

**Electronic and Information Technology (E&IT) Requirements and Design Specification,
Testing, Validation and Verification, and Remediation of Section 508 Compliance**

Blanket Purchase Agreement—Statement of Work

**General Services Administration (GSA)
Office of Chief Information Officer (OCIO)**

1.0 INTRODUCTION

This Statement of Work (SOW) seeks support for the General Services Administration (GSA) in its goals of achieving compliance with the statutory requirements of Section 508 of the Rehabilitation Act, for access to electronic and information technology (EIT) to persons with disabilities.

1.1.1 BACKGROUND

Section 508 of the Rehabilitation Act of 1973, requires that when Federal agencies develop, procure, maintain, or use E&IT, they provide those employees with disabilities comparable access as those without disabilities unless an undue burden would be imposed on the agency. Section 508 also requires that individuals with disabilities, who are members of the public seeking information or services from a Federal agency, have access to and use of information and data that is *comparable to that provided to the public who are not individuals with disabilities*, unless an undue burden would be imposed on the agency.

E&IT includes any equipment or interconnected subsystem of equipment that is used in the creation, conversion or duplication of data or information. This includes computers, ancillary equipment, software, firmware and similar procedures, services (including support services), telecommunication products (e.g. telephones), information kiosks, transaction machines, World websites, multimedia products, and office equipment (e.g. copiers and fax machines).

The United States Access Board is responsible for developing accessibility standards for E&IT, for incorporation into regulations that govern Federal procurement practices. On December 21, 2000, the Board issued accessibility standards for electronic and information technology under section 508 of the Rehabilitation Act, as amended (36 CFR Parts 1193 and 1194).

1.1.2 PURPOSE

The General Services Administration (GSA) is required to ensure that its Services and Staff offices' websites, applications, documents, forms, records and other E&IT are Section 508 compliant. The purpose of this procurement is to acquire the expert assistance needed for Section 508 requirements and design specification, compliance testing, validation, verification and/or remediation of websites, and software applications and documentation.

2.0 SCOPE OF WORK

The contractor must have extensive knowledge of Section 508, accessible design methods, and the applicable technical standards for EIT.

The contractor is to provide expert assistance in Section 508 requirements and design specification, compliance testing, validation, verification, and remediation functions as specified in the Scope of Work (SOW) for each Task Order, in the areas including but not limited to the following:

- software applications and operating systems including commercial off-the-shelf application (COTS),
- web-based intranet and internet information and applications, including support documentation (e.g. PowerPoint presentations, PDFs, etc.).

The contractor is to acquire or develop the tools and methodologies necessary to determine Section 508 compliance of EIT at the contractor's expense, unless otherwise specified by the GSA in the Statement of Work of each task order.

The contractor will advise the Government on industry best practices and procedures to best accomplish continual Section 508 compliance of EIT, and may also be required to provide specialized training in areas of requirements and design specification, compliance testing, validation, verification and remediation functions.

3.0 TASKS

The GSA expects to award one or more tasks under the BPA over the period of the contract. Vendors are invited to bid on one or more of the tasks in the functional lots that they qualify under. Vendors may qualify for one or more lots. When tasks are awarded it may be a single task or multiple tasks in one or more lots and it may be to one or more vendors.

3.1 PROJECT MANAGEMENT

For each awarded task, the contractor will organize a contractor project team and attend a project kick off meeting scheduled by the GSA, Contracting Officer's Technical Representative (COTR) to discuss project team organization, project plan, schedule, and administrative arrangements. The contractor may be required to refine the project plan as a result of the project kick off meeting. Project kick off meetings may be combined as practicable for multiple tasks awarded to a single vendor. The contractor also may be required to attend status meetings scheduled by the GSA Contracting Officer's Technical Representative (COTR), and provide work progress along with critical issues to be resolved.

The contractor must state in its proposal to the GSA, the tools and methodologies that will be used to accomplish the requirements of a Task Order. Additionally, the contractor must provide to the Government written Task Order project reports describing work completed, work in progress, schedule variances and work planned for the next reporting period. The status reports will also describe outstanding issues, their associated risks and risk mitigation plans, earned value which shows actual work completed in relation to work planned for completion, and updated project schedules documenting the actual progress against initial baselines.

At the conclusion of each project unless otherwise specified in the Scope of Work for each Task Order, the contractor is required to provide the Government comprehensive documentation to support the contractor's findings, conclusions, and recommendations including remediation solutions. This documentation can be provided to the GSA in various media formats, and should include at a minimum the elements listed below.

- Requirements and User Interface (UI) Design Specification — participate in low-fidelity UI prototype walkthroughs to uncover potential accessibility issues and validate Section 508 requirements; review UI design specification; and develop recommendations.
- Assessment and Implementation Strategy — define assessment methods/tools used to test, validate and verify Section 508 compliance; and, define recommended methods/tools to ensure successful implementation of new and/or remediate web pages, software applications and other E&IT as specified in the Scope of Work for the Task Order.
- Coding and Testing — provide software program codes and scripts used to test, validate and verify Section 508 compliance. This includes codes and scripts that are to be used for the implementation of new and remediate web pages, software applications and other E&IT as specified in the Scope of Work for the Task Order.
- Usability Testing — provide test scenarios; recruit users with disabilities; conduct usability testing of primary tasks to ensure the website or system provides intended users with the legally-mandated “comparable experience.” Provide test reports and remediation recommendations.
- Installation and Training — define plan for installing and training on all software applications or scripts developed to accomplish the requirements specified in the Scope of Work for the Task Order.
- Remediation Project Planning — define project plan for remediation activities including but is not limited to, project tasks, milestones, schedules, deliverables, resources requirements and training.
- Quality Assurance Plan — develop processes or methods for continual testing and maintenance of compliant web pages, software applications and other E&IT as specified in the Scope of Work for the Task Order; and provide telephone and/or on-site support to address issues and concerns relating to software program codes, developed scripts, and methods maintaining compliant web pages, software applications and other E&IT as specified in the Scope of Work for the Task Order. Support shall include a process for categorizing the severity of a problem, and an escalation process to handle problems of high severity, or criticality to daily business functions.

3.2 Testing Phase LOT 1

3.2.1 Section 508 User Requirements - 1194.21. (Requirements Phase) LOT 1

The contractor must document, at a minimum, the user requirements listed below:

- **The context of use:** the intended users, their goals and tasks, associated equipment, and the physical and social environment in which the product can be used. Additional data on intended users with disabilities shall be included.
- **User performance and satisfaction criteria:** measures of usability and accessibility for the product.

