigned systems, programs, and initiatives. The contractor shall use functional expertise to develop key summary information for use by the multi-level investment review process for assigned systems. The contractor shall recommend an integration method for presenting key decision-making financial information for use by each level of the IT investment review process. The contractor shall provide the capability to create and execute data base retrievals from CRIS or other repositories as required to support the IT Investment management process.

The contractor shall ensure all policy direction and governance is in CIO Statutory Compliance. The contractor shall develop, review, integrate, and recommend IT Systems Policy and Guidance applicable to PFM processes. The contractor shall maintain liaison with Directorate and Transportation Component Commands' PFM and IT Investment Management points of contact. NDAA certification should include management through specific portfolio areas by acting as a conduit for paperwork required for the certification approval process. This will include: a) ensuring standardization of input; b) ensuring deadlines are met; c) initiating changes as appropriate; d) interpreting and disseminating policies and procedures associated with certification; e) assuring timely action of information requests; f) identifying problem areas; g) assuring quality of information in database and written submissions, and i) taking corrective actions as appropriate.

1.4.7.2 Task 7 Subtask 2: TWCF Investment. Support to TCJ6 CIO shall include (but is not limited to) researching, planning, and developing various capital planning and investment-related processes for IT to include data management support. The contractor shall be able to accommodate increases in workload in order to meet semi-annual tasks within the Corporate Portfolio Review Process (CPRP) cycle. The contractor shall document results of the CPRP to facilitate revisions prior to execution of the next CPRP cycle. The contractor shall assist with CPRP data tool training, workshops and meetings as required to support the Planning and Execution phases of the CPRP Review Cycle and prepare for CPRP board and council meetings. The contractor shall provide a written summary analysis of the results of the CPRP and Transportation Working Capital Fund (TWCF) IT investment analysis review to Government task manager within sixty (60) calendar days of tasking on an annual basis. The summary analysis report shall

cover the following areas: CRIS "history" snapshots, highlights of the IT POM review, and financial analysis trends. The contractor shall use functional expertise to identify and recommend key decision-making information for use by each level of the IT investment review process. The contractor shall review Budget Change Proposals (BCPs), OMB 300 Exhibit funding positions, other financial documents to include reprogramming actions and acquisition packages and provide other financial analysis support as required. The contractor shall provide direct CPRP cost analysis and management support to TCJ6.

The Government anticipates the effort required for this subtask will involve the following:

- Cost estimation and analysis
- TWCF rules, policies, and procedures
- DOD planning, programming, and budgetary practices and concepts
- Economic Analysis
- Functional Economic Analysis
- Functional Process Improvement
- Use of Microsoft Office
- Use of cost estimating tools such as; System Evaluation and Estimation of Resources – Software Estimating Model (SEER-SEM)
- Sensitivity/Risk Analysis
- IT Capital Planning & Investment
- Portfolio Management
- Earned Value Management
- Project Portfolio Management

The contractor shall provide oversight to all tables assigned by the Government and monitor the data for consistency and accuracy by working with analysts, data providers, data modelers, and other functional experts. The contractor shall provide technical support for data collection, import/export activities related to the CRIS, DOD Information Technology (IT) Portfolio Repository (DITPR) and USTRANSCOM CRIS IT Reporting (CRITR) Tool databases in support of CPRP analysis and integration processes and related CSV processes. The contractor shall accomplish import and export activities in accordance with established DOD standards and guidelines

1.4.8 Task Area 8: CIO Support (Optional Task)

The Government's intent is to exercise this optional task based on funding availability. The Government reserves the right not to exercise this optional task. The contractor shall perform systems compliance management and reporting. The contractor shall recommend policy, business rules, and procedures for IT compliance with the Clinger-Cohen Act, Federal Information Security Management Act (FISMA), Electronic Government (E-Gov) Act, Privacy Impact Assessment requirements, Electronic Authentication, PFM EA assessment, and interoperability. The contractor shall provide detailed analysis of command systems against these policies, and support the development and maintenance of USTRANSCOM CIO-related instructions, guidance, and handbooks as part of the CIO program. The contractor shall support DOD data requests, quarterly and annual reporting, audit requests, audit activities, and audit reporting in support of these compliance activities. The contractor shall synchronize IT compliance data fields in CRIS and DITPR as any system status changes, and ensure synchronization meets OSD and Joint Staff/J6 extraction dates seven or more times per year. The contractor shall identify requirements for IT compliance data fields in CRIS as policy changes, and provide support to implement and test those requirements. The contractor shall oversee all tables assigned by the Government and monitor the data for consistency and accuracy by working with analysts, data providers, data modelers, and other functional experts. The contractor shall provide technical support for data collection, import/export activities related to the CRIS, DITPR and CRITR databases in support of CIO analysis and

integration processes and related CSV processes. The contractor shall accomplish import and export activities in accordance with established DOD standards and guidelines. The contractor shall create reports and queries to monitor and enhance data quality and shall, as required, generate data administration tools and analysis reports to detect data errors and other anomalies.

