Workforce 3.0

Attachment 11: Task Order Document

Requirements

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Solicitation Number: HT003821R0001

Program Executive Office, Healthcare Management Systems (PEO DHMS)

1.0 DESIGN-TO-OUTCOME

The Design-To-Outcome Task Order (DTO) applies to Workforce 3.0 (WF3) contract Lot 1. DTO task orders are intended to be a construct that is mutually beneficial to both the Offeror and Government, allowing both sides to actively mitigate risks and reduce miscommunication throughout the delivery process. The following task order definitions are incorporated from Attachment 1, Scope and Ordering Guide:

Design-To-Outcome Task Orders

These Task Orders serve as observation, design, planning, and negotiation periods. They allow for preliminary work and cashflow to commence immediately, while providing the Offeror time to assess operations and prepare a detailed outcome-oriented approach for commencing and executing performance on the follow-on Core Task Order. The approach shall include agreed-upon performance metrics to measure performance on the Core Task Order and inform contract profit calculations. The initial Designto-Outcome Task Order allows for transition of PEO DHMS mid- and back-office functions to the contractor, and allows for a longer time period to accommodate the shift of functions and ensure no gap in coverage of operational activities. The remaining Design-to-Outcome Task Orders will be shorter as transition will have already occurred, unless the government deems the contractor has failed to meet metrics and decides to compete the next cycle of Task Orders. In such an event, Design-to-Outcome Task Orders may encompass subsequent transitions events.

Core Task Order (CTO)

These Task Orders may be issued as logical follow-ons, based on the terms agreed upon during the Design-to-Outcome Task Orders. The intent is to transition coverage of Workforce 3.0 core capabilities and operational activities to provide continuation of services for mid and back office functions. The Offeror will be expected to execute the organizational digital transformation in accordance with the performance metrics and outcomes agreed upon during Design-to-Outcome Task Order 1. In addition, Offerors will be expected to seek innovation opportunities while maintaining baseline capabilities.

 DTOs are the first task orders through the breach and provide a platform for the full badgeless, seamless team to work together on designing the digital transformation strategy, instead of relying on artificial approaches submitted in response to a solicitation with no hands on information. Offerors and Government can jointly strategize in the same room, achieve alignment, and work together to flesh out the plan for each year instead of setting designs in stone for the life of the contract. This enables the contract to evolve alongside PEO DHMS's business.

The DTO vision is an iterative approach that is mutually beneficial to both the Offeror and the Government. Traditional proposals are limited in their value during execution, as Offerors must delicately balance between detail and flexibility in their approach, while the government seeks to accurately evaluate an Offeror's approach, insisting on a degree of detail and commitment to mitigate its risk. Offerors avoid building in too much commitment and price plenty of risk into their approach. Neither party benefits from what amounts to an uninformed plan created with the limited structured communications governed by strict source selection procedures.

The Government designed the DTO to allow a more comprehensive planning period during a critical transition. During the IDIQ Contract source selection, the Government evaluates Lot 1 Offerors on their capability rather than a hypothetical approach/plan. This enables the Government to sufficiently qualify Offerors and ensure that the awardees are capable of achieving a successful digital transformation. Once awardees are selected, the primary Lot 1 awardee enters a joint planning period and works in tandem with the Government to form a plan for the upcoming year, all while concurrently developing and negotiating the associated Core Task Order. The single iterative DTO process will reuse outputs to serve two purposes, strategic decisions, and contracting documentation. The Government anticipates that the DTO will include discovery, workshopping, negotiation, transition, and other preparatory activities. The onus is on the primary awardee to bring its own DTO format and methodology in order to bring to bear its best practices on workshops, discovery, and metrics development.

One major output of the DTO will be the scope, approach, and task order documents for the CTO.

The first DTO period is anticipated to last for approximately 90 days, but ultimately will be condition and outcome-based.

1.1 Solicitation Requirements

If an Offeror is included in the competitive range for the IDIQ Contract competition, then it will be required to submit, as part of Interim Proposal Revisions, a complete Performance Work Statement (PWS), Contract Data Requirements List (CDRL) forms, Quality Assurance Surveillance Plan (QASP), and any other supporting Attachments aligned to the Offeror's specific DTO approach, which must comply with, but supplement, the following framework.