- **The test method and context of testing:** the method to be used to test whether the usability and accessibility requirements have been met and the context in which the measurements will be made.

The contractor must use the National Institute of Standards and Technology Common Industry Specification for Usability Requirements (NISTIR 7432) to document these requirements.

3.2.2 Section 508 Design Specification - 1194.21. (Analysis and Design Phase) LOT 1

The contractor must use, at a minimum, the technical standards listed below to validate Section 508 compliance in the design specification of intranet and internet websites, web-applications, software applications, and operating systems.

The contractor must also produce the following reports:

Paper Prototype Walkthrough Report. A member of the design team, typically a usability specialist, walks through a low-fidelity (paper, PowerPoint, or Visio) prototype with the Section 508 contractor to uncover potential issues. Some potential issues can be resolved at this early stage, while others cannot be resolved until there is actual UI code. The latter are simply identified and tracked as potential risks to be reviewed during design and development.

UI Specification Inspection Report. When the UI specification is in draft, a member of the design team, typically a usability specialist, reviews the UI design with the Section 508 contractor, to resolve potential issues and document accessibility requirements. Analysis of Section 508 issues in the past has shown that when the UI specification does not specifically address accessibility requirements, many important details are left to chance during development.

Development Checkpoint Reports. At designated checkpoints during the development process, identified in the Project Plan, the Section 508 contractor will review the work to ensure that the user interface has been implemented as designed and document the results.

The contractor should reference the checklists and additional information found in the Government Accessibility Evaluation Guidelines.

3.2.1 Software applications and operating systems - 1194.21. (Testing Phase) LOT 1

The Section 508 technical standards listed below are applicable for both software applications and operating systems. They address program features that must be contained in software for the product to meet Section 508 compliance. A software product can either build all accessibility features in, or be compatible with assistive technology.

The contractor must use at a minimum, the technical standards listed below as a benchmark to test, validate, and verify software applications and operating systems for Section 508 compliance.

- (a) When software is designed to run on a system that has a keyboard, product functions shall be executable from a keyboard where the function itself or the result of performing a function can be discerned textually.

(b) Applications shall not disrupt or disable activated features of other products that are identified as accessibility features, where those features are developed and documented according to industry standards. Applications also shall not disrupt or disable activated features of any operating system that are identified as accessibility features where the application programming interface for those accessibility features has been documented by the manufacturer of the operating system and is available to the product developer.

(c) A well-defined on-screen indication of the current focus shall be provided that moves among interactive interface elements as the input focus changes. The focus shall be programmatically exposed so that assistive technology can track focus and focus changes.

(d) Sufficient information about a user interface element including the identity, operation and state of the element shall be available to assistive technology. When an image represents a program element, the information conveyed by the image must also be available in text.

(e) When bitmap images are used to identify controls, status indicators, or other programmatic elements, the meaning assigned to those images shall be consistent throughout an application's performance.

(f) Textual information shall be provided through operating system functions for displaying text. The minimum information that shall be made available is text content, text input caret location, and text attributes.

(g) Applications shall not override user selected contrast and color selections and other individual display attributes.

(h) When animation is displayed, the information shall be displayable in at least one non-animated presentation mode at the option of the user.

(i) Color coding shall not be used as the only means of conveying information, indicating an action, prompting a response, or distinguishing a visual element.

(j) When a product permits a user to adjust color and contrast settings, a variety of color selections capable of producing a range of contrast levels shall be provided.

(k) Software shall not use flashing or blinking text, objects, or other elements having a flash or blink frequency greater than 2 Hz and lower than 55 Hz.

(l) When electronic forms are used, the form shall allow people using assistive technology to access the information, field elements, and functionality required for completion and submission of the form, including all directions and cues.

3.2.2 Web-based intranet and internet information and applications - 1194.22 (Testing Phase) LOT 1

The Section 508 technical standards listed below are applicable for web-based intranet and internet information and applications.

The contractor must use, at a minimum, **the user performance and satisfaction criteria as specified in the requirements document** and the technical standards listed below as benchmarks against

which to test, validate, and verify web-based intranet and internet information and applications for Section 508 compliance.

A website will be in compliance with the 508 standards if it meets paragraphs (a) through (p) as indicated below, and the specified user performance and satisfaction criteria.

- (a) A text equivalent for every non-text element shall be provided (e.g., via "alt", "longdesc", or in element content).
- (b) Equivalent alternatives for any multimedia presentation shall be synchronized with the presentation.
- (c) Web pages shall be designed so that all information conveyed with color is also available without color, for example from context or markup.
- (d) Documents shall be organized so they are readable without requiring an associated style sheet.
- (e) Redundant text links shall be provided for each active region of a server-side image map.
- (f) Client-side image maps shall be provided instead of server-side image maps except where the regions cannot be defined with an available geometric shape.
- (g) Row and column headers shall be identified for data tables.
- (h) Markup shall be used to associate data cells and header cells for data tables that have two or more logical levels of row or column headers.
- (i) Frames shall be titled with text that facilitates frame identification and navigation.
- (j) Pages shall be designed to avoid causing the screen to flicker with a frequency greater than 2 Hz and lower than 55 Hz.
- (k) A text-only page, with equivalent information or functionality, shall be provided to make a web site comply with the provisions of this part, when compliance cannot be accomplished in any other way. The content of the text-only page shall be updated whenever the primary page changes.
- (l) When pages utilize scripting languages to display content, or to create interface elements, the information provided by the script shall be identified with functional text that can be read by assistive technology.
- (m) When a web page requires that an applet, plug-in or other application be present on the client system to interpret page content, the page must provide a link to a plug-in or applet that complies with §1194.21(a) through (l).
- (n) When electronic forms are designed to be completed on-line, the form shall allow people using assistive technology to access the information, field elements, and functionality required for completion and submission of the form, including all directions and cues.
- (o) A method shall be provided that permits users to skip repetitive navigation links.
- (p) When a timed response is required, the user shall be alerted and given sufficient time to indicate more time is required.