The contractor shall support outreach activities as required with the Program Managers and Portfolio Managers to increase their knowledge so that they may provide more complete and accurate data. This will require scheduling and conducting meetings, responding to follow-up questions or solicitations for clarification, and developing documents and briefings to aid in their understanding. The contractor shall analyze and assist with the implementation of automated tools that the Government evaluates or uses to collect and report data in support of the PfM, and IT Investment Management process and/or strategic planning.

The contractor shall perform CIO video teleconference (VTC) management and support. The CIO and Components VTC is an O-7 led meeting on matters of CIO relevance to USTRANSCOM and its components. These meetings are held six to eight times per year. The contractor shall support the planning and execution of these meetings with the following activities: preparing, coordinating, organizing planning meetings and pre-briefs, and conducting all follow-up to prepare and coordinate minutes and action items. The contractor shall facilitate meetings, conduct the administration, and support as necessary to include the completion of agendas, meeting briefing packages, seating arrangements, minutes, action items, and other documentation and status reports as necessary. The contractor shall support the completion of action items and agenda topics by coordinating with points of contact, conducting data gathering and analysis, and reporting status as required.

1.4.9 Task Area 9: Strategic Planning and Reporting/Enterprise Transition Planning and Reporting

The contractor shall support the implementation of the DPfM strategy within the TCJ6 directorate to include assisting with the update of the goals, objectives, tasks, financial analysis, and metrics, as well as the reporting of metrics. The contractor shall also assist with DPfM strategic planning for the TCJ6 directorate, TCJ6-V Vice Director and the TCJ6-I division. The contractor shall provide DPfM analysis, strategic guidance and recommendations in support of the Corporate Services Vision, Corporate Governance, and the Distribution Steering Group.

The contractor shall support the Warfighter Mission Area (WMA) Enterprise Transition Plan (ETP) through coordination with TCJ5/4 and system/initiative Subject Matter Experts (SMEs). The contractor shall review and provide comments to the Office of the Secretary of Defense (OSD) in a timely manner on an as needed basis and complete the necessary staffing packages through the USTRANSCOM chain of command for approval and coordination. The contractor shall also provide support to the Business Mission Area (BMA) ETP by working with and coordinating all updates with TCJ5/4 to complete the semi-annual updates in March and September. The contractor shall be responsible for gathering enterprise level data for the BMA ETP from system/initiative SMEs, and work closely with the DOD Information Technology Portfolio Repository (DITPR) team to ensure the required DITPR data elements are updated with the correct information. The contractor shall provide BMA ETP milestone updates to the Business Transformation Agency (BTA) via the Progress Tracker web site on a monthly basis, within five (5) business days of the Government assigning the task, along with providing milestone updates to TCJ6 management for systems that are being certified along with the Investment Review Board/Defense Business System Management Committee (IRB/DBSMC) pre-briefs. The contractor shall assist the Distribution Portfolio Review Process (DPRP) team in gathering BMA and WMA ETP data in conjunction with system reviews on a monthly basis within five (5) business days of the Government

tasking. The contractor shall provide DPfM analysis and feedback to the BTA on draft and final products. The contractor shall ensure accuracy for USTRANSCOM submissions and evaluate component submissions related to and of interest to the DPO. The contractor shall also participate in all teleconferences and meetings to coordinate all BTA activities as required.

1.4.10 Task Area 10: Functional Area Communications and Computer Systems Manager (FACCSM) Support (Optional Task)

The Government's intent is to exercise this optional task based on funding availability. The Government reserves the right not to exercise this optional task. The contractor shall complete the necessary Functional Area Communications and Computer Systems Manager (FACCSM) training required by the USTRANSCOM Network Office and perform FACCSM duties in support of this contract IAW USTRANSCOM Instruction 33-16, paragraphs 4.5, 5.1, 6, 7, and 8. FACCSM duties will also include VTC and teleconference support.

