



WASHINGTON METROPOLITAN AREA TRANSIT AUTHORITY  
600 Fifth Street, NW, Washington, DC 20001-2651

**AMENDMENT OF SOLICITATION / MODIFICATION OF CONTRACT**

1. AMENDMENT/MODIFICATION Amendment No. 001		2. EFFECTIVE DATE (Same as block 17)	
3. ISSUED BY PURCHASING SECTION <b>Office of Procurement and Materials Bridgette Crowell- (202) 962-2718</b>		4. ADMINISTERED BY (If other than block 3)	
5. CONTRACTOR NAME AND ADDRESS  (Street, city, county, state, and Zip Code)		6. FORM TYPE (Check only one) <input checked="" type="checkbox"/> Amendment Of Solicitation No. <b>CQ18047</b> Date <b>10/17/17</b> (See block 7)  <input type="checkbox"/> MODIFICATION OF CONTRACT NO. Date _____ (See block 9)	
7. <input checked="" type="checkbox"/> THIS BLOCK APPLIES ONLY TO AMENDMENTS OF SOLICITATIONS The above numbered solicitation is amended as set forth in block 10. The hour and date specified for receipt of Offers <input type="checkbox"/> extended, <input checked="" type="checkbox"/> is not extended. Offerors 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 signing and returning _____ copies of this 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 ISSUING OFFICE 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 such telegram makes reference to the solicitation and this amendment, and is received prior to the opening hour and date specified.			
8. ACCOUNTING AND APPROPRIATION DATA (If required)			
9. THIS BLOCK APPLIES ONLY TO MODIFICATIONS OF CONTRACTS/ORDERS <input type="checkbox"/> This Change Order is issued pursuant to _____ The Changes set forth in block 10 are made to the above numbered contract/order. <input type="checkbox"/> The above numbered contract/order is modified to reflect the administrative changes (such as changes in paying office, appropriation data, etc.) set forth in block 10. <input type="checkbox"/> Supplemental Agreement is entered into pursuant to authority of It modifies the above numbered contract as set forth in block 10.			
10. DESCRIPTION OF AMENDMENT/MODIFICATION  ATTACHMENT 1- Amended Date Changes ATTACHMENT 2-Revised Scope of Work ATTACHMENT 3-Revised Price Schedule  Except as provided herein, all terms and conditions of the document referenced in block 6, as heretofore changed, remain unchanged and in full force and effect.			
11. <input type="checkbox"/> CONTRACTOR/OFFEROR IS REQUIRED TO SIGN THIS MODIFICATION AND RETURN _____ COPIES TO ISSUING OFFICE.		<input type="checkbox"/> CONTRACTOR/OFFEROR IS NOT REQUIRED TO SIGN THIS DOCUMENT	
12. NAME OF CONTRACTOR/OFFICE  BY _____ (Signature of person authorized to sign)		15. WASHINGTON METROPOLITAN AREA TRANSIT AUTHORITY  BY <u>Monique Anderson</u> (Signature of Contracting Officer)	
13. NAME AND TITLE OF SIGNER (Type or print)	14. DATE SIGNED	16. NAME OF CONTRACTING OFFICER (Type or print) <b>Monique A. Anderson</b>	17. DATE SIGNED <b>10/17/17</b>

## **ATTACHMENT 1**

- Scope of Work is hereby replaced with attachment 2
- Question extend due October 25, 2017
- Proposal Due Date November 17, 2017 @ 2:00pm
- Contract # CQ18047 is added
- Evaluation criteria is here by replaced with the following
  1. Technical Approach
  2. Contractor's Past Performance
  3. Transition Approach
  4. Bench Strength
- Price Schedule is hereby replaced with attachment 3
- Proposers should be aware that overall technical merit are of extreme most importance to the Authority in this Solicitation.
- Pre-solicitation conference

October 20<sup>th</sup>, 2017 @ 2:30pm -3:30pm  
Washington Metropolitan Area Transit Authority  
JGB-Board Room lobby  
600 5th Street, NW  
Washington, DC 20001

## ATTACHMENT 2

### SCOPE OF WORK

#### 1. Introduction

The office of Data Center and Infrastructure (DCI) of the Department of Information Technology (IT), is responsible for providing core IT services to all organizations within WMATA. A single point of contact (SPOC) for reporting, escalating and resolving issues related to IT services and endpoint hardware for WMATA's internal workforce is provided through IT Customer Support (ITCS) function within IT/DCI. Metro's Enterprise Monitoring Center (MEMC) is responsible for enterprise-wide infrastructure monitoring, reporting and management of critical incidents. Through this statement of work (SOW), WMATA is seeking a qualified contractor to provide services rendered under ITCS and MEMC detailed within this SOW.

This Scope of Work is issued by WMATA on behalf of Data Center and Infrastructure (DCI) Department, hereinafter referred to as "Authorized POC". The term contractor, contractor and supplier will be used synonymously to refer to the entity responsible for providing services to WMATA.