3.3 Support Phase LOT 1

3.3.1 Software Applications and Operating Systems - 1194.21 (Support Phase) LOT 1

The contractor will provide resolution and support to the GSA services and staff offices, for problems and errors found in the testing of software applications and operating systems. The following activities may be required:

- Develop project plan for corrective action including but is not limited to, project tasks, milestones, schedules, deliverables, resources requirements and training,
- Provide staff support to the GSA services and staff office personnel for correcting problem and errors with non-compliant software applications and operating systems,
- Provide documentation in support of contractor's methodologies, findings, conclusions, and recommendations for corrective measures to achieve Section 508 compliance,
- Provide training to GSA services and staff offices personnel on automated tools, and methodologies used to correct problems or errors found in testing of software applications and operating systems for Section 508 compliance.
- Prepare "How To" documentation and training materials to inform, train, and assist the GSA services and staff offices personnel in making software applications and operating systems Section 508 compliant.

3.3.2 Web-based intranet and internet information and applications - 1194.22 (Support Phase) LOT 1

The contractor will provide comprehensive resolution and support to the GSA services and staff offices, for problems and errors found in the testing of web-based intranet and internet information and applications. The following activities may be required:

- Develop project plan for corrective action including but is not limited to, project tasks, milestones, schedules, deliverables, resources requirements and training,
- Provide staff support to the GSA services and staff office personnel for correcting problem and errors with non-compliant web-based intranet and internet information and applications,
- Provide documentation in support of contractor's methodologies, findings, conclusions, and recommendations for corrective measures to achieve Section 508 compliance,
- Provide training to GSA services and staff offices personnel on automated tools, and methodologies used to correct problems or errors found in testing of web-based intranet and internet information and applications for Section 508 compliance.
- Prepare "How To" documentation and training materials to inform, train, and assist the GSA services and staff offices personnel in making intranet and internet information and applications Section 508 compliant.

- Provide software program codes and scripts when required, used to test, validate and verify web content for Section 508 compliance.

3.4 Operational and Functional Assessment – LOT 2

The contractor will conduct an ongoing assessment of the GSA's software applications, operating systems, and web-based intranet and internet information and applications for Section 508 compliance, in accordance with the technical standards listed in Sections 3.2.1 and 3.2.2 respectively. The following activities may be required:

- Develop or recommend processes or methods for continual testing and maintenance of Section 508 compliant software applications, operating systems, and web-based intranet and internet information and applications.
- Review, revise or prepare an agency-wide Strategic Plan for requirements and design specification, testing, corrective action, remediation, training and operational and functional assessment of the GSA's software applications, operating systems, and web-based intranet and internet information and applications for Section 508 compliance.
- Create and maintain on-site test lab environment at the GSA headquarters' location for testing, corrective action, remediation, and operational and functional assessment of the GSA's software applications, operating systems, and web-based intranet and internet information and applications for Section 508 compliance. Payment or reimbursement of funds for ongoing maintenance of on-site test lab will be issued by the GSA to the contract upon availability of funds.
- Develop and provide specialized training plans and training materials for GSA services and staff offices personnel to inform them of methodologies, processes, and industry best practices for making the GSA's software applications, operating systems, and web-based intranet and internet information and applications Section 508 compliant and comparably accessible to users with disabilities. Training offered by the contractor should be presented in various formats and media, and must meet the technical standards for EIT under Section 508.

3.5 Remediation Support LOT 3

The contractor will provide comprehensive remediation testing of older software applications, operating systems, and web-based intranet and internet information and applications. The contractor will also provide resolution and support to the GSA services and staff offices, for problems and errors found in testing. The following activities may be required:

- Perform operational and functional analysis of software applications, operating systems, and web-based intranet and internet information and applications to determine remediation action is feasible or cost effective.
- Develop project plan for remediation action including but is not limited to, project tasks, milestones, schedules, deliverables, resources requirements and training,

- Provide staff support to the GSA services and staff office personnel for correcting problem and errors with non-compliant software applications, operating systems, and web-based intranet and internet information and applications,
- Provide documentation in support of contractor's methodologies, findings, conclusions, and recommendations for corrective measures of remediate software applications, operating systems, and web-based intranet and internet information and applications,
- Provide training to GSA services and staff offices personnel on automated tools, and methodologies used to correct remediate problems or errors found in testing for Section 508 compliance.
- Prepare "How To" documentation and training materials to inform, train, and assist the GSA services and staff offices personnel in making remediate intranet and internet information and applications Section 508 compliant.
- Provide software program codes and scripts when required, used to test, validate and verify web content for Section 508 compliance.

3.6 Training LOT 4

The contractor will develop and provide specialized training plans and training materials for GSA services and staff offices personnel to inform them of methodologies, processes, and industry best practices for making the GSA's software applications, operating systems, and web-based intranet and internet information and applications for Section 508 compliant and comparably accessible to users with disabilities. Training offered by the contractor should be presented in various formats and media, and must meet the technical standards for EIT under Section 508.

4. TECHNICAL ENVIRONMENT

Customer requirements will vary across the spectrum of existing and future software applications, hardware infrastructures and platforms. Therefore, the GSA shall provide to the Contractor, a description of technical environments, and information on software and hardware platforms in the Scope of Work for each Task Order. The Contractor must receive written or verbal consent from the GSA to use all Government owned hardware and software in support Section 508 compliance testing, validation and verification. Additionally, all Contractor owned hardware and software used in support of Section 508 compliance testing, validation and verification shall conform to the GSA, OCIO technical standards profile. Examples of software applications, infrastructures and platforms that the Contractor might be required to perform testing, validation and verification of Section 508 compliance are below.

4.1 Standards Profile

- **4.1.1 Service Access and Delivery**

- **WEB Browser** – MS Internet Explorer 6.0.
- **Personal Digital Assistant:**
- **Wireless PDA:** OCIO supported Blackberry devices
- **Wired PDA:** Any PalmOS, Windows CE devices.