1.4.11 Task Area 11: Technical Assessment (TA)

The contractor shall support TCJ6 and the USTRANSCOM CPRP and TA process. This includes collecting and evaluating data for systems identified by TCJ6 from the applicable system program managers. The TA data shall be entered/updated in the CRIS database prior to the CPRP. The contractor shall prepare an annual report by 30 September which documents actions completed to support the TA/CPRP and CSV and update CRIS data as required. The contractor shall document results of the CPRP to facilitate revisions prior to execution of next CPRP cycle. The contractor shall assist in implementing new procedures using the CRIS database.

1.4.12 Task Area 12: Strategic, Functional, and Operational Plans and Policy Support

The contractor shall review and become familiar with the current organizational and management structure and management control review processes of USTRANSCOM, Joint Staff, Joint Forces Command (JFCOM) and DOD in order to provide technical support for direct near- and long-term strategic operations, and functional planning to TCJ6. The contractor shall assist Government personnel with the functional management of collaborative/web based analysis tools i.e. Defense Collaboration Tool Suite (DCTS), Sametime. The contractor shall provide development, integration, and interoperability of USTRANSCOM processes with USTRANSCOM architectures, systems, and the Joint community. The contractor shall assist and provide functional expertise to Government personnel in the IT Investment and Policy arena with functional program management of plans, policy, and programs. The contractor shall provide technical support, analysis and services to initiate and improve USTRANSCOM functional and cross-functional distribution capabilities, portfolio management joint capability areas and directed efforts. The contractor shall provide requirements analysis, planning, and integrations of USTRANSCOM and DOD Strategic Operational and Functional management boards, forums, concepts, plans, and policies which provide the foundation and impetus for transformation, and change and enhance the support to the warfighter into the 21st century.

The contractor shall assist the IT Investment and Policy effort in defining future strategies to satisfy command strategic and tactical requirements. Emphasis should be on functional strategy, user requirements, budget, and technical constraints. This will entail developing, creating, writing, or reviewing plans and policies, reports, briefings, and trip reports.

1.4.13 Task Area 13: Groupware Workshop Support

1.4.13.1 Task 13 Subtask 1: DPO Support. The contractor shall provide Group Systems software and technical support to USTRANSCOM, process owners, and organizations designated by the Government for use of the facility for the support of DPfM and DPO related efforts to include DSG meetings and DPfM capabilities based assessment team forums. The contractor shall provide support for workshops using mobile Group Systems suite to include setup/breakdown of all equipment (Local Area Network, laptops, audiovisual), planning, and technographer support at the designated location. The contractor shall manage the use of the Groupware facilities in coordination with the Government to include the publishing and maintenance of a schedule of Groupware Facility and Mobile suite activities within five (5) business days of task order start date and continuously thereafter. The contractor shall provide professional facilitation for workshops conducted with groupware assets.

1.4.13.2 Task 13 Subtask 2: TWCF Support. The contractor shall provide Group Systems software and technical support to USTRANSCOM, Defense Information Systems Agency (DISA), process owners, and organizations designated by the Government for use of the facility in support of non-DPO related activities on an as available basis. The contractor shall provide support for workshops using mobile Group Systems suite to include setup/breakdown of all equipment (Local Area Network, laptops, audiovisual), planning, and technographer support at the designated location. The contractor shall provide professional facilitation for workshops conducted with groupware assets.

2. DELIVERABLES

The contractor shall provide all deliverables electronically in Microsoft Office (Word, Excel, PowerPoint, Project, etc.) formats pursuant to the following schedule.

PWS Para	Deliverable Title	Schedule
1.4.1.1	Task Order Management Plan	Draft – within fifteen business days of task order start date. Final – within five business days of Government comment.
1.4.1.2	Monthly Status Reports	No later than the 5th business day of each month.
1.4.1.3	IPR Presentation Materials	Five business days prior to the IPR
1.4.1.3	IPR Minutes	Within five business days after IPR as requested by the COR
1.4.1.4	Trip Reports	Within five business days after completion of travel
1.4.1.5	Employment Status Report	Initial – Within thirty calendar days after task order start date Subsequent – Within five business days of any changes in personnel
1.4.1.6	Weekly Activity Reports	By close of business each Wednesday
1.4.2	DTS PFM Handbook, Training Guide Updates, and Trifolds	Within thirty calendar days of Government tasking on an annual basis
1.4.2.1 (Optional)	Document Operational Assessment methodology	Within forty-five calendar days of Government tasking on an annual basis