#### 2. Background and Current Environment

WMATA's internal workforce, which consists of employees and contractors is spread throughout the national capital region (NCR). The IT services used by the workforce may vary depending upon the job functions. Due to constantly changing environment and supported user-base, the background information provided in this section is provided for reference purposes:

##### 2.1 Endpoint Environment

The endpoint environment consists of a variety of hardware and software. The information provided below represents most common elements in the environment and is not an all-inclusive list.

- **Hardware:** The endpoint hardware includes but not limited to: Desktops, Laptops, Tablets, Mobile Phones, Printers, Scanners, Fax Machines, TVs and Display units of varying sizes. The primary endpoint computing hardware consists of 7000+ Desktops and Laptops, manufactured by Dell. Desktop Operating Systems (OS): Microsoft Windows OS versions 7, 8.1 and 10. There are also some legacy versions Microsoft OS which may be decommissioned at a future date.
- **Office Productivity Applications and Cloud-based Services:**
  - Microsoft Office Suite (Outlook, Word, PowerPoint, Excel). The versions include (Office 2013 volume licensed, Office 2013 Pro Plus and Office Pro Plus 2016). There are also legacy versions of Office 2010, which may be decommissioned at a future date.
  - Microsoft Visio and Project
  - Office 365-based Email, Skype for Business and OneDrive Service
  - Adobe Professional (multiple versions) and Adobe Reader
- **Primary Desktop Authentication Environment:** Microsoft Active Directory. Oracle Identity Manager is used for providing Single Sign-on (SSO) for certain applications.
- **Desktop Management:** Microsoft SCCM
- **Browser Environment:** Internet Explorer (IE) 9, 10, 11 and Edge. Other unsupported browsers may exist in the environment.

- Other commonly used applications: Microsoft SharePoint, PeopleSoft HCM, ELM, FIN, CRM, and EPM, IBM Maximo

## 2.2 Tools used by ITCS Team

Following is the list of tools generally used for delivery of end-user support services by IT's customer support team:

- CA Service Desk for Ticketing
- CA Suite of Enterprise Monitoring Products (CA Spectrum, Service Desk, SOI, APM, CMDB)
- Maximo
- Microsoft Office Suite, Visio and Project
- PeopleSoft HCM, ELM, FIN, CRM, and EPM
- Internet Explorer
- Quest ARS
- NICE call recording software
- IT Customer Support Knowledge Base (Wiki)
- Softphone ActiveX
- Avaya Call Management System (CMS)
- Confluence/WiKi knowledgebase
- Enterprise Chat (Bomgar)

## 2.3 Current Call and Tickets Volume and Metrics

The estimated volume of Service Desk incidents and requests is an average of 10,000 calls per month. These are merely estimates, and regardless of an increase in call volume, the Contractor is expected to adjust staffing and resources to meet the SLAs and achieve all deliverables. In the event the call volume increases by 10% over a continuous three-month period, then WMATA will hear a request for an equitable adjustment. The Contractor must inform WMATA as part of its proposal what it intends to do if monthly opened ticket volume deviates from 10,000.

Group	Metric	Definition
Tier I and II	Call Response Time	90% of all calls are answered within 30 seconds
Tier I	Email Response Times	90% of all incoming email is responded to within 15 minutes
Tier I and II	First Call Resolution	75% / 85% of all incoming customer requests are resolved on the initial interaction
Tier I	Abandonment Rate	Less than 10% of total call volume is abandoned
Tier I	After Call Work	Average After Call Work is less than 1.5 minutes
Tier I	Occupancy	Technicians must spend 85% of the work day actively working on customer interactions as indicated by phone login status
Tier I and II	Ticket Resolution	95% of all incoming customer requests are resolved based on the pre-determined issue categorization

## 2.4 Current Staffing Level of Customer Support

The following staffing levels are provided for reference purposes and are subject to changes.

- Tier I – 12 (spread across multiple shifts)
- Tier II – 12 (spread across multiple shifts)
- Technical Leads (Tier III) – 2
- Break-Fix – 2
- Imaging Technician – 1
- Process/Knowledgebase Support Analyst – 1

For disaster recovery purposes, WMATA uses two separate data centers: Primary Site - Jackson Graham Building (JGB) at 600 5<sup>th</sup> Street NW, Washington, DC 20001 and the Secondary Site - Carmen Turner Facility (CTF) at the 3500 Pennsy Drive, Hyattsville, Maryland 20785. Core Tier I and Tier II staff are housed at JGB with a limited number of Tier II resources in other locations within the organization.

## 3. Scope and Understanding of the Requirements

The services performed under this SOW span multiple IT support areas and cover all WMATA's facilities, currently operated within the NCR (**National Capital Region**).

The qualified contractor must have performed customer support services, similar in size, complexity and scope as specified in this SOW as the prime contractor for private business, local, state and/or federal entities within past 3 years.