- **Electronic Messaging** - IBM Lotus Notes 6.x (client); IBM Lotus Domino 6.x (server); Tumbleweed E-mail Firewall (EMF); Cloudmark Immunity (Anti-spam); Wireless (Blackberry); SMTP; MIME; LISTSERV 15.x.
 - **Workgroup Computing** – IBM Lotus Notes 6.x (client); IBM Lotus Domino 6.x (server); IBM Lotus SameTime 6.5.x; IBM Lotus QuickPlace 6.5.x; Accessible FormNet 2.x.
 - **Thin Client** – Windows 2003 Terminal Services, Metaframe Presentation Server.
 - **Remote Access** – Cisco AS5350; Virtual Private Network (VPN) Next Generation (NG) FP3.
 - **Information Technology Security:**
 - Authentication** – **LAN/WAN FW:** CheckPoint FW NG, Cisco PIX (LAN and site-to-site WAN bridging only)
 - VPN:** CheckPoint VPN NG, Smartgate VPN, Secure Client, and Cisco PIX for site-to-site WAN bridging, Citrix SSL VPN
 - Encryption:** SSH, SFTP, SSL, Credant, Mobile Guardian (for laptop, desktop, USB, encryption)
 - Core security product (SSO):** M-Tech Suite (P-Sync and ID-Sync), ActivIdentity SecureLogin.
 - Authorization - Virus and Spyware Protection:** McAfee
 - Web/Content Filtering:** Websense
 - Administration** - NetIQ
 - Audit - LAN/WAN IDS:** ISS Real Secure, Network Flight Recorder, Snort; Cisco IDS, CA etrust IDS (LAN only)
 - Scanners:** McAfee Foundstone Enterprise Scanning Tool, WebInspect, AppDetective
 - Assessment Tools:** ASSERT
 - **Network Operating System** - MS Windows 2000 Server w/Active Directory
 - **Directory Services and Provisioning** - Microsoft Windows 2000 Active Directory (AD); AD integrated or LDAP compliant application directories
 - **Voice over Internet Protocol** - SIP
- **4.1.2 Service Platform and Infrastructure**
 - **Intel Laptop and Desktop Hardware** – Direction as dictated by the GSA Hardware BPA (<http://hwbpa.gsa.gov>).
 - **Desktop Operating System** – Windows XP SP2
 - **Delivery Servers:** Application server (major Web apps): Oracle 9iAS / 10gAS (any edition); Application server (minor Web apps): Oracle 9iAS / 10gAS; MS IIS*/.NET;
 - Web server:** as bundled with application server;
 - Portal server:** Oracle Portal;
 - Content mgt server:** Broadvision 7.x;
 - Search server:** Verity Ultraseek 5.x.
 - **Software Engineering:**
 - IDE (major Web apps)** - J-Developer; Oracle Development Suite;
 - IDE (minor Web apps)** - Major apps IDEs + Visual Studio .NET;
 - IDE (business intelligence apps)** - Business Objects Designer; Oracle Discoverer Admin Edition;
 - **Software configuration mgt:** PVCS; ClearCase; Visual Source Safe.

- **Enterprise Architecture Tools & Standards:**
 - EA Modeling Tools:** Popkin System Architect (SA) 10.1, DAT ComponentX (Cx) 2.1, Sparx Systems EA 4.5 (UML 2).
- **EA Configuration Management Tools:** Eclipse/core.gov (CVS), Infrastructure Services Platform (ISP)
 - EA Repository:** core.gov
- **ADM Toolset:** BeCubic
- **Database Management Systems -** MySQL; Oracle; MS SQL Server; Netweaver; Notes Domino; Sybase; DMSII
- **Desktop:** MS Access
- **Storage Management –** Server Area Networks (SAN); Network Attached Storage (NAS); Direct Attached Storage (DAS); Tiered Storage
 - Data Warehousing:** DBMS(See DBMS standard)
 - Extract, Transformation, Load (ETL) tool:** Informatica Power Center 6.0, SAP, ADT
 - Metadata Management:** Informatica, ADT EME
 - Data Modeling:** System Architect, AllFusion Data Modeling Suite (previously known as Erwin)
- **Digital Document Technology - Documentum;** Adobe Acrobat / Element server, Lotus Notes (.nsf); Internet Quorum (Correspondence Tracking), Laserfiche
- **Server Hardware – x86:** Direction as dictated by the GSA Hardware BPA (<http://hwbpa.gsa.gov>)
- **Application/Data Server Operating Systems –** Unisys MCP; Windows 2003 Server minus ADAM and Application Partitions; IBM AIX; Linux; Sun Solaris
- **Wide Area Network Topology –** Fractional T1 up to OC48; Frame Relay; ATM; IP
- **Wide Area Network Hardware -** Cisco MGX8850 Switch
- **Structured Cabling/LAN Topology –**
 - Wiring:** Cat 6; Multimode Fiber;
 - DataLink:** Ethernet 10/100 Base T; 100Mb switched to desktop Ethernet 100 Base T; Gig uplinks in Wire Closet, 10/100 to the Ports; 10Gb between Core, GB Servers
 - Protocol:** TCP/IP
- **Wireless LAN:** 802.11b/g with VPN (required), 802.11a with VPN (optional)
- **Enterprise-Wide Resource Management:**
 - Help Desk:** Support Magic, Remedy, Unicenter AHD
 - Push:** SMS, OnDemand Wininstall, Unicenter SDO
 - Remote Control:** SMS, Proxy, Unicenter RCO, PC Telecommute (server management)
 - Asset Management:** Support Magic, SMS, Computrace, Unicenter AMO, Dell Open Manage Client
 - Personal Productivity –** Microsoft Office 2003, MS Project 2003; Visio 2003
- **Desktop Utilities:**
 - Misc:** Enterprise Real Player; Win Zip 9.0; Windows Media Player; FileZilla

Handheld Synchronization: Palm Pilot (Palm Desktop, EasySync, Intellisync); Windows CE (ActiveSync); Blackberry (Blackberry Desktop Software, WIC); Lotus EasySync

Document Viewer: AutoCad VoloViewer, Visio Viewer 2003, Adobe Acrobat Reader 6.x; MS Project Viewer

- **4.1.3 Component Frameworks**
 - **Static display:** HTML
 - **Content rendering:** XHTML; CSS
 - **Dynamic/server-side display (portal apps):** Java Portlet Specification
 - **Business logic (major apps):** Java/J2EE; JavaScript; Oracle OC4J, Oracle ADF;
 - **Business logic (minor apps):** major apps business logic + .NET Framework; C#; VB.NET; VB Script
 - **Business logic (workflow apps):** Oracle Workflow, OW4J
 - **Business logic (business intelligence apps):** Business Objects SDK; Oracle Discoverer Portlet SDK
 - **Business logic (low-level, specialized):** C++
 - **Database connectivity:** JDBC; native SQL APIs; Open A JDBC/ODBC; DQ Broker
 - **Reporting and analysis:** Analog 5.x; Webtrends 6.x
 - **Business Intelligence Tools** – Oracle Discoverer Tools; Business Objects; URSA (for Unisys ClearPath); Crystal Reports; PilotWorks