1.4.3	Analysis Plan to support Task 3	Draft – within thirty calendar days of task order start date Final – within fifteen business days of Government comments
1.4.3.1	Populate BTA Portal and maintain data quality	Within ten business days of IRB/DBMSC monthly meetings
1.4.4.1	Provide Business Case Analysis	Within ninety calendar days of focus area establishment
1.4.4.3	Oversight Plan	Within fifteen business days of Government direction
1.4.5	Provide reports and recommendations for management of ERRC Working Group meeting	Weekly, twenty-four hours prior to ERRC meetings
1.4.5	Enterprise Requirement Solution Analysis	Within fifteen to thirty business days as determined by Government dependent upon complexity of requirement
1.4.6	CSV Governance Instruction Updates	Monthly, 10th business day of each month
1.4.6	Governance Conceptual and Prescriptive Reference Model Review	Annually, by 1 October
1.4.7.1	IT Investment Strategy Oversight and Policy documentation	Within five business days after receiving the task from the Government
1.4.7.2	Written summary analysis of the results of the CPRP and TWCF IT investment analysis review.	Within sixty calendar days of Government tasking on an annual basis.
1.4.9	Provide BMA ETP milestone semi-annual updates	Semi-annually, March and September
1.4.9	Provide BMA ETP milestone monthly updates	Monthly, within five business days of the Government assigning the task
1.4.9	Status updates from systems/initiatives for BTA ETP development	Monthly, within five business days of the Government tasking
1.4.11	Technical Assessment Report	Annually, by 30 September
1.4.13	Develop and maintain Groupware Facility and Mobile Suite availability calendar to include schedule of use for both capabilities	Within five business days of task order start date and updates as needed thereafter

3. SERVICE DELIVERY SUMMARY

In order to measure contractor performance for the tasks and deliverables associated with this PWS, the contractor shall meet or exceed the operational objectives and performance or availability measurements in the Service Delivery Summary below.

PWS Para	Performance Objective	Performance Threshold
1.4.1.2	Monthly Status Reports	95% of the time Monthly Status Report is received no later than the 5th business days of each month
1.4.1.3	IPR Presentation Materials	95% of the time IPR Presentation Materials are received five business days prior to the IPR
1.4.1.3	IPR Minutes	95% of the time IPR Minutes are received five business days after IPR
1.4.1.4	Trip Reports	95% of the time Trip Reports are received within five business days after completion of travel
1.4.1.5	Employment Status Report	95% of the time Employment Status Report is received within five business days of any changes in personnel
1.4.1.6	Weekly Activity Reports	95% of the time Weekly Activity Reports are received by close of business each Wednesday
1.4.2.	DTS PFM Handbook, Training Guide Updates and Trifolds	95% of the time updates are received within thirty calendar days of tasking
1.4.2.1 (Optional)	Document Operational Assessment methodology	95% of the time methodology is received and updated within forty-five calendar days of tasking
1.4.3.1	Populate BTA Portal and maintain data quality	98% of the time BTA Portal is populated within ten business days of IRB/DBSMC monthly meetings
1.4.4.1	Provide Business Case Analysis	95% of the time Business Case Analysis is provided within ninety calendar days of focus area establishment
1.4.4.3	Oversight Plan	95% of the time Oversight Plan is developed within fifteen business days of Government direction
1.4.5	Provide reports and recommendations for management of ERRC Working Group Meeting	95% of the time, reports are provided twenty-four hours prior to ERRC Working Group weekly meeting
1.4.6	CSV Governance Instruction Updates	95% of the time update received by the 10th business day of the month
1.4.9	Provide BMA ETP milestone monthly updates	95% of the time updates provided within five business days of Government assigning the task
1.4.9	Status updates from systems/initiatives for BTA ETP development	95% of the time status updates provided within five business days of Government tasking

4. GOVERNMENT WORKSTATIONS AND EQUIPMENT

The Government shall provide an office environment and the following resources to the contractor for performance of this task order:

The Government shall provide workspace at a Government facility for the contractor up to 60 employees in support of this requirement. The Government shall provide all standard normal office equipment (office work area, telephone, computer, software, base network access, etc.) for official use only during task order performance.