The qualified contractor must have supported organizational Continuity of Operations (COOP), Disaster Recovery and Asset Security in the past 3 years for the services within the scope of this SOW.

The contractor will be responsible for providing limited hardware logistic services for deployment/recovery of the hardware. The contractor will also be responsible for providing support during planned and unplanned special events, such as 4<sup>th</sup> July and snow emergencies, involving activation of WMATA's emergency command centers. All surge requirements shall be approved by the COTR.

## 4. Contract Products and Services to Support the Requirements

As a single point of contact, the IT Customer Support Center provides Automatic Call Distribution (ACD), Email, Chat, Fax and walk-up support for receiving, tracking, resolving and reporting of IT Customer support trouble tickets and service requests for all WMATA-supported environments.

The contractor shall provide services in multiple support areas within the scope of ITCS. The areas include but not limited to:

- Provide Tier I support for fielding, logging, resolving and escalating all IT-related issues and incidents
- Provide Tier II support for advanced software and hardware troubleshooting and Critical Event Monitoring
- Provide inbound call support via the designated WMATA-provided ACD
- Utilize and submitting support content in the WMATA-provided knowledgebase
- Respond to support requests received through Email, Chat, Fax, Phone and Walk-ins
- Respond to general end-user inquires
- Coordination with WMATA's management, support customer-outreach with roadshows
- Hardware Break-Fix
- Hardware and Software refresh

- Desktop and Laptop Imaging
- Support Local and Enterprise Printing
- Support of WMATA's endpoint hardware refresh and enterprise-wide software rollouts
- ITCS Knowledgebase Management
- Coordinate with WMATA's IT, non-IT stakeholders and other teams as required for delivery of services
- Support WMATA's Asset Management efforts for the assets within the scope of this contract (e.g., Desktops, Laptops, Tablets, Monitors)
- Provide insured logistics support required during delivery, recovery and configuration of equipment at the remote sites.
- Provide Services during COOP and DR execution
- Provide "How-to" and Level 2 assistance for WMATA-defined Commercial Off-the-Shelf (COTS) applications included in the WMATA Service Catalogue.
- Track and report IT Customer Support performance on a daily, weekly, and monthly basis against the agreed-upon service levels. Such reports shall track and display IT Customer Support performance and highlight exceptions and remediation plans for performance that does not meet the established service levels.
- Provide exception reporting which includes a corrective action plan for any services that fail to meet established service levels.
- Use the approved standard greeting, closing, and support scripts when handling phone inquiries.
- Analyze all incoming IT Customer Support calls and recommend operational efficiencies', on no less than a quarterly basis, as well as address capabilities of automation to WMATA's IT Customer Support functions, with a goal of reducing call volume, improving operational performance, efficiencies, and enhance IT Customer Support customer user experiences.
- Develop/update Procedures Manuals, Knowledgebase of operational procedures which meet WMATA requirements.

#### **a. Management and Control**

The services rendered under this SOW will be managed through an Operations Supervisor and two (2) technical leads, who will execute day to day operations of the ITCS in coordination with WMATA's management staff.

##### Operations Supervisor Role

- Serve as primary POC who operates in coordination with WMATA's ITCS management
- In coordination with WMATA's management, supervises daily operational support functions for WMATA's IT Customer Support Center, including implementation of systems necessary to document, track, and manage end-user service requests, inquiries and problem notifications.
- This role should ensure quality of services by adhering to quality assurance plan (QAP) and active call monitoring, ticket performance review, customer satisfaction surveys, technician coaching and development, disciplinary recommendations and actions.
- Review tickets transfers between support tiers (Tier I, Tier II, Tier III) and escalations to ensure issues are resolved within the most appropriate tier without unnecessary routing to higher tiers.
- Recruit, interview, hire and evaluate staff performance.
- Provide oversight for day to day services rendered by contractor's resources.
- Manage contractor's staffing needs such as hiring, resource planning, terminations
- Ensure tactical onsite oversight, coordination, and management of special services that include on-site moves, PC set-up and support, monitor and projector support and installation, and site and station manager kiosk support.
- Daily interactions with WMATA leadership regarding team performance, staffing plans, recruiting, interviewing and hiring, and administering disciplinary actions. These interactions include, but are not limited to, emails, phone calls, texts, and face-to-face meetings.
- Provide performance monitoring and inspection as outlined in WMATA Quality Assurance plans.