- **4.1.4 Service Interface and Integration**
 - **Middleware, web services stack:** native app server web services stacks
 - **EAI:** Oracle Integration
 - **Message-oriented middleware:** Java Message Service; Oracle AQ
 - **Data format / classification:** XML
 - **Data types / validation:** XML Schema
 - **Data transformation:** XSLT
 - **Service discovery:** UDDI (ebXML RIM, WSIL)
 - **Service description / interface:** WSDL
 - **App to App Protocol:** SOAP (WS-I Basic Profile)

- **4.1.5 Service Components**
 - **Customer Relationship Management – Actuate e.reporting;** Firstlogic; Fulcrum; Visual Mining; Customer Profile System (CPS)

5. PLACE AND PERIOD OF PERFORMANCE

5.1 The Contractor shall perform Section 508 compliance testing, validation, verification and/or training at the GSA's National Headquarters and/or at any one of the GSA's eleven regional offices or field office locations, unless otherwise specified in the Scope of Work for each Task Order. The GSA's Headquarters and regional office locations and territories are listed below.

DRAFT BPA for Accessibility/508 Services

GSA National Headquarters – General Services Administration Federal Building, 1800 & F Streets, N.W., Washington, DC 20405. (Territories served: greater metropolitan Washington, D.C.)

New England Region, Thomas P. O’Neill Jr. Federal Building, 10 Causeway Street, Boston, MA 02222. (Territories served: CT, MA, ME, NH, RI and VT)

Northeast and Caribbean Region, Jacob K. Javits Federal Building, 26 Federal Plaza, New York, NY 10278. (Territories served: NY, NJ, PR, and VI)

Mid-Atlantic Region, The Strawbridge Building, 20 North Eighth Street, Philadelphia, PA 19107. (Territories served: DE, MD, PA, VA and WV)

Southeast Sunbelt Region, M.L. King Jr. Federal Building, 77 Forsyth Street, Atlanta, GA 30303. (Territories served: AL, FL, GA, KY, MS, NC, SC, and TN)

Great Lakes Region, John C. Kluczynski Federal Building, 230 S. Dearborn Street, Chicago, IL 60604. (Territories served: IL, IN, MI, MN, WI, and OH)

Heartland Region, Federal Center, 1500 East Bannister Road, Kansas City, MO 64131. (Territories served: IA, KS, MO and NE)

Greater Southwest Region, Fritz G. Lanham Federal Building, 819 Taylor Street, Fort Worth, TX 76102. (Territories served: AR, LA, NM, OK and TX)

Rocky Mountain Region, Denver Federal Center, Building 41, Denver, CO 80225. (Territories served: CO, MT, ND, SD, UT and WY)

Pacific Rim Region, Phillip Burton Federal Building and Courthouse, 450 Golden Gate Avenue, San Francisco, CA 94102. (Territories served: AS, AZ, CA, FE, GU, HI and NV)

Northwest Artic Region, Administration Building, 400 15th St. S.W., Auburn, WA 98001. (Territories served: AK, ID, OR and WA)

5.2 The period of performance for this BPA will remain in effect from the date of award through the term of the Schedule holder contract or one year, whichever is shorter. Thereafter, the BPA may be extended annually consistent with any extensions/renewals of the GSA FAS Schedule contract period for up to four additional years, for a total period of performance of five years.

The Government may extend the term of the BPA by written notice to the Contractor no later than the commencement date of the option period of performance; provided that the Government shall give the Contractor a preliminary written notice of its intent to extend at least 30 days before the BPA expires. The preliminary notice does not commit the Government to the extension.

If the Government exercises this option, the extended BPA shall be considered to include this option provision. Before processing any extensions, the Government shall review the BPA annually to determine if it is still considered a best value and still meets the Government’s needs.

The total duration of this BPA, including the exercise of option periods shall not exceed the GSA FAS schedule contract period of performance, and any subsequent extensions/renewals or five (5) years whichever is shorter.

6. SUMMARY OF CONTRACT CHARACTERISTICS

The intended use of this BPA is to provide the GSA with agency-wide support and services for **requirements and design specification**; testing, validation and verification of compliance; and remediation actions in accordance Section 508 technical standards and requirements. During the term of the BPA it is possible that customer requirements for individual Task Orders will necessitate the inclusion of provisions or clauses that are unknown at the time of award of the BPA. In these situations, it is understood that these provisions or clauses will be included in the BPA via Contract Modification, or in the solicitation and subsequent Task Order award. The Contractor may choose not to submit a proposal in response to a solicitation (with no negative affect on its past performance standing) for a potential Task Order, if these added provisions or clauses are unacceptable to them.

Task Orders may be placed on a fixed-price (FP), or time and materials (T&M) basis depending on the nature of the requirement.

7. DELIVERABLES

The Contractor when required shall provide comprehensive documentation in various media formats, which will consist of the Contractor's findings, conclusions and remediation plan; description of accessibility and compliance testing methods/techniques used, and list all testing and compliance tools and assistive technology tools used to test, validate and verify accessibility and compliance. Deliverable type (e.g. report), frequency of distribution and distribution instructions will be established in the Scope of Work for each Task Order.

8. TASK ORDER PHASE IN/PHASE OUT

The Contractor may be required to perform Phase-In and/or Phase-Out services as stated below, to insure continuity of services. Specific requirements for Phase-in/Phase-Out services will be established in the Scope of Work for each Task Order.

9.1 Phase-In:

This includes, but is not limited to the receipt of the project plans, design and requirement analysis documentation, quality assurance documentation, and existing software applications and programming codes. The Contractor shall propose a transition timeline and process for any phase-in activities as required.