The use of other contractor-requested Government office space, etc, shall be evaluated on an "as needed" basis, and USTRANSCOM shall grant approval for use if it does not conflict with mission requirements as mutually agreed upon. The Government shall furnish appropriate user identification cards and passwords for shared resources. Multiple sources of data are required throughout the terms of this PWS and shall be provide by the Government in a timely manner.

5. GENERAL INFORMATION

5.1 Place of Performance

Services will be performed both on-site in Building 1961 and the Groupware facility in Building 1700, Scott AFB, IL, and at the Government offsite location, 1734 Corporate Crossing, O'Fallon, IL, during normal duty hours, 0730-1600, Monday-Friday, excluding Government holidays, and at the contractor's off-site facility. Hours are subject to change due to increased requirements for operations outside the normal workday.

5.2 Period of Performance

Period of Performance for the Base Year is 1 January 2009 through 30 September 2009.

Period of Performance for the First Option Year is 1 October 2009 through 30 September 2010.

Period of Performance for the Second Option Year is 1 October 2010 through 30 September 2011.

Period of Performance for the Third Option Year is 1 October 2011 through 30 September 2012.

Period of Performance for the Fourth Option Year is 1 October 2012 through 14 June 2013.

5.3 Travel.

Performance under this task order may require contractor travel within and outside the Continental United States. The Government will reimburse the contractor for travel expenses subject to Federal Acquisition Regulation and Joint Travel Regulation. All contractor travel shall be coordinated with and approved by the primary or alternate Contracting Officer representative (COR) prior to incurring any travel expenses. The contractor shall identify personnel who will be traveling in sufficient time to obtain the lowest possible rates for airfare, rental car and lodging. For long distance travel, a minimum of five (5) business days advance notice from the travel commencement date is required. The travel request shall be in writing and contain the dates, location, and estimated travel costs. Contractor invoices (along with associated receipts) shall support all travel reimbursement requests. Actual travel costs will be reported to the Contractor Officer's Representative by person, by trip within five (5) business days of completion of travel. The Government will not reimburse local travel and related expenses to the contractor for daily travel to or from work at 1734 Corporate Crossing, O'Fallon, IL 62269 or Scott AFB.

5.4 Security Requirements. The contractor shall establish, document, and execute procedures to comply with contractor requirements cited in DOD 5220.22-M. The contractor shall acquire all necessary installation passes for contractor personnel. Contractors operating on Government installations shall ensure their personnel always wear a contractor-furnished identification badge and provided USTRANSCOM Security Badges on their outer clothing, on the front of the body, between the neck and the waist, and it shall be visible at all times.

5.5 Notification of Installation Security. The contractor shall notify local security personnel of contract start at each installation IAW USTRANSCOM FAR Sup 5552.204-9000, Notification of Government Security Activity and Visitor Group Security Agreements. At a minimum, the security agreement shall address the following topics:

- Visitor/Vehicle Pass
- Required Background Check as required
- Restricted Area Badges, AF Form 1199, as required
- Designated Government security manager
- Issue and turn in
- Control and accountability
- Inventories
- Associated training
- Escorts
- Pre-announcement Procedures

5.6 Security Regulation Compliance. The contractor is required to comply with all security regulations and directives as identified herein and other security requirements in this contract. The contractor shall comply with DD Form 254, Contract Security Classification Specification.

5.7 Physical Security. The Contractor shall safeguard all Government owned equipment and materials in the Contractor's possession or used in the day-to-day performance of the contract. The Government will not be held accountable/responsible for any contractor items that may have been lost or stolen. Responsibility for the contractor's compliance with internal security at the site shall be assigned to the contractor. All contractor personnel shall be briefed on site security operating procedures prior to or upon commencement of contract award and shall be debriefed upon termination. The contractor shall be responsible for all continuing security training of their personnel, their subcontractors, and associate contractor personnel.

5.8 Personnel Security Clearances. All contractor personnel shall possess SECRET Security Clearances. All on-site contractor personnel shall be required to have access to SECRET information or data within a Government-controlled space at the start of the task order. The contractor shall ensure that sufficient personnel on duty have the appropriate security clearance to accomplish all services specified in this PWS. The Government will provide the contractor access to applicable Government facilities from the commencement of the contract until completion. All contractor and subcontractor personnel not possessing the proper clearances and requiring entry to restricted areas shall be continuously escorted. Designated contractor personnel who have been granted the appropriate security clearance and escort privileges shall provide this escort. The contractor shall ensure that adequate contractor personnel have been qualified as escorts so that performance of the requirements under this PWS is not delayed.