- Ensure daily, weekly, and monthly coaching and development.
- Monitor and manage technician staff attendance.
- Recommend and take disciplinary action and report such to WMATA leadership.
- Identify opportunities for process Improvement and implement in coordination with WMATA's management
- Provider periodic reports status reports

#### Technical Lead Role

- Tactical oversight and management of all Tier I and II support activities.
- Tactical onsite oversight, coordination, and management of special services that include on-site moves, PC set-up and support, monitor and projector support and installation, and site and station manager kiosk support.
- Daily Tier I and II work distribution to include, but not limited to, work plans, email support, and counter support.
- Provide performance monitoring and inspection as outlined in WMATA Quality Assurance plans.
- Review tickets transfers between support tiers (Tier I, Tier II, Tier III) and escalations to ensure issues are resolved within the most appropriate tier without unnecessary routing to higher tiers.
- Provide daily, weekly, and monthly coaching and development.
- Monitor technician staff attendance.
- Recommend disciplinary action to operations supervisor and WMATA's management.
- Provide tactical day-to-day operational supervision of staff to include call monitoring, ticket performance review, customer satisfaction surveys, technician coaching and development, disciplinary recommendations and actions, recruiting, interviewing, hiring and performance report generation and analysis.

#### **b. Tier I Support**

The Tier I team serves as the primary IT Customer Support interface between WMATA IT departments and all WMATA end-users. Tier I activities, include, but not limited to, the following:

- Provide 24x7x365 coverage for all Tier I customer-related issues.
- Intercept and initiate resolution of IT customer service requests via telephone, chat, fax, or e-mail.
- Log service tickets for every customer interaction regardless of the mode of communication (email, phone, fax, or chat).
- Troubleshoot, triage, and resolve service requests over the phone and/or via remote access.
- Escalate issues reported by WMATA's VIPs
- Report critical issues, which fall under WMATA's critical incident criteria to the designated incident management team. Non-Disclosure Agreement (NDA) required to release this criterion.
- Escalate to other support entities when unable to resolve within Service Level Agreement (SLA).
- Escalate to other support entities when issue requires a higher level of technical skills.
- Ensure trouble tickets are addressed in a timely fashion in accordance with WMATA-designated SLAs.
- Identify trouble ticket trends, escalate identified problems to supervisory personnel, and perform problem management to ensure problems are addressed in a timely fashion.
- Document service-related issues and proposed resolutions for inclusion in the ITCS knowledgebase.
- Perform administration services such as creation, access modification, and deletion of end-user accounts.

### **c. Tier II Support**

The Tier II support is involved in resolving complex issues, however, under situations requiring increased workforce at Tier I, such as surges in high call volume, Tier II resource may be partially or fully diverted to Tier I support.

- Provide onsite desk-side and remote technical support. The onsite support may require local travel.
- Intercept and manage customer IT service requests via telephone, fax, e-mail, or walk-in.
- Log a service ticket for every customer interaction regardless of the mode of communication (email, phone, fax, or walk-in).
- Provide infrastructure monitoring and critical events management support for MEMC. Proactively identify and escalate issues within WMATA's environments using existing processes and suite of enterprise monitoring tools within MEMC. Tier II resources supporting this function must have a strong understanding of all layers of the OSI model, network devices and enterprise monitoring tools. Strong server and data communications background is a must.
- Troubleshoot and triage service requests face to face and/or via remote access.
- Resolve service tickets or escalate to other support entities as needed and within SLA parameters.
- Support WMATA's PC Refresh Program. The program includes but not limited to: replacing old computers with new computers provided by WMATA; migrating data and settings from old computers to new computers; scheduling appointments with respective customers; performing surveys for quality assurance purposes and other administrative duties as needed.
- Support computer and peripheral moves for customers moving offices or cubicles to new locations.
- Provide special services that include on-site moves, Endpoint hardware setup and support, and projector support and installation, site and station manager kiosk support.
- Perform endpoint device imaging.

### **d. Business Process Analyst/Trainer**

This role supports continuous process improvement and Tier I/Tier II training needs:

- Understand, document/update ITCS processes and changes to the processes
- Create/update Knowledgebase articles for support staff
- Develop/update training materials for onboarding Tier I/II staff
- Conduct training for Tier I/II staff



#### **e. Break-Fix Support**

The contractor must maintain 2 (two) onsite Tier II technicians, who will handle day to day break-fix/repairs of damaged equipment (see section on Break-Fix Equipment for equipment details). The technicians who perform the hardware repairs must be certified/trained to perform IT equipment repairs. While on a service call, the contractor must fully restore the customer's equipment and functionality. The break-fix support resources shall be able to perform routine Tier I/II functions, based on the workload. The break-fix support includes but not limited to:

- Troubleshoot and repair damaged hardware
- Cleaning, testing, troubleshooting, and repair of referenced equipment.
- For under-warranty equipment, coordinate part/equipment replacement with the OEM
- For out-of-warranty equipment:
  - Research and specify replacement parts which meet or exceed the original part in quality and functionality. Provide cost estimates for the required replacement parts.
  - Order damaged parts and perform equipment repairs. Certain repairs, which outweigh the cost of repairs vs. replacement with new hardware, may require WMATA's approval.
  - In coordination with IT's inventory control team, maintain an optimal cache of commonly needed replacement hardware such as PC and Laptop components, monitors, printer components, UPS (including batteries), keyboards, mouse devices and other components to ensure rapid replacement/substitution of components not covered by a warranty.
- All break-fix activities must be logged and processed within WMATA's ticketing system.
- Maintain and provide monthly summary of break-fix.

