



## **Sample Task Order**

### **US Department of Education**

### **Student Financial Assistance (SFA)**

### **SLC/IPT Process**

### **Task Order**

#### **Overview**

The Student Financial Assistance (SFA) organization has been working with the Modernization Partner to provide SFA with a comprehensive SLC methodology for use by Integrated Product Teams (IPT). An IPT is defined as a multidisciplinary team leveraging different skills and competencies to address a business problem. The IPT process was identified as a framework for the teams to use in defining a business problem and developing its solution. It is based on the systems development life cycle but can be applied to any business situation.

The requirements and deliverables outlined in this proposal will complement work currently underway within the SFA organization. In 2nd quarter of FY 2000, the Modernization Partner was tasked to develop an IPT Process that was based on their Business Integration Methodology (BIM) of Andersen Consulting. It consisted of the SLC life cycle phases and associated templates for its use. Several IPT's began to use the IPT Process. Feedback from its use and management reviews have indicated a need to expand the IPT process based on the SLC.

The purpose of this task order is to provide SFA with an updated IPT process based on the SLC methodology. The IPT process should consist of an updated set of roles and accompany training material for use by IPTs. The SLC/IPT processes will describe the use of templates, deliverable outcomes, signoff controls, roles and responsibilities within each phase.

The objectives of this task are to:

1. Update the existing IPT process.
2. Develop a Deployment Plan.
3. Develop Training Material for the SLC/IPT process.



***Sample Task Order***

---

The Modernization Partner will review the existing SFA Program Management Methodology. The Modernization Partner will then work with SFA to streamline this methodology, customized for the SFA environment, for the deployment of this Program Methodology to their project teams. SFA's SLC and current IPT process will be provided as input for this task order.

*Scope*

This task order will begin September 18, 2000. The work will be performed on Firm Fixed Price basis and payment will be deliverable-based. Deliverables will be invoiced upon completion and according to the Price Summary page in the enclosed Cost Proposal. The project scope will include providing functional resources to support the planning effort within the CIO.

Close coordination between the CIO, the Modernization Partner, and the Project Management Office (PMO) will be required.

*Work Effort*

Work effort will be coordinated through the SFA Deputy CIO (eCAD) or designated representatives to review and approve key work products/deliverables.

The work associated with this task order is comprised of the following key components:

- A. Planning** –Document key tasks and schedule that need to be accomplished in order to successfully complete the above objectives. This will include the definition of milestones for each stage of this task.
- B. Update IPT Process** - The scope of this initiative is to update the existing IPT process. It will describe the templates, deliverable outcomes, signoff controls, roles and responsibilities within each phase.
- C. Deployment** - Develop a strategy for deploying migrating the SLC/IPT Process within the SFA organization. Specifically, develop and implement a detail plan for deploying and supporting the teams through orientation and training. This includes developing the curriculum for the orientation training.



*Deliverables*

The deliverables will include a Work Plan, Updated IPT Process, Deployment Plan and Training Materials. Descriptions and timeframes for these deliverables are summarized below:

**2.4.1 Project Work Plan** – a plan that identifies the tasks, schedule and milestones. It will include start and finish dates and deliverables, and other resource requirements if any. The resources will include Modernization Partner and Government staff. The Project Work Plan will describe the scope of the project, participants and their roles and regularly scheduled working sessions and status meetings. GFE to be utilized during this project will also be noted and their purpose described.

*Desired Level of Performance* – The work plan will outline the tasks, schedule and milestones.

*Quality Level* – One document delivered on-time and approved by the SFA Deputy CIO (eCAD) or representative.

*Delivery* – Two (2) Weeks after Contract Start Date

**2.4.2 SLC/IPT Process** – consisting of an updated IPT Process based on SFA’s SLC. It will consist of an outline and the SLC/IPT Process and associated templates. Roles and responsibilities of participants, applicable entry and exit criteria and additional reference material. The Process Guidebook will provide pragmatic guidelines for project managers to utilize during the IPT process. Based on the SLC, the Process Guidebook will include information on the Methodology, Process, Technology and Tools. The tools will include both SFA COTS standards as well as templates for the application of processes.

*Desired Level of Performance* – The deliverable will consist of an annotated outline, draft and final versions of the SLC and associated templates that are all in electronic format for on-line viewing and updating.

*Quality Level* – One document delivered on-time and approved by the SFA Deputy CIO (eCAD) or representative.



**Sample Task Order**

---

Delivery – Nine (9) Weeks After Contract Start Date

**2.4.3 Deployment Plan** – which details the approach for deploying the SLC/IPT Process. It will consist of a draft and a final version. The plan will address multiple areas including training/deployment content (see next sub section), alternatives for deployment, target audiences and communication of content and infrastructure requirements for management and governance (i.e., compliance).

Desired Level of Performance – The deliverable will consist of the updated IPT process based on the SLC.

Quality Level – One document delivered on-time and approved by the SFA Deputy CIO (eCAD) or representative.

Delivery – Two (2) Weeks After IPT Process (2.4.2)

**2.4.4 SLC/IPT Process Training Content** –This deliverable is the overview training content for different types of SFA audiences (as defined in the sub section above). The training content will includes handouts for students and presentation instructions.

Desired Level of Performance – The deliverable will consist of an outline and the SLC Orientation Training Content.

Quality Level – One document delivered on-time and approved by the SFA Deputy CIO (eCAD) or representative.

Delivery – Four (4) Weeks After Deployment Plan (2.4.3)

**Deliverables, Acceptance Criteria and Milestones**

<b>Deliverable Number</b>	<b>Deliverable</b>	<b>Acceptance Criteria</b>	<b>Due</b>
1.	Project Work Plan	This deliverable outlines a schedule for the tasks to be completed.	10/02/2000



**Sample Task Order**

<b>Deliverable Number</b>	<b>Deliverable</b>	<b>Acceptance Criteria</b>	<b>Due</b>
2.	SLC/IPT Process	The deliverable will consist of an outline and the SLC/IPT process and associated templates.	11/20/2000
3.	Deployment Plan	Deployment Plan which details the approach for deploying the SLC/IPT Process.	12/04/2000
4.	SLC Training Content	This deliverable is the overview training content for various SFA audiences. It includes handouts for students and presentation instructions. This deliverable will be provided in electronic format for on-line viewing and presentation.	12/29/2000

**Summary**

The work effort and deliverables outlined in this task order will complement work currently underway within the SFA organization. Specifically, this new work will be integrated with the existing efforts involved with the development of an Object Oriented software development methodology.

**Assumptions**

1. SFA shall have 14 days from receipt of each deliverable to review and provide comments or questions. If the deliverable substantially meets the acceptance criteria, then the deliverable shall be approved for payment. If the deliverable contains material errors or omissions, then we shall have 7 days to correct and re-submit the deliverable, and SFA shall have an additional 7 days to review the revised deliverable. We will promptly use commercially reasonable efforts to correct errors in each deliverable.
2. Travel is not anticipated for this task order.
3. The project team will coordinate with existing IPTs, eCAD, and the PMO in order to accomplish the objectives of this task order. These other resources will be obtained in to support activities laid out in this task order as needed.



***SLC Process Guide***  
***Appendix A – SLC Samples***

***Sample Task Order***

---

4. The US Government will be the sole owner of all materials created in electronic or paper form under this task.



***SLC Process Guide***  
***Appendix A – SLC Samples***

***Sample Task Order***

---