5.9 Inspection and Acceptance Criteria. All work performed under this PWS, and all deliverables provided under this PWS are subject to inspection and acceptance by the Government. The Government will usually require up to ten (10) business days from receipt of all deliverables for review and comment/acceptance. Acceptance will be based upon the deliverables meeting contract requirements and accepted professional standards for technical content, workmanship and relevance to stated functional business process requirements. If no guidance is received from the Government by the end of the ten day period, the contractor shall contact the COR for direction. Any guidance from the Government for improvement/revisions to deliverables will be provided in writing.

5.10 Packaging, Packing and Shipping Instructions. The contractor shall provide all deliverables and other project related products, reports, etc., as an electronic file e-mail attachment whenever possible. The contractor shall generate all document deliverables in standard office automation software products. If the contractor determines that it would be more beneficial to use non-standard office automation software to generate any of the required deliverables, the contractor must notify and receive approval from the COR prior to generation of those deliverables. In the event deliverables can not be delivered via e-mail they shall be hand delivered on Compact Disk (CD). Multiple deliverables may be combined on a CD.

5.11 Quality Assurance. The contractor shall support Government agency reviews and audits of all services and support provided under this PWS. The contractor shall be prepared to support Quality Assurance reviews conducted by the Government. The Government reserves the right to authorize an independent verification and validation of the contractor's procedures, methods, data, equipment, and other services provided at any time during the performance of this PWS.

5.12 Additional Information

Nondisclosure Agreement for Contractor Employees. Due to the sensitive nature of the data and information being worked with on a daily basis, completion of non-disclosure statements will be required by contractor personnel to ensure information that is considered sensitive or proprietary is not compromised. All contractor personnel will be required to sign a non-disclosure agreement. The Government will retain these documents. See Appendix 4.

6. Contractor Transition

6.1 Exit Requirements. If this contract is terminated for any reason by the Government or if an option year is not exercised, the contractor shall be given a sixty (60) business day transition period. The contractor shall organize all work related documents and files, store them on the designated shared drives, and provide a file plan outlining the file structure. Status for each project will be documented, to include recent, current, and pending actions. The contractor shall provide a listing of all GFE and COTS utilized in support of this task order and soft copies of all procedures and training materials developed as part of this task order. In addition, the contractor shall provide a complete list of all badges, vehicle passes, and Government software access permissions by individual currently working on the task order. The contractor must ensure no logistics or contract data is corrupted, changed, or altered in a manner that would cause damage to the Government.

6.2 Ramp Up Time. The contractor shall have at least 25 percent (25%) of all necessary personnel and the capability to support each task from task order start. The contractor shall have 50 percent (50%) of personnel available fifteen (15) calendar days after task order start date. The contractor shall ensure that personnel start dates do not impair performance to meet all deliverables.

Appendix 1

HISTORICAL WORKLOAD*

Task Area 1, Contract-Level and Task Order Management: 3,840 hrs
 Task Area 2, Defense Transportation System (DTS) Wide Portfolio Management Support: 3,840 hrs
 Task 2 Subtask 1, Operational Assessment (Optional): 960 hrs
 Task Area 3, DOD-Wide Distribution Portfolio Management Support: 13,440 hrs
 Task 3 Subtask 1, IRB and DBSMC Support: 5,760 hrs
 Task 3 Subtask 2, Distribution Portfolio Management Functional Advisory: 1,920 hrs
 Task 3 Subtask 3, Distribution Portfolio Management Technical Advisory: 1,920 hrs
 Task Area 4, DOD-Wide Distribution Portfolio Management Focus Area Analysis Support
 Task 4 Subtask 1, DPfM BCA Development: 9,600 hrs
 Task 4 Subtask 2, Additional DPfM BCA Support (Optional): 7,680 hrs
 Task 4 Subtask 3, Implementation Support: 15,360 hrs
 Task 4, Subtask 4, Additional Implementation Support (Optional): 5,760 hrs
 Task Area 5, Enterprise Requirements Management Process Support: 15,936 hrs
 Task Area 6, CSV Governance Support: 2,880 hrs
 Task Area 7, Corporate Portfolio Review Process (CPRP)
 Task 7 Subtask 1, CPRP: 960 hrs
 Task 7 Subtask 2, TWCF Investments: 5,160 hrs
 Task Area 8, CIO Support (Optional): 4,608 hrs
 Task Area 9, Strategic Planning and Reporting/Enterprise Transition Planning and Reporting: 7,680 hrs
 Task Area 10, Functional Area Communications and Computer Systems Manager Support (Optional): 192 hrs
 Task Area 11, Technical Assessment: 384 hrs
 Task Area 12, Strategic, Functional, and Operational Plans and Policy Support: 3,840 hrs
 Task Area 13, Groupware Workshop Support:
 Task Area 13, Subtask 1: DPO Support: 3,264 hrs
 Task Area 13, Subtask 2: TWCF Support: 576 hrs