The Contractor shall use the time between award of and the start date of this BPS (typically 30 calendar days, but can be less) to prepare for and achieve fully operational status on the first day of required services. To accomplish this level of operational readiness, the Contractor shall implement its proposed phase-in plan, which should be submitted as part of the technical proposal in response to the solicitation of this BPA and

Task Order requests. Site access shall be permitted during phase-in to the extent it does not interfere with the operation of the incumbent contractor if applicable. The Contractor shall coordinate with the Task Order Project Manager or GSA COTR for site access permission. The phase-in plan shall address no less than the following:

- manpower requirements
- transition of products and services from incumbent contractor
- personnel orientation
- site familiarization
- assumption of responsibility and accountability of government furnished property
- timelines

9.2 Phase-Out:

The Contractor shall maintain full contract compliance during the period of time leading up to completion or termination of this BPA or each Task Order. The Contractor shall submit to the GSA COTR or Task Order Project Manager, a phase-out plan (typically 60 calendar days, but can be less) before completion or termination of this BPA or each Task Order request. The phase-out plan shall address not less than the following:

- remediation plan to maintain required contract services
- training of incoming contractor personnel or GSA personnel on processes and procedures as specified by the contract
- procedures and responsibilities for performing physical inventory and reconciliation of Government Furnished Property.

The Contractor shall coordinate its phase-out activities with the incoming contractor, Task Order Project Manager or the GSA COTR to effect a smooth and orderly transition at the end of the contract period. The Contractor shall remove all contractor-owned property from the Government spaces or facilities by close of business on the last day upon completion of each Task Order request.

10. GOVERNMENT POINTS OF CONTACT

Contracting Officer:
Ms. Lydia Dawson,
Central Office Contracting Division,
1800 and F Streets, N.W., Room 3229
Washington, D.C. 20405

Contracting Officer's Representative
Contracting Officer's Technical Representative:
Ms. Brie Sansotta?

11. GOVERNMENT FURNISHED MATERIAL, PROPERTY AND INFORMATION

The Government will provide to the Contractor all Government owned equipment, materials and information necessary to meet the requirements specified in the Scope of Work for each Task Order. At a minimum, the Government shall furnish:

- all applicable licenses for Government owned software and hardware.
- facilities support (e.g. work spaces, conference rooms, training rooms, supplies, materials, equipment, etc.).
- access to Government owned IT infrastructures/networks (upon suitability security clearance and/or adjudication). **See Section 12 “Security” for additional information on security clearance requirements.**

Upon completion of each Task Order, the Contractor shall adhere to the disposition instructions as provided to the Contractor by the GSA. Appropriate disposition of Government property is a prerequisite for Task Order closeout. Improper disposition of Government property may result in the delay or withholding of Contractor payments, and/or other remedies available to the Government.

12. SECURITY

Task Order requirements for this BPA may involve the contractor to gain access to secure networks, facilities, and sensitive information. Therefore, the Contractor shall reference and follow the applicable security laws and regulations as specified in the BPS and/or as stated in each Task Order. To comply with GSA Order, CIO 2100.1D, contractors who design, operate, test, maintain, and/or monitor GSA systems must have as a *minimum*, the National Agencies Check with Inquiries Credit (NACI) investigation as specified below.

- **Requirements Resulting From Implementation of Homeland Security Presidential Directive HSPD-12:**

The Contractor shall submit the necessary paperwork to conduct a National Agency Check with Inquiries (NACI) background investigation for each employee prior to performing work on a Task Order. Contractor employees will not be granted access to any GSA facility, or to any GSA IT system prior to a favorable response to the fingerprint portion of this background investigation. An individual contractor employee’s failure to return satisfactory results from the background investigation will result in immediate removal of that employee.

- **Federal Acquisition Regulation (FAR) language to be included:**

Personal Identity Verification of Contractor Personnel:

(a) The Contractor shall comply with agency personal identity verification procedures identified in this BPA that implement Homeland Security Presidential Directive 12 (HSPD-12), Office of Management and Budget (OMB) guidance M-05-24, and Federal Information Processing Standards Publication (FIPS PUB) Number 201.

(b) The Contractor shall insert the above clause in all subcontracts when subcontractor employees are required to have physical access to any GSA facility or to any GSA IT system.

12.1 Laws and Regulations

The Contractor shall certify in writing, that applications purchased and/or developed for use in support of Section 508 compliance testing, validation, verification and/or training, are fully functional and operate correctly as intended on systems using the Federal Desktop Core Configuration (FDCC). This includes Internet Explorer 7 configured to operate on Windows XP and Vista (in Protected Mode on Vista). For the Windows XP settings, see: http://csrc.nist.gov/itsec/guidance_WinXP.html, and for the Windows Vista settings, see: http://csrc.nist.gov/itsec/guidance_vista.html

The standard installation, operation, maintenance, update, and/or patching of software by purchased and/or developed by the Contractor shall not alter the configuration settings from the approved FDCC configuration. The information technology should also use the Windows Installer Service for installation to the default "program files" directory and should be able to silently install and uninstall.

Applications designed for normal end users shall run in the standard user context without elevated system administration privileges.

The Contractor shall reference and comply with the following statutes and regulations regarding Information Technology Security:

- Clinger-Cohen Act of 1996 (Public Law (P.L.) 104-106), dated June 1997
- Computer Security Act of 1987 (P.L. 100-235)
- "Federal Information Security Management Act" (HR 2458, Title III)
- GAO Federal Information System Controls Audit Manual (FISCAM), June 2001
- GSA Acquisition Letter V 05-01, Implementation of Earned Value Management System (EVMS) Policy in GSA
- GSA CIO IT Security 01-01 Procedural Guide: Password Generation and Protection, June 2005
- GSA CIO IT Security 01-02 Security Incident Handling Guide, February 2001
- GSA CIO IT Security 01-03 Procedural Guide: Conducting Risk Assessments, (Revision 1) February 2005
- GSA CIO IT Security 01-04 Procedural Guide: Security Assessment, February 2005
- GSA CIO IT Security 01-05 Procedural Guide: Developing a Configuration Management (CM) Plan, September 2005
- GSA CIO IT Security 01-07 Procedural Guide: Access Control, June 2005
- GSA CIO IT Security 01-08 Procedural Guide: Auditing and Monitoring, June 2005
- GSA CIO IT Security 01-09 Procedural Guide: Certification and Accreditation (C&A), February 2005
- GSA CIO IT Security 02-20 Sun Solaris Server Hardening Guide Package
- GSA CIO IT Security 03-22 Windows XP Pro Hardening Guide
- GSA Order ADM P 9732.1C, Suitability and Personnel Security