1.2 DTO Multi-Phase Iterative Framework

The Government recognizes the importance of bilateral dialog to achieve a successful discovery and discussion period. The Government will make a good-faith effort to make critical stakeholders available to participate during the DTO period(s). However, it is understood that there may be some resistance to participation in this effort for a number of reasons. The contractor must take ownership, influence the Government, and drive towards a successful discovery and design period. The Government is specifying the following key Phases with the applicable Decision Point(s). The contractor shall provide, in its proposed PWS, the format, methodology, event structure, entry/exit artifacts, and any other information necessary to successfully implement its unique DTO approach. The Government expects an iterative approach that may require sub-events or multiple feedback cycles for each step. If the contractor's approach requires delivery of an artifact in an earlier phase, the contractor may submit those artifacts in earlier phases.

Phase	Purpose	Due Date	Government Artifact Inputs*	Contractor Artifact Outputs*	Key Discussions/ Agreements*	Decision Point
Initial Delivery	Exchange existing written or static multimedia artifacts to begin discovery	3 days after contra ct award	See Paragraph 1.2.1	 Case Studies Vision documents Benefit Statements User Stories Test Cases approved 	• N/A	N/A
Discovery/ Kick Off	Introductions of key DTO stakeholders Identify data requirements for successful DTO and transition plan	**	 Personas Pain Points Objectives Risks Concerns 	Kick Off Meeting / Summit Detailed Plan to Complete Phase Exit Criteria	Information / exchanges necessary to complete phase Entry / Exit Criteria for next phase	Government Board of Director (BOD) submission of requested information
Direction Check	Agree on strategic/high-level concepts to support delivery of a full design Allow for limited ramp-up of personnel in preparation for transition	**	**	Outcomes Limited ramp-up staffing plan ROM Core Task Order Basis of Estimate Core Task Order Documents Rough Draft	Viability of conceptual strategy and initial feedback	BOD approval of concept
Design Approval	Agree on full Core Task Order strategy and approach Allow for full transition activities and scale up	**	**	Design Transition Plan Basis of Estimate Outcome Metrics Incentive Thresholds Incentive Levels Incentive Rewards Core Task Order 90% Draft Task Order Documents	Agreement on the strategy/ approach Transition POA&M	BOD approval of strategy
Completion	Award of core task order			Final contracting documents	Negotiated task order	Core Task Order Award

^{*}Notional list, contractor may supplement at its discretion to align to its unique approach.

^{**}Contractor to define based on individual approach strategies.

- 87 The Government will make the following artifacts available for review during the course of the DTO: 88 2018 Stakeholder Report Final Jan 2020.pdf 89 20200429 RAH DoD EHR SSG Final.pdf 90 Acq Plan and Strategy Guide PEO C4I 14 September 2007.doc 91 BCM for Delivery Task Orders Up To and Including SAT.docx 92 DHMS-PEO OPR Brief 16APR2019v0.23.pptx 93 DHMSM DMIX QPR 21OCT2019 v6 (002).pptx 94 DHMSM Factsheet 20191022 508C.pdf 95 DHMSM PCSManpowerUpdate Current IPT.PPTX 96 Draft Procurement User-Guide 0624019.docx 97 EID Platform ADM v4.docx • 98 EIDS Transfer Brief 2.14.2020 v.1.pptx 99 Final Support Agreement Training 17April20.pptx 100 IPO Org Chart IPT.PPTX JOMIS PCS ORG CHART Current IPT.PPTX 101 102 LTGPlace 202004 Final.pdf 103 • MHSGENESIS Factsheet 20190710 508C.pdf 104 • MHSGENESIS IOTANDE.pdf MOA between DHMS and DHA 30 Oct 2014.pdf 105 PEO DHMS 2017 Annual Report 508C.pdf 106 107 PEO DHMS Contracting Division DRAFT2Apr20 v2.pptx PEO DHMS OMS RFP IPT 24Jan2020 Final.pptx 108 PEO IPT's PCS Org Chart.pptx 109 PEO Transformation Information Sheet.pdf 110 111 PEO DHMS FY18 Annual Report.pdf PEO DHMS In Progress Support Agreements 14April 2020.pdf 112 PEODHMS Brochure 05202019 1251 Web 508C.PDF 113 114 PEODHMS Factsheet 20190715 508C.pdf 115 PEODHMS-Purpose-Goals-Strategies 02282020 1339.pdf Wave Travis Lessons Learned executive overview 11 2019.pptx 116 117 118 The Government will make every effort to make the following stakeholders available for interview and discussion during the course of the DTO: 119 120 PEO, Program Analyst, Project Lead 121 Chief of Staff DHMSM; Asst Program Manager 122 Assistant PM DHMSM • 123 PM DHMSM 124 DMIX PM 125 Deputy PM DHMSM 126 FEHRM Deputy Director CHENG for FEHRM 127 128 • **CHENG JOMIS** 129 Acquisitions JOMIS 130 PM JOMIS • Lead - Tech Transformation 131 132 Chief, Biz Ops Branch 133 Contracting Officer 134 **DHMS Chief Transformation Officer** Director Business Ops PEO DHMS 135 136 Procurement team lead; PEO
- Functional Deputy PEO