*The Historical Workload is based on the current contract and is for the duration of one Fiscal Year. Actual workload may vary depending on the requirements of USTRANSCOM and other Government entities.

Appendix 2

ACRONYMS

Acronym	Definition
AIS	Automated Information System
AMC	Air Mobility Command
BCA	Business Case Analysis
BMA	Business Mission Area
BTA	Business Transformation Agency
CCA	Clinger-Cohen Act
CIO	Chief Information Officer
COP D2	Common Operational Picture Deployment and Distribution
CPRP	Corporate Portfolio Review Process
CRIS	Corporate Resource Information Source
CRITR	CRIS IT Reporting
CSV	Corporate Services Vision
DBSMC	Defense Business System Management Committee
DCTS	Defense Collaboration Tool Suite
DDS	Defense Distribution System
DITPR	DOD Information Technology Portfolio Repository
DISA	Defense Information Systems Agency
DOD	Department of Defense
DPfM	Distribution Portfolio Management
DPO	Distribution Process Owner
DPRP	Distribution Portfolio Review Process
DSG	Distribution Steering Group
DTS	Defense Transportation System
EA	Enterprise Architecture
E-Gov	Electronic Government
ERM	Enterprise Requirements Management
ERRC	Enterprise Requirements Review Council
ESE	Enterprise Systems Engineering
ETP	Enterprise Transition Plan
FACCSM	Functional Area Communications and Computer Systems Manager
FISMA	Federal Information Security Management Act
IPR	In Progress Review
IRB	Investment Review Board
IT	Information Technology
JCIDS	Joint Capabilities Integration and Development System
JDDE	Joint Deployment and Distribution Enterprise
JFCOM	Joint Forces Command
MSC	Military Sealift Command
MSR	Monthly Status Report

NDA	National Defense Authorization Act
OA	Operational Assessment
OMB	Office of Management and Budget
OSD (AT&L)	Office of the Secretary of Defense for Acquisition Training & Logistics
PfM	Portfolio Management
PM	Program Manager
SCOR	Supply Chain Operational Reference
SDDC	Surface Deployment and Distribution Command
SEER-SEM	System Evaluation and Estimation of Resources – Software Estimating Model
SME	Subject Matter Expert
SSRB	Source System Review Board
TA	Technical Assessment
TCC	Transportation Component Command
TCJ6	Command, Control, Communications and Computer Systems Directorate
TWCF	Transportation Working Capital Fund
USTRANSCOM	United States Transportation Command
VTC	Video-conference
WMA	Warfighter Mission Area

Appendix 3

APPLICABLE DOCUMENTS

Federal and DOD Regulations

Clinger-Cohen Act (CCA) of 1996

<http://www.defenselink.mil/cio-nii/cio/cca.shtml>

DOD Directive 8000.1, Management of DoD Information Resources and Information Technology

<http://biotech.law.lsu.edu/blaw/dodd/corres/html2/d80001x.htm>

DOD Instruction 5158.06, Distribution Process Owner

<http://www.js.mil/whs/directives/corres/ins1.html>

DOD Instruction 8115.01, Information Technology Portfolio Management

<http://www.js.mil/whs/directives/corres/ins1.html>

DOD Instruction 8115.02, Information Technology Portfolio Management Implementation

<http://www.js.mil/whs/directives/corres/ins1.html>

E-Government Act of 2002 (Public Law 107-347)

http://en.wikipedia.org/wiki/E-Government_Act_of_2002

Federal Acquisition Reform Act (Division D of Public Law 104-106)

www.cio.noaa.gov/Policy_Programs/fara.pdf

Federal Information Security Management Act (FISMA) of 2002

http://en.wikipedia.org/wiki/Federal_Information_Security_Management_Act_of_2002

Information Technology Management Reform Act (Division E of Public Law 104-106)

Paperwork Reduction Act (Public Law 104-13, Chapter 35 of title 44, United States Code)