In case of PC hard drive malfunction, the Contractor shall have a means of copying data from a failing hard drive onto an alternate hard drive. In the event of total loss of a hard drive and its' data, the Contractor shall supply an equivalent hard drive pre-loaded with the WMATA standard configuration. The Contractor is required to have an inventory of such devices for all WMATA PC types.

The Contractor must restore the customer's hardware back to its original condition excluding support of non-standard software and customer data. If repairing a monitor, mouse or keyboard or other component causes a change in the PC's software requirements (screen drivers, mouse drivers, CD-ROM drivers, etc.) then the contractor will also install those software components.

All hardware and printer preventive maintenance must be performed in accordance with manufacturer's suggested preventive maintenance.

Replacement of any equipment containing WMATA's data, such as hard disks, must be handled in accordance with WMATA's security policies and applicable data management standards.

#### **Break-Fix Equipment**

The equipment includes but not limited to computing hardware and peripheral: CPU chips, motherboards, tablets, interface cards, hard drives, memory, keyboards, monitors, printers (WMATA supplies the cartridges, ink, and other expendables for printers), tablets, UPS including the batteries, and other components, as well as restoration of software and data. Replacement of consumables is the responsibility of the WMATA.

#### **f. Training and Knowledge Transfer**

It is WMATA's requirement to enhance its operating and/or maintaining the IT Customer Support Center. Therefore, the contractor must determine the type of technical knowledge transfer necessary for process improvement and customer support satisfaction.

#### **g. SLAs**

Contractor is required to adhere to the following SLAs. Any changes to the SLAs shall be reviewed and approved by WMATA's management. The SLAs are provided for initial baseline and are subject to change, as WMATA's business needs change and process/technologies improvements lead to different set of SLAs. Any such changes will be reviewed with the contractor by WMATA's management.

##### Tier I and Tier II

- Tier I Coverage: 24 hours a day, 7 days a week, 365 days a year
- Tier II Helpdesk Coverage: Onsite 6:00am to 11:00pm (Monday – Friday), on-call on weekends.  
Note: During special regional events, Tier II on-site coverage may be extended to 24x7 upon approval by the COTR. During events such as office-moves, the Tier II personnel may be required to work onsite during the weekends.
- Tier II Monitoring Center Coverage: Resources covering enterprise monitoring will generally support 2 evening shifts and weekends, 365 days a year. The shifts may change depending upon of the level of coverage required. Tier I support staff may be used to supplement the monitoring center coverage under certain circumstances.
- Call Response Time: 90% of all calls answered within 30 seconds
- First Call Resolution Rate: 75% of all Tier I issues addressed are resolved during the initial interaction
- First Call Resolution Rate: 85% of all calls escalated to Tier II are resolved on the first Tier II interaction
- Chat inquiries are responded to within 30 seconds of notification
- Emails are responded to within 15 minutes of initial receipt

##### Break-Fix

The hardware repairs must be performed based on the following SLAs, in descending order of priority (priorities will be assessed and assigned by WMATA):

- Priority 1 Callback within 1 hour and resolve within 4 hours.
- Priority 2 Callback within 2 hours - resolve within 1 workday.
- Priority 3 Callback within 4 work hours - resolve within 2 workdays.
- Priority 4 Callback within 4 work hours - resolve within 1 work week.

#### **5. Period of Performance**

This is Firm Fixed price and any changes to resources and service provisioning, must be requested in-writing and approved by the COTR. The period of performance will be three (3)-year base and four (4) option years.

#### **6. Place of Performance**

Tasks associated with this engagement will be performed at WMATA's sites within the Washington DC Metropolitan region. Primary location for Tier I and Tier II staff will be Jackson Graham Building (JGB) at 600 5<sup>th</sup> Street NW, Washington, DC 20001 and the Secondary Site - Carmen Turner Facility (CTF) at the

3500 Pennsy Drive, Hyattsville, Maryland 20785. Some staff will be housed in other sites throughout the NCR (**National Capital Region**). The locations are subject to change based on Authority's business needed.

Contractor must be responsible for covering any indirect expenses related to travel, hotel, rental, food, phone call and parking unless authorized by the COTR for this contract. Any expenses approved by the COTR must be invoiced against, other direct costs (ODC) account.

#### **7. Tasks, Milestones, Deliverables**

Following contractor deliverables are provided as initial baseline. Any changes to the document delivery schedules and format will be approved by WMATA's management.