- GSA Order CIO Handbook (HB) 2100.1C, GSA Information Technology (IT) Security Policy, February 17, 2006
- GSA Order CIO 2104.1, GSA IT General Rules of Behavior, July 2003
- GSA Order CIO 2105.1, GSA Wireless Local Area Network (LAN) Security, August 2002
- GSA PBS CIO Security Notice 003, Security Plans for Information Technology Systems
- GSA PBS CIO System Security Certification and Accreditation (C&A) Handbook
- National Institute of Standards and Technology (NIST) Federal Information Processing Standard (FIPS) 199, Standards for Security Categorization of Federal Information and Information Systems, February 2004,
- NIST Special Publication (SP) 800-18, Guide for Developing Security Plans for Information Technology Systems, December 1998
- NIST SP 800-30 Risk Management Guide for Information Technology Systems, July 2002
- NIST SP 800-37 Guide for the Security Certification and Accreditation of Federal Information Systems, May 2004
- NIST SP 800-47 Security Guide for Interconnecting Information Technology Systems, August 2002
- NIST SP 800-59 Guideline for Identifying an Information System as a National Security System, August 2003
- NIST SP 800-61 Computer Security Incident Handling Guide, January 2004
- NIST SP 800-64, Security Considerations in the Information System Development Life Cycle, Revision 1, June 2004
- NIST 800-65, Integrating IT Security into the Capital Planning and Investment Control Process, January 2005
- Office of Management and Budget (OMB) Circular A-123, “Management Accountability and Control”, June 21, 1995
- OMB Circular A-127, “Financial Management Systems”, July 23, 1993 with transmittal memo #2
- OMB Circular A-130, Management of Federal Information Resources
- OMB Memorandum for Chief Information Officers, Improving Information Technology (IT) Project Planning and Execution, August 2005
- Paperwork Reduction Act of 1995
- Privacy Act of 1974 (5 U.S.C § 522a)

12.2 Standards

The Contractor shall reference and comply with the following standards regarding requirements and design specification, and usability testing:

- NISTIR 7432, National Institute of Standards and Technology Common Industry Specification for Usability – Requirements, June 2007
- ISO/IEC 25062:2006, Software Engineering – Software product Quality Requirements and Evaluation (SQuaRE) – Common Industry Format (CIF) for Usability Test Reports, March 2006

12.2 DATA SECURITY AND PRIVACY

Contractor employees may have access to privileged and/or confidential materials of the United States Government. These printed and electronic documents are for internal use only, and remain the sole property of the United States Government. Some of these materials are protected by the Privacy Act of 1974 (AMENDED) and Title 58. Unauthorized disclosure of Privacy Act or Title 38 covered materials is a criminal offense. Each contractor employee will be given access to only the information and facilities needed to perform the responsibilities associated with a Task Order.

12.3 FACILITIES SECURITY

Contractor employees working at a Government facility may be required to display on their person, a Government-provided identification badge that will include the full legal name of the contractor employee(s). It is the responsibility of the Contractor to request and obtain badges from the Government prior to the first workday of any contractor employee. The Contractor shall return all badges to the Government on the same day that an individual employee is terminated, and/or upon termination or completion of the Task Order. The Contractor shall notify the Government immediately of any lost or stolen badges.

The hours that contractor employees will have access to a Government facility to perform work will be based on an 8-hour workday or 40 hour workweek, including Federal Holidays, unless otherwise specified in the Scope of Work for each Task Order. Contractor employees working at a Government facility shall comply with all policies and directives of that work site. This may require contractor employees to attend facility orientations and briefings as necessary.

12.4 SYSTEM SECURITY

The Contractor shall adhere to the security laws and regulations as specified in this BPA under Section 12.1 “Laws and Regulations” and/or those laws and regulations specified in the Scope of Work for each Task Order. Additional system security requirements may include security safeguard reviews, system audits, reporting suspected security violations, acting to secure system environments, responding to computer security alerts and any other review or actions required to ensure computer systems are not violated or vulnerable.

13. SECTION 508 COMPLIANCE

The Contractor shall comply with all required Federal or agency standards as specified in the scope of Work for each Task Order. Specific Section 508 standards and requirements will also be stated in each Task Order. Section 508, the Federal Information Technology Accessibility Initiative (36 CFR 1194), is incorporated into and made a part of this BPA. Compliance with the applicable Section 508 standards is a material requirement of the BPA. Complete information on Section 508 standards and how to administer Section 508 requirements can be found at <http://www.section508.gov>.

14. PERSONNEL REQUIREMENTS

The Contractor shall provide skilled personnel together with supervisory, managerial and administrative services necessary to successfully meet the requirements of each Task Order. Personnel assigned by the Contractor to perform work assignments on Task Orders shall be acceptable to the GSA in terms of personal and professional conduct, and technical expertise.

The Contractor shall notify the GSA Contracting Officer in writing, of any proposed substitutions in personnel prior to, and/or during work assignments on a Task Order at least fifteen (15) calendar days in advance of the proposed substitution. Proposed substitute personnel qualifications and skills shall be equal to, or greater than those of the personnel being replaced, and will result in no increase in Task Order price.

Should the assignment of any person in the Contractor's organization create a conflict with the interests of the Government, the GSA Contracting Officer will notify the Contractor in writing, and request the person's removal from the assignment and replacement as necessary.

Employment and staffing difficulties will not be justification for failure to meet Task Order requirements, schedules and deliverables.

15. TRAVEL

Travel requirements specified in the Scope of Work for each Task Order must be authorized in writing by the GSA Contracting Officer or his/her appointed designee. The Contractor will incur all travel cost associated with the requirements of the Task Order, unless otherwise specified in the Scope of Work for each Task Order, and in accordance with the Federal Acquisition Regulations (FAR) 31.205.46.

16. INSPECTION AND ACCEPTANCE

All Task Order deliverables, when required, shall be submitted by the Contractor to the Task Order Project Manager or the GSA COTR for inspection and acceptance within fifteen (15) calendar days of Task Order completion.

Unless otherwise specified in the Scope of Work for each Task Order, the Task Order Project Manager or GSA COTR will meet with the Contractor on a monthly basis to review performance, that is to inspect work for compliance with the Task Order Scope of Work, BPA requirements and/or with all modifications thereto. Reviews will normally be held at a GSA facility, or site location(s) specified in each Task Order.

17. QUALITY ASSURANCE AND PERFORMANCE REQUIREMENTS

The Contractor's performance will be monitored by the GSA Contracting Officer or his/her appointed designee to ensure quality assurance. The GSA reserves the right to review services to be provided, including those developed or performed at the Contractor's facilities, to determine conformance with performance and technical requirements.

