|  |
| --- |
|  **Introduction:** This template is meant to assist agencies with writing a solicitation agile development services. Please read the [prerequisites](https://18f.gsa.gov/2019/02/28/prerequisites-for-modular-contracting/) for working this way and see an [example](https://github.com/ustaxcourt/case-management-rfq) of this method in practice.**How to use:** Tailor to your agency’s needs and delete all blue helper text. If you’re interested in working with 18F, get in touch at inquiries18f@gsa.gov. |

[Agency/State]

[Program]
Statement of Objectives for [Product]

|  |
| --- |
|  |

1. **Background and Purpose**

|  |
| --- |
| * *If you have additional supporting information that might be helpful to contractors, we suggest attaching it as an Appendix. We try to keep these solicitations brief, typically 20 pages or less.*
 |

**1.1 Background**

|  |
| --- |
| * *Include a brief summary of your agency’s mission.*
* *Include a brief summary about how your team fits within the agency.*
* *Write in plain language; assume that potential contractors have never heard of your agency.*
 |

**1.2 Problem**

|  |
| --- |
| * *The software product or service will be developed to solve a problem on behalf of users.*
* *Include a concise summary of the problem that needs to be solved.*
* *Call out pain points with existing implementation, if appropriate.*
 |

1. **Scope**

|  |
| --- |
| * *The scope should be defined by the product vision to enable flexibility in developing the solution.*
* *Include language to ensure that it’s clear that this project is open by default.*
* *Make sure the solicitation states what the contractor is responsible for vs. what the government is responsible for.*
 |

#

# 2.1 Product Vision

|  |
| --- |
| * *Product vision is the reason you’re creating the product; the overarching goal the team is aiming for.*
* *Product visions should be clear, concise, informative, and inspirational.*
* *When drafting, consider:*
	+ *Who is affected?*
	+ *What is the problem?*
	+ *How are we helping?*
	+ *What is the outcome?*
* *Do not include any implementation details.*
* *This is the legal scope of your contract.*
 |

The [agency] intends that the software delivered under this task order will be committed to the public domain. The Contractor will have to obtain [agency] permission before delivering software under this task order that incorporates any software that is not free and open source. The Contractor must post all developed code to a [Git] repository designated by the [agency].

**2.2 Anticipated Period of Performance, Budget, and Ceiling Price**

|  |
| --- |
| * *We recommend including the anticipated budget in the solicitation. Contractors have found it easier to right-size their proposed team when they have a sense of what the budget will be.*
* *We recommend the length of the contract not exceed three years. Anything longer could lead to too much dependency on a single contractor.*
* *When building your budget estimate, use* [*Contract Awarded Labor Category*](https://calc.gsa.gov/) *(CALC) to see labor rates typically charged to the Government by labor category.*
* *Depending on your scope of work, an agile development team of 4-8 people will cost around $1.5 - 2M per year.*
* *If your contracting officer is not comfortable including the budget in the solicitation, an alternative is to put forward the anticipated size of the team. You will get better bids when you are up-front with contractors. Otherwise, there is too much guess work and potential for pricing gamesmanship.*
 |

The not to exceed ceiling on this contract will be $W million for the X period of performance and up to an additional $Y million for Z option periods.

1. **Objectives**

**3.1 Backlog**

|  |
| --- |
| * *Include the draft product backlog of user stories. In some instances, epics were more appropriate for capturing the agency need.*
* *It’s important to note that these are primarily to give context to the contractors’ for the product that they will build — but these stories will change as the team begins working with your agency and the users. This is not the legal “scope” of the contract, but an ongoing project tool that will change, unlike the scope which is tied to product vision.*
* *More information on drafting user stories can be found* [*here*](https://www.mountaingoatsoftware.com/agile/user-stories)*.*
 |

The set of preliminary user stories set forth below will be the starting point for the development of software to be provided under this [contract action]. These preliminary user stories are provided only for illustrative purposes, and do not comprise the full scope or detail of the project. The [agency] expects that the Contractor will work closely with the Product Owner to perform regular user research and usability testing and to develop and prioritize a full gamut of user stories as the project progresses.

Individual user stories may be modified, added, retracted, or reprioritized by the [agency] at any time, and the [agency] expects that the user stories will be continuously refined during the development process.

* As a <type of user> I want <some goal> so that <some reason>.