Deliverable	Format	Schedule
Communications Plan Transition Plan Performance Management Plan Contingency and Disaster Recovery Plan Disciplinary Action Plan Attendance Management Plan Risk Management Plan	MS Word	15 Days after award 15 Days after award 15 Days after award 15 Days after award 15 Days after award 15 Days after award 15 Days after award 15 Days after award
Document Field Standards. Standards for format & content to enable review for compliance.	MS Word	60 Days after award
Formal review/presentation of the status of the task, including accomplishments, issues, action plans.	PowerPoint & Oral	Monthly
<b>Monthly Program Status and Performance Progress Report.</b> Documents the status of the task, including Summary of Assigned Work; Summary of Accomplished Work to include customer contact and work definition; Summary of delivered products and meetings attended; Summary of WMATA technical directions; Summary of WMATA contractual changes; Current management and administrative problems; Quality assurance problems; Technical issues for WMATA determination; Contractual issues for WMATA determination; Lessons learned; Cost savings and quality improvement recommendations; Communication and coordination activities and Action items	MS Word and PowerPoint	Monthly
<b>Contractor Performance Report.</b> Provides metrics representing the Contractor's actual level of performance compared to the SLAs.	MS Word/Excel	Monthly
<b>Executive Summary Reports</b>	Excel/PowerPoint	Monthly
<b>Process Improvement Report.</b> Captures lessons learned and outlines process improvement opportunities and plans. The process improvements shall continuously be incorporated into the Quality Assurance Plan.	MS Word	Ongoing
<b>Minutes from formal meetings between WMATA and Contractor.</b> Serves to capture relevant points of discussions, decisions, and action items.	MS Word	3 days after a meeting

<b>Deliverable</b>	<b>Format</b>	<b>Schedule</b>
<b>Employee Roster (Program Management and all Tiers</b> Contains the Name and Title of the Employee.	MS Excel	Monthly
<b>Weekly Performance Meeting to discuss performance impacting issues.</b>	Face-to-Face	Weekly

All documentation must be produced and delivered in editable format using the tools currently use in WMATA, which primarily consist of Microsoft Office suite of products with drawings in Microsoft Visio format. If any other document formats are required by the contractor, an approval must be obtained from the Authorized POC.

#### **WORK PRODUCTS:**

Any inventions, combinations, machines, methods, formulae, techniques, processes, improvements, software designs, computer programs, strategies, specific computer-related know-how, data and original works of authorship discovered, created, or developed by Contractor, or jointly by Contractor and an Authorized WMATA POC in the execution of this SOW shall be deemed Work Product. Configuration of software shall not be deemed Work Product. All provisions of the Contract regarding Work Product shall apply to this SOW.

### **8. Submittal Requirements**

Contractor must provide the following as part of the RFP:

1. A detailed technical approach addressing
  - Customer support operation optimization
  - Desktop environment transformation
  - Endpoint Asset Management
  - ITIL practices in customer service
  - Transition Methodology
  - Strategy for VIP Support
2. Quality Assurance Plan addressing services, processes, technical and personnel.
3. Past performance related to the scope of this SOW.
  - Provide number of years performing the work similar to this SOW
  - Incentives used to for staff retention
  - Provide at least 3 separate customers' references which WMATA may call
  - Provide the type of support contract providing similar services as required in this SOW, duration of the contact, date of award of the contract
  - Provide the sizes of the organizations supported thru the contracts submitted as an evidence of the past performance
  - Provide level of VIPs supported in the referenced past performance work
  - Clearly indicate if the past contracts completed their period of performance. If the period of performance was not completed, an explanation must be provided.
4. Bench Strength addressing contractor's ability to replace a resource provided under this SOW

### **9. Assumptions and Roles and Responsibilities**

This section contains assumptions specific to this engagement.

1. WMATA will provide any computer equipment (such as Laptop computer) and tools (such as MS Office, Visio etc.) for contractor's personnel performing the onsite and remote work. However, exceptions may apply.
2. WMATA does not provide mobile communication devices for voice and email. The contractor will ensure all personnel who need to be accessible via phone and/or email are furnished with appropriate communication devices at contractor's expense.
3. The contractor must present resumes of potential candidates with WMATA's management. WMATA's management may interview the candidates before final selection is made.
4. WMATA's management will oversee the overall delivery of services under this contract.
5. Any personnel violating WMATA's policies and procedures will be removed by the contractor immediately upon notification by the COTR and or the contracting officer. The resource must be replaced by the contractor within 5-7 business days or as determined by WMATA leadership and business needs.
6. Any personnel who are not able to perform, exhibit unprofessional behavior and/or receive consistent customer-complaints, will be given one verbal warning, followed by one written warning and ending with removal from the contract. The resource will be replaced by the contractor within 5-7 business days or as determined by WMATA leadership and business needs.
7. Contractor will use insured logistic resources (transportation and personnel) during equipment move between WMATA sites, performed by the contractor. Contractor-managed moves will be coordinated with COTR.
8. Any expenses for break-fix parts or logistics support, must be pre-approved by the COTR. The approved expenses shall be handled by the contractor and later invoiced to WMATA for reimbursement.