• Lead, Admin Facilities & Ops

Budget Execution Lead, Biz Ops

- Logistics/Program Analyst
 - CHENG PEO DHMS

2.0 INCUBATOR

The Incubator Task Order (ITO) applies to Workforce 3.0 (WF3) contract Lot 1. The ITO provides Offerors a mechanism to officially engage PEO DHMS and stay informed on the latest organizational posture. ITO play an important role in achieving mutually beneficial risk mitigation. The following task order definition is incorporated from Attachment 1, Scope and Ordering Guide:

Incubator Task Order

 These Task Orders are issued to advise on PEO DHMS innovation posture and capability gaps. They will be awarded to Lot 1 Awardees that are not currently awarded and executing on a Core Task Order. The intent is to for the contractor to perform independent surveys of the health technology domain and report on PEO DHMS strengths, opportunities, and blockers as it compares to best-in-class methodologies of health technology.

The Government views the ITO as a "warm failover" or "pilot light"; both concepts highlight that the intent of the PEO DHMS digital transformation is not to reset under a "cold start" in the event of a non-performant CTO Offeror. Meanwhile, the ITO gives Offerors a funded channel to stay engaged in the PEO DHMS enterprise journey and an official avenue to have discovery conversations. This further mitigates Offeror delivery risk by providing a continual stream of data for Offerors to act upon in the event of a DTO transition event.

Moreover, PEO DHMS achieves external perspectives on its digital transformation progress and areas of strengths, weaknesses, opportunities, and threats. This data may provide additional perspectives that may lead to modifications in or additions to the PEO DHMS strategy. Offerors are expected to bring their unique perspectives and insights to bear on the PEO DHMS landscape.

The ITO also provides positive cashflow to Offerors. The Government believes that an official client engagement provides substantially more valuable inputs and outputs (to both Offerors and Government). In contrast, an Offeror's Business Development efforts may only achieve limited or skewed insights into the organization. The ITO ensures that PEO DHMS incentivizes and maintains open channels to its most capable partners, even if those partnerships are not exercised at scale in the moment.

ITO activities shall depend on an Offeror's approach to performing strategic assessments. Broadly, the scope of outputs from an ITO is anchored around strategic insights ranging from:

- **Digital Adoption** Considerations on the efficiency and effectiveness of PEO DHMS digital tooling
- Horizon Scanning Utilizing research and data to inform PEO DHMS about future opportunities and threats
- **Customer Experience** Insights into customer and end user sentiments as they pertain to PEO DHMS portfolio products
- Market Positioning Competitive analysis into the posture of PEO DHMS with respect to both analogous commercial and Government counterparts

2.1 Solicitation Requirements

If an Offeror is included in the competitive range for the IDIQ Contract competition, then it will be required to submit, as part of Interim Proposal Revisions, a complete Performance Work Statement (PWS), Contract Data Requirements List (CDRL) forms, Quality Assurance Surveillance Plan (QASP), and any other supporting Attachments aligned to the Offeror's specific ITO approach, which must comply with, but supplement, the following framework.

2.2 ITO Iterative Framework

The Government recognizes the importance of bilateral dialog to achieve a successful discovery and assessment output. The Government is specifying the following key Phase Points with the applicable Decision Point(s). The contractor shall provide, in its proposed PWS, the format, methodology, event structure, entry/exit artifacts, and any

other information necessary to successfully implement its unique ITO approach. If the contractor's approach requires delivery of an artifact in an earlier phase, the contractor may submit those artifacts in earlier phases.

Phase	Purpose	Due Date	Government Artifact Inputs*	Contractor Artifact Outputs*	Key Discussions/ Agreements*	Decision Point
Direction Check	Agree on strategic/ high-level concepts to support delivery of a full design Allow for limited ramp-up of personnel in preparation for transition	**	**	Outcomes Staffing plan Assessment Methodologies	Viability of conceptual strategy and initial feedback	BOD approval of concept
Completion	Delivery of ITO outputs	60 days after ITO award		Digital Adoption Assessment Horizon Scanning Assessment Customer Experience Assessment Market Positioning Assessment	Walkthrough of major findings and assessment recommendations	BOD acceptance of outputs

^{*}Notional list, contractor may supplement at its discretion to align to its unique approach.