<http://www.archives.gov/federal-register/laws/paperwork-reduction/3501.html>

USTRANSCOM Instructions

USTRANSCOM Instruction 33-16

<https://portal.transcom.mil/>

USTRANSCOM FAR Supplement 5552.204-9000, Notification of Government Security Activity and Visitor Group Security Agreements

<http://farsite.hill.af.mil/vfustca.htm>

Appendix 4**NON-DISCLOSURE AGREEMENT FOR CONTRACTOR EMPLOYEES ON USTRANSCOM CONTRACTS**

NOTE: This Non-Disclosure Agreement is a standard agreement designed for use by contractor (including subcontractor) employees assigned to work on USTRANSCOM contracts. Its use is designed to protect non-public government information from disclosure and prevent violations of federal statutes/regulations. The restrictions contained in this agreement also serve contractors by promoting compliant behavior that keeps contractors eligible to compete for government contracts. In addition to the potential impact on future business opportunities, failure to abide by this agreement could result in administrative, civil or criminal penalties specified by statute or regulation.

1. I, _____, currently an employee of _____, hereby agree to the terms and conditions set forth below:

2. I understand that I will have access to confidential business information (as defined by 18 USC 1905), contractor bid or proposal information (as defined by FAR 3.104-3), and/or source selection sensitive information (as defined by FAR 3.104-3) either for contract performance or as a result of working in a USTRANSCOM facility or of working near USTRANSCOM personnel, contractors, visitors, etc. I fully understand that such information is sensitive and must be protected in accordance with 41 U.S. Code Section 423 and 18 U.S. Code Section 1905 and FAR Part 3. I also certify that I do not have any real or apparent conflicts of interest with respect to the information disclosed. If any potential conflicts of interest, real or otherwise, do present themselves, then I shall immediately disclose the pertinent information that may be a potential conflict to an agency ethics official who shall review the circumstances.

3. In the course of performing under contract/order # _____ or some other contract or subcontract for the USTRANSCOM, I agree to:

a) Use only for Government purpose any and all confidential business information, contractor bid or proposal information, and/or source selection sensitive information to which I am given access. I agree not to disclose "non-public information" by any means (in whole or in part, alone or in combination with other information, directly or indirectly or derivatively) to any person except to a U.S. Government official with a need to know or to a non-Government person (including, but not limited to, a person in my company, affiliated companies, subcontractors, etc.) who has a need to know related to the immediate contract/order, has executed a valid form of this non-disclosure agreement, and receives prior clearance by the contracting officer. All distribution of the documents will be controlled with the concurrence of the contracting officer.

b) "Non-public information", as used herein, includes trade secrets, confidential or proprietary business information (as defined for government employees in 18 USC 1905); advance procurement information (future requirements, acquisition strategies, statements of work, budget/program/planning data, etc.); source selection information (proposal rankings, source selection plans, contractor bid or proposal information); information protected by the Privacy Act (social security numbers, home addresses, etc.); sensitive information protected from release under the Freedom of Information Act (pre-decisional deliberations, litigation materials, privileged material, etc.); and information that has not been released to the general public and has not been authorized for such release (as defined for government employees in 5 CFR 2635.703).

c) Not to use such information for any non-governmental purposes, including, but not limited to, the preparation of bids or proposals, or the development or execution of other business or commercial ventures.

d) To store the information in such a manner as to prevent inadvertent disclosure or releases to individuals who have not been authorized access to it.

4. I understand that I must never make an unauthorized disclosure or use of confidential business information, contractor bid or proposal information, and/or source selection sensitive information unless:

a) The information has otherwise been made available without restriction to the government, to a competing contractor, or to the public;

b) The contracting officer determines that such information is not subject to protection from release.

5. I agree that I shall not seek access to "non-public information" beyond what is required for the performance of the services I am contracted to perform. I agree that when I seek access to such information or attend meetings or communicate with other parties about such information, I will identify myself as a contractor. Should I become aware of any improper or unintentional release or disclosure of "non-public information", I will immediately report it to the contracting officer in writing. I agree that I will return all forms (including copies or reproduction of original documents) of any "non-public information" provided to me by the government for use in performing my duties to the control of the Government when my duties no longer require this information.

By signing below, I certify that I have read and understand the terms of this Non-Disclosure Agreement and voluntarily agree to be bound by its terms.

Signature of Employee

Date

Printed Employee Name

Government COR

Date

Contracting Officer

Date