#### **10. Quality Management**

**Contractor Quality Assurance:** In accordance with IT's Quality Policy, the contractor must propose and implement a quality assurance plan (QAP) to ensure that the processes, resources, products and services delivered under this SOW are monitored, managed and adhere to WMATA's prevailing quality standards for IT Customer Support. The QAP will be used to achieve continuous process improvement leading to optimal delivery of the services.

The contractor is expected to correct any process, service and resource deficiencies identified through QAP processes and remediate these deficiencies from recurrence. The prime contractor is required to have valid ISO 9001:2015 and ISO 20000 certifications at the time of award of this contract.

WMATA's existing quality program may supersede contractor's proposed QAP. The contractor is expected to identify opportunities for improvements to the existing quality through close coordination with WMATA's management. Any approved changes should be added to the QAP and respective processes by the contractor.

The contractor will periodically develop formal quality metrics reports and review the reports on monthly basis with WMATA's management. WMATA's current target is to meet its quality targets by 95% or higher.

**Quality Assurance Surveillance:** WMATA's management shall evaluate the contractor's performance by multiple means which may include but not limited to: quality metrics reviews, listening to recordings of the support calls, customer feedback using surveys and/or through direct customer-outreach, contractor's adherence to established processes and SLAs (as referenced in section G) reduction of recurring issues and technical quality of resources.

#### **11. Professional Development**

The contractor will be responsible for ensuring that the support resources, provided within the scope of this SOW, stay up-to-date with both the current and newer hardware/software technologies by offering continuous education and training opportunities to the support staff. Any education and training expenses must be performed at contractor's own expense.

Contractor should address its approach for continuous training/education and any incentives for retention of the qualified staff in their proposal.

## **12. Security Requirements**

For any individual Authorized POC location, security procedures include but not be limited to: background checks, records verification, photographing, and fingerprinting of contractor's employees or agents. Contractor will, at any time, be required to execute and complete, for each individual contractor's employee or agent, additional forms which may include non-disclosure agreements to be signed by contractor's employees or agents acknowledging that all WMATA's information with which such employees and agents come into contact is confidential and proprietary. Any unauthorized release of proprietary information by the contractor or its employee or agent of the contractor shall constitute a breach of the contract.

The contractor's personnel who need WMATA's building pass and/or network access will require a security background check. WMATA's Authorized POC will determine if such an access is desired. The contractor's personnel must adhere to all of WMATA's standard security requirements.

## **13. Risk Management**

Contractor will be responsible for developing a risk management plan for this project. Throughout the period of performance, if contractor identifies any risks, the risks and mitigation plans must be discussed with the Authorized POC prior to executing the work.

## **14. Reporting**

The type's reports and frequency of reporting may vary based on organizational needs and changes to the organization processes. Following reporting needs are provided as a baseline:

**Weekly Status Update.** The weekly status report, to be submitted by the contractor to the Authorized POC, should include: accomplishments to date as compared to the project plan; any changes in tasks, resources or schedule with new target dates, if necessary; all open issues or questions regarding the services provided; action plan for addressing open issues or questions and potential impacts on the support; risk management reporting.

**Monthly Service Delivery Report.** Report on monthly service metrics, identification of key service-related, resource levels and service improvements.

**Break-Fix Reports.** The contractor must provide a monthly report of all hardware parts replacement transactions.

## **15. Evaluation Criteria**

WMATA will select the best value solution for the agency. The following key factors will be for evaluating the contractor solutions. WMATA may reject disqualify proposals which do not fully and clearly address the requirements of the evaluation criteria.

1. Technical Approach
2. Contractor's Past Performance
3. Transition Approach
4. Bench Strength

**ATTACHMENT 3**

**BASE YEARS**

CLIN	Description (List By Position Title)	Unit of Measure	Quantity	Unit Price	Estimated Hours	Total Labor (Quantity*Unit Price*Estimated Hours)
1	Operations Supervisor	each	1			
2	Business Process Analyst / Trainer	each	1			
3	Help Desk Tier III-Lead	each	2			
4	Help Desk Tier II	each	12			
5	Help Desk Tier I	each	12			
6	Maintenance Technician/ Break Fix	each	2			
7	Imaging Technician	each	1			
8	PC Refresh and Surge Requirements	each	4			
	Overhead ___%					Fully Loaded Labor (Total Labor * Overhead)
	<b>Overhead</b>					
	<b>Total Labor (Direct Labor + Overhead)</b>					
	<b>Profit/Fee</b>				___%	

**OPTION 1**

CLIN	Description (List By Position Title)	Unit of Measure	Quantity	Unit Price	Estimated Hours	Total Labor (Quantity*Unit Price*Estimated Hours)
1	Operations Supervisor	each	1			
2	Business Process Analyst / Trainer	each	1			
3	Help Desk Tier III-Lead	each	2			
4	Help Desk Tier II	each	12			
5	Help Desk Tier I	each	12			
6	Maintenance Technician/ Break Fix	each	2			
7	Imaging Technician	each	1			
8	PC Refresh and Surge Requirements	each	4			
	Overhead ___%					Fully Loaded Labor (Total Labor * Overhead)