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2.2.1 Initial Government Delivery

The Government will make the following artifacts available for review during the course of the DTO:

- 2018 Stakeholder Report Final Jan 2020.pdf
- 20200429 RAH DoD EHR SSG Final.pdf
- Acq Plan and Strategy Guide PEO C4I 14 September 2007.doc
- BCM for Delivery Task Orders Up To and Including SAT.docx
- DHMS-PEO QPR Brief 16APR2019v0.23.pptx
- DHMSM DMIX QPR 21OCT2019 v6 (002).pptx
- DHMSM Factsheet 20191022 508C.pdf
- DHMSM PCSManpowerUpdate Current IPT.PPTX
- Draft Procurement User-Guide 0624019.docx
- EID Platform ADM v4.docx
- EIDS Transfer Brief 2.14.2020 v.1.pptx
 - Final Support Agreement Training 17April20.pptx
- IPO Org Chart IPT.PPTX
- JOMIS PCS ORG CHART Current IPT.PPTX
 - LTGPlace 202004 Final.pdf
 - MHSGENESIS Factsheet 20190710 508C.pdf
 - MHSGENESIS IOTANDE.pdf
- MOA between DHMS and DHA 30 Oct 2014.pdf
- PEO DHMS 2017 Annual Report 508C.pdf
- PEO DHMS Contracting Division DRAFT2Apr20 v2.pptx
- PEO DHMS OMS RFP IPT 24Jan2020 Final.pptx
- PEO IPT's PCS Org Chart.pptx
- PEO Transformation Information Sheet.pdf
- PEO DHMS FY18 Annual Report.pdf
- PEO DHMS In Progress Support Agreements 14April 2020.pdf
- PEODHMS Brochure 05202019 1251 Web 508C.PDF

^{**}Contractor to define based on individual approach strategies.

- PEODHMS_Factsheet_20190715_508C.pdf
 - PEODHMS-Purpose-Goals-Strategies 02282020 1339.pdf
 - Wave Travis Lessons Learned executive overview 11 2019.pptx

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- The Government will make every effort to make the following stakeholders available for interview and discussion during the course of the DTO:
 - PEO, Program Analyst, Project Lead
 - Chief of Staff DHMSM; Asst Program Manager
- Assistant PM DHMSM
 - PM DHMSM
 - DMIX PM
 - Deputy PM DHMSM
- FEHRM Deputy Director
- CHENG for FEHRM
 - CHENG JOMIS
 - Acquisitions JOMIS
 - PM JOMIS
- Lead Tech Transformation
 - Chief, Biz Ops Branch
- Contracting Officer
 - DHMS Chief Transformation Officer
- Director Business Ops PEO DHMS
- Procurement team lead; PEO
 - Budget Execution Lead, Biz Ops
 - Functional Deputy PEO
 - Lead, Admin Facilities & Ops
 - Logistics/Program Analyst
 - CHENG PEO DHMS

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3.0 ACCELERATOR

The Accelerator Task Order (AcTO) applies to Workforce 3.0 (WF3) contract Lot 2. The AcTO are intended to be a construct that is mutually beneficial to both the Offeror and Government, allowing both sides to actively mitigate risks and reduce miscommunication throughout the delivery process. The following task order definitions are incorporated from Attachment 1, Scope and Ordering Guide:

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Accelerator Task Orders

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These Task Orders are issued prior to Ad-Hoc Task Orders. The intent is to provide time to accurately scope and negotiate the terms for the Ad-Hoc Task Order when the need for an Ad-Hoc Task Order is identified. Accelerator Task Orders are linked to Ad-Hoc Task Orders, in that they allow work to begin immediately and will result in an agreed upon expectation for completion of the Ad-Hoc Task Order.

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Ad-Hoc Task Orders

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Task Orders issued to address specific needs, such as short-term projects, limited time access to unusually high subject matter experts, or for targeted studies and reports. These Task Orders will be issued on an asneeded basis and the period of performance will be determined and agreed upon during the Accelerator Task Order.