17.1.1 QUALITY CONTROL

This BPA requires the Contractor to maintain a thorough quality control program with the aim of identifying and correcting deficiencies in the quality of services before performance becomes unacceptable.

As part of the Quality Control Program, the Contractor shall develop a Quality Control Plan (QCP) that describes the Contractor's procedures for monitoring performance. At a minimum, the Quality Control Plan shall include the following:

- a description of the inspection system to cover all services specified in the Scope of Work for each Task Order. The description shall include specifics as to the areas to be inspected on both a scheduled and unscheduled basis, and frequency of these inspections.
- a description of follow-up procedures to ensure that deficiencies are corrected, and the time frames involved in correcting these deficiencies.
- a description of the records to be kept to document inspections and corrective or preventive actions taken.

Records of inspections shall be kept by the Contractor and made available to the GSA's Contracting Officer or his/her appointed designee when requested. Records of inspection can be requested by the GSA Contracting Officer or his/her appointed designee for the performance period of a Task Order, and/or through Task Order completion until final settlement of any claims under this BPA are remedied.

The GSA Contracting Officer will notify the Contractor in writing, of any deficiencies in the QCP, and will allow five (5) working days for revision to be submitted.

18. ADMINISTRATIVE

18.1 GSA Electronic Invoicing

All invoicing, billing and payment associated with this BPA will be done electronically. Password and electronic invoice access may be obtained through the GSA's web site <http://www.finance.gsa.gov>.

The GSA's Contracting Officer or his/her appointed designee shall review and certify the Contractor's invoice submitted for payment. The Contractor may invoice only for the hours, travel, and/or unique services rendered in each individual Task Order. The GSA Contracting Officer must complete a Standard Form 300, "Receiving Report" accepting the covered services to ensure prompt and accurate payment to the Contractor.

Failure to comply with the procedures stated above may result in delay of payment to the Contractor.

18.2 Personal Services

The services to be acquired under this contract are "non-personal as defined by FAR 37.101. As such, the Contractor personnel rendering services are not subject either by the

contract's terms or by the manner of its administration. Although Contractor employees may be working under the technical direction and surveillance of Government personnel, the GSA will not supervise or manage Contractor personnel, nor participate in supervisory or management decisions regarding contracting employees.

18.3 Privacy Act

Work on this project may require personnel to have access to Privacy Information. Personnel shall adhere to the Privacy Act, Title 5 of the U.S. Code, Section 552a and applicable agency rules and regulations.

18.4 Protection of Information

The Contractor shall be responsible for properly protecting all information used, gathered, or developed as a result of work under the contract. In addition, the Contractor shall protect all government data, equipment, etc by treating the information as sensitive.

Sensitive but unclassified information, data, and/or equipment will only be disclosed to authorized personnel as specified in the Scope of Work for each Task Order. The Contractor shall ensure that appropriate administrative, technical, and physical safeguards are established to ensure the security and confidentiality of this information, data, and/or equipment is properly protected. When no longer required, this information, data and/or equipment shall be returned to Government control; destroyed; or held until otherwise directed. Items returned to the Government shall be hand carried or mailed to Task Order Project Manager. The Contractor shall destroy unneeded items by burning, shredding or any other method that precludes the reconstruction of the material.

18.5 Cancellation of Orders

The GSA's Contracting Officer has the right to cancel Task Orders if the requirement is eliminated, changed or is no longer needed. The GSA's Contracting Officer shall notify the Contractor in writing thirty (30) calendar days prior to the stop work date.

18.6 Unauthorized Commitment

The terms and conditions of the BPA or Task Order can only be authorized for modifications by the GSA Contracting Officer.

19. PROPOSAL SUBMISSION

The Contractor must submit a Technical Proposal to the GSA Contracting officer, in response to the solicitation of this BPA, as well as to each Task Order request. The Technical Proposals submitted by the Contractor and/or its subcontractor must contain at A minimum the elements listed below.

19.1 Proposal Submission – BPA

19.2 Proposal Submission – Task Orders

- comprehensive technical approach to perform the requirements established in individual Task Order request,
- staffing plan (including Contractor personnel’s qualifications, and skills),
- pricing (breakdown of all actual and estimated costs to perform the requirements established in individual Task Order.

20. TECHNICAL EVALUATION FACTORS AND EVALUATION METHODOLOGY

Proposals will be evaluated in terms of quality, depth and relevance of information presented in response to the Task Order Scope of Work.

20.1 Technical Factor One: Technical Capability and Understanding of Requirements

- Basis of Evaluation: Offers will be evaluated to determine the soundness of the technical approach most suitable to this effort and the ability to deliver within the required timeframes.

20.2 Technical Factor Two: Professional Staff

- Basis of Evaluation: The resumes submitted by the Contractor will be evaluated to assess the availability and qualifications of the proposed staff, their experience in similar projects and their capability to fully and professionally accomplish the objectives stated herein. All personnel proposed must work on this task order as proposed. The successful Contractor will maintain the level of expertise covered in the proposed staffing plan stated in the offer, for the duration of the Task Order

20.3 Price Evaluation Factors and Evaluation Methodology

- The Contractor’s aggregate price for all work established in Task Order will be evaluated, including that of any discounts offered by the Contractor from their existing GSA Schedule pricing list, if applicable. The contract award type for all Task Orders is firm fixed price.

21. BEST VALUE EVALUATION METHODOLOGY

Best value evaluation is, in and of itself, a subjective assessment by the GSA’s Contracting Office or his/her appointed designee, of the proposed solution that provides the optimal results to the GSA, price and other factors considered. Subjectivity is inherent in the process and is the cornerstone of the source selection decision. In an effort to provide insight to the Contractor as to

the decision making process of the GSA's Contracting Officer, the information below is provided:

- Evaluation will be made on two factors – Technical and Price. In the evaluation, technical is significantly more important than price. While price is not as important as Technical, it does have significance to the GSA.
- In rating the technical proposals, the three factors (Technical Capability and Understanding the Requirements, and Professional Staff) are in order of importance.
- Technical Capability and Understanding the Requirements is significantly more important than Professional Staff.
- The Government will perform a price/technical trade-off analysis in accordance with the above methodology and select the offer that provides the best value.

22. METHOD OF AWARD

Award will be based on the best value to the GSA, price and other factors considered.