	Overhead				
	<b>Total Labor (Direct Labor + Overhead)</b>				
	<b>Profit/Fee</b>			___%	

### OPTION 2

CLIN	Description (List By Position Title)	Unit of Measure	Quantity	Unit Price	Estimated Hours	Total Labor (Quantity*Unit Price*Estimate Hours)
1	Operations Supervisor	each	1			
2	Business Process Analyst / Trainer	each	1			
3	Help Desk Tier III-Lead	each	2			
4	Help Desk Tier II	each	12			
5	Help Desk Tier I	each	12			
6	Maintenance Technician/ Break Fix	each	2			
7	Imaging Technician	each	1			
8	PC Refresh and Surge Requirements	each	4			
	Overhead ___%					Fully Loaded Labor (Total Labor * Overhead)
	<b>Overhead</b>					
	<b>Total Labor (Direct Labor + Overhead)</b>					
	<b>Profit/Fee</b>				___%	

### OPTION 3

CLIN	Description (List By Position Title)	Unit of Measure	Quantity	Unit Price	Estimated Hours	Total Labor (Quantity*Unit Price*Estimate Hours)
1	Operations Supervisor	each	1			
2	Business Process Analyst / Trainer	each	1			
3	Help Desk Tier III-Lead	each	2			
4	Help Desk Tier II	each	12			
5	Help Desk Tier I	each	12			

6	Maintenance Technician/ Break Fix	each	2			
7	Imaging Technician	each	1			
8	PC Refresh and Surge Requirements	each	4			
	Overhead ____%					Fully Loaded Labor (Total Labor * Overhead)
	<b>Overhead</b>					
	<b>Total Labor (Direct Labor + Overhead)</b>					
	<b>Profit/Fee</b>					
					____%	

### OPTION 4

CLIN	Description (List By Position Title)	Unit of Measure	Quantity	Unit Price	Estimated Hours	Total Labor (Quantity*Unit Price*Estimated Hours)
1	Operations Supervisor	each	1			
2	Business Process Analyst / Trainer	each	1			
3	Help Desk Tier III-Lead	each	2			
4	Help Desk Tier II	each	12			
5	Help Desk Tier I	each	12			
6	Maintenance Technician/ Break Fix	each	2			
7	Imaging Technician	each	1			
8	PC Refresh and Surge Requirements	each	4			
	Overhead ____%					Fully Loaded Labor (Total Labor * Overhead)
	<b>Overhead</b>					
	<b>Total Labor (Direct Labor + Overhead)</b>					
	<b>Profit/Fee</b>					
					____%	

**Extended coverage under special regional events base years plus 4 options**

<b>Support Element</b>	<b>Base Estimated Hours</b>	<b>Optimal Quantity</b>	<b>GS-35F-0423N and Historic Hourly Rates</b>	<b>Annual Cost (Estimated)</b>
<b>A. Labor</b>				
Operations Supervisor		1		
Business Process Analyst / Trainer				
Help Desk Tier III-Lead		1		
Help Desk Tier II		1		
Help Desk Tier I		1		
Maintenance Technician/ Break Fix		0		
Imaging Technician		0		
PC Refresh and Surege Requirements		0		
<b>Direct Labor</b>				
<b>B.</b>				
Other Direct Costs (ODC) - NTE estimates	N/A	1		
<b>Total</b>				





WASHINGTON METROPOLITAN AREA TRANSIT AUTHORITY

# **Request For Proposals (Non-Federal)**

## **Helpdesk Support Services**

**RFP No. : # CQ18047**

**Date: September 25<sup>th</sup>, 2017**

Date:

SUBJECT: RFP No. # CQ18047

Dear Sir/Madam:

The Washington Metropolitan Area Transit Authority (WMATA) requires the services of a qualified contractor to provide Helpdesk Support Services.

If you have any technical, contractual, or administrative questions, please e-mail them to [BACrowell@wmata.com](mailto:BACrowell@wmata.com) no later than Close of Business, **October 25<sup>th</sup>, 2017**. WMATA will provide written answers, by e-mail to all those who obtain the RFP and provide their e-mail addresses. If an amendment(s) is issued resulting from questions and answers, it will be posted on our website, and a copy will be mailed to all offerors so that they can acknowledge receipt.

Your proposal must be received with all required submittals as stated in the RFP, no later than **2:00PM, November 17, 2017** to WASHINGTON METROPOLITAN AREA TRANSIT AUTHORITY 600 5th Street, N.W., Washington, DC 20001 Room 3C-02.

Sincerely,

A handwritten signature in blue ink that reads "Monique M. Anderson". The signature is written in a cursive style.

Contracting Officer  
Office of Procurement and Materials