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The AcTO operate similarly to the DTO of Lot 1. Whereas DTOs are preparatory task orders for CTO, AcTOs are preparatory task orders for Ad-Hoc Task Orders (AHTO). CTOs are intended to be broad and expansive, covering the depth-and-breadth of PEO DHMS digital transformation requirements. AHTOs are intended to be targeted, focusing on a specific aspect and bringing specialized expertise to bear on a PEO DHMS transformation challenge. As such, the AcTO, as a pre-requisite for the Lot 2 targeted activities, also manifest in a more targeted manner.

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The Government designed the AcTO to allow a more comprehensive planning period during a critical transition. During source selection, the Government evaluates Lot 2 Offerors on their capability rather than a hypothetical approach/plan. This enables Government to sufficiently qualify Offerors and ensure that the awardee is capable of delivering a responsive approach to a theoretical, targeted scenario. The Government anticipates that the AcTO will include discovery, workshopping, negotiation, transition, and other preparatory activities. The onus is on the successful awardee to bring their own AcTO format and methodology in order to bring to bear their best practices on workshops, discovery, and metrics development.

One major output of the AcTO will be the scope, approach, and task order documents for the AHTO to be awarded as a logical follow-on.

The first AcTO period is anticipated to kickoff for all Lot 2 awardees immediately upon contract award. This initial AcTO period is intended to establish a baseline framework and fulfill the minimum ordering obligations of the WF3 contract's Lot 2 requirements.

3.1 Solicitation Requirements

Lot 2 Offerors are required to submit, with their proposals, a complete Performance Work Statement (PWS), Contract Data Requirements List (CDRL) forms, Quality Assurance Surveillance Plan (QASP), and any other supporting Attachments aligned to the Offeror's specific AcTO approach, which must comply with, but supplement, the following framework.

3.2 AcTO Multi-Phase Iterative Framework

The Government recognizes the importance of bilateral dialog to achieve a successful discovery and discussion period. The Government will make a good-faith effort to provide availability across critical stakeholders to participate during the AcTO period(s). However, it is understood that there may be some resistance to participation in this effort for a number of reasons. The contractor must take ownership, influence the Government, and drive towards a successful discovery and design period. The Government is specifying the following key Phases with the applicable Decision Point(s). The contractor shall provide, in its proposed PWS, the format, methodology, event structure, entry/exit artifacts, and any other information necessary to successfully implement its unique AcTO approach. The Government expects an iterative approach that may require sub-events or multiple feedback cycles for each step. If the contractor's approach requires delivery of an artifact in an earlier phase, the contractor may submit those artifacts in earlier phases.

Phase	Purpose	Due Date	Government Artifact Inputs*	Contractor Artifact Outputs*	Key Discussions/ Agreements*	Decision Point
Discovery/ Kick Off	Introductions of key AcTO stakeholders Identify data requirements for successful AcTO and transition plan	**	 Personas Pain Points Objectives Risks Concerns 	Kick Off Meeting / Summit Detailed Plan to Complete Phase Exit Criteria	Information / exchanges necessary to complete phase Entry / Exit Criteria for next phase	Government Board of Director (BOD) submission of requested information
Direction Check	Agree on strategic/high-level concepts to support delivery of a full design Allow for limited rampup of personnel in preparation for transition	**	**	Outcomes Limited ramp-up staffing plan ROM Ad-Hoc Task Order Basis of Estimate Ad-Hoc Task Order Documents Rough Draft	Viability of conceptual strategy and initial feedback	BOD approval of concept
Design Approval	Agree on full Ad-Hoc Task Order strategy and approach	**	**	DesignTransition PlanBasis of EstimateOutcome Metrics	Agreement on the strategy/ approach	BOD approval of strategy

	Allow for full transition activities and scale up	Incentive Thresholds Incentive Levels Incentive Rewards Ad-Hoc Task Order 90% Draft Task Order Documents	Transition POA&M	
Completion	Award of core task order	Final contracting documents		Ad-Hoc Task Order Award

^{*}Notional list, contractor may supplement at its discretion to align to its unique approach.

3.2.1 Initial Government Delivery

In the initial AcTO, the Government will provide preliminary artifacts to provide situational awareness of the PEO DHMS organizational posture. Subsequent AcTOs will include the topical artifacts necessary to establish a successful strategic approach for the follow-on AHTOs.

In the initial AcTO, the Government will facilitate a kickoff with the Government BOD to establish lines of communications within the PEO DHMS enterprise. Subsequent AcTO will establish communication channels with the subject matter specialists necessary to establish a successful strategic approach for the follow-on AHTO.

^{**}Contractor to define based on individual approach strategies.