**3.2 List of Deliverables with Quality Assurance Surveillance Plan (QASP)**

|  |
| --- |
| * *We recommend using the following QASP to ensure all code that is submitted is tested, properly styled, accessible, deployed, documented, and secure. This is the checklist that the technical team will be responsible for delivering against every sprint.*
* *The QASP may be included in the solicitation or in a stand-alone attachment.*
 |

The following chart sets forth the performance standards and quality levels the code and documentation provided by the Contractor must meet, and the methods the [agency] will use to assess the standard and quality levels of that code and documentation.

|  |  |  |  |
| --- | --- | --- | --- |
| **Deliverable** | **Performance Standard(s)** | **Acceptable Quality Level** | **Method of Assessment** |
| Tested Code | Code delivered under the order must have substantial test code coverage.Version-controlled [Agency] GitHub repository of code that comprises product that will remain in the government domain. | Minimum of 90% test coverage of all code. All areas of code are meaningfully tested. | Combination of manual review and automated testing |
| Properly Styled Code | [GSA 18F Front- End Guide](https://frontend.18f.gov/#js-style) | 0 linting errors and 0 warnings | Combination of manual review and automated testing |
| Accessible | Web Content Accessibility Guidelines 2.1 AA standards | 0 errors reported using an automated scanner and 0 errors reported in manual testing | <https://github.com/pa11y/pa11y> |
| Deployed | Code must successfully build and deploy into staging environment. | Successful build with a single command | Combination of manual review and automated testing |
| Documented | All dependencies are listed and the licenses are documented. Major functionality in the software/source code is documented. Individual methods are documented inline in a format that permit the use of tools such as JSDoc. System diagram is provided. | Combination of manual review and automated testing, if available | Manual review |
| Secure | OWASP Application Security Verification Standard 3.0 | Code submitted must be free of medium- and high-level static and dynamic security vulnerabilities | Clean tests from a static testing SaaS (such as Snyk or npm audit) and from OWASP ZAP, along with documentation explaining any false positives |
| User research | Usability testing and other user research methods must be conducted at regular intervals throughout the development process (not just at the beginning or end). | Research plans and artifacts from usability testing and/or other research methods with end users are available at the end of every applicable sprint, in accordance with the contractor’s research plan. | [Agency] will manually evaluate the artifacts based on a research plan provided by the contractor at the end of the second sprint and every applicable sprint thereafter. |

1. **Contract Place of Performance and Contract Type**

|  |
| --- |
| * *List place of performance. We recommend allowing performance to be off-site/distributed if at all possible because you’ll get access to the best talent and best prices.*
* *For contract type, we recommend a time and material contract with a not-to-exceed ceiling. Time and material contracts increase team flexibility and avoid the gamesmanship inherent in firm fixed pricing. The not-to-exceed ceiling limits agency risk.*
 |

The Contractor may choose the location(s) from which to perform the required software development services. [provide agency’s core working hours if you want to make sure the development team accommodates that schedule].

1. **Operating Constraints (Non-functional Requirements)**

**5.1 Environment**

|  |
| --- |
| * *List non-functional requirements that the contractor should be aware of such as development environment, integration with other systems, use of the* [*United States Web Design System*](https://designsystem.digital.gov/)*, etc.*
 |

**5.2 Personnel Skills and Knowledge**

|  |
| --- |
| * *We recommend only requiring two key personnel (most often, project manager and technical lead) to avoid bait-and-switch and also to prevent the bidding companies from having too many people waiting on the bench.*
 |

*Key Personnel* – The Contractor must designate both a Project Manager (PM) and a Technical Lead as Key Personnel for this project. The PM will be a direct liaison to the [agency] product team, and will be responsible for the supervision and management of all of the Contractor’s personnel. The Technical Lead must have a full understanding of the technical approach to be used by the Contractor’s development team and will be responsible for ensuring that the Contractor’s development team follows that approach.

**5.3 Special Clauses**

|  |
| --- |
| * *Include any special clauses, including data rights and invoicing instructions.*
* *See* [*here*](https://18f.gsa.gov/open-source-policy/) *for more information on how and why 18F uses open source software.*
 |

*Data Rights and Ownership of Deliverables* – the [agency] intends that all software and documentation delivered by the Contractor will be owned by the [agency] and committed to the public domain. This software and documentation includes, but is not limited to, data, documents, graphics, code, plans, reports, schedules, schemas, metadata, architecture designs, and the like; all new open source software created by the Contractor and forks or branches of current open source software where the Contractor has made a modification; and all new tooling, scripting configuration management, infrastructure as code, or any other final changes or edits to successfully deploy or operate the software.

To the extent that the Contractor seeks to incorporate any software that was not first produced in the performance of this task order in the software delivered under this task order, the [agency] encourages the Contractor to incorporate either software that is in the public domain, or free and open source software that qualifies under the Open Source Definition promulgated by the Open Source Initiative. In any event, the Contractor must promptly disclose to the [agency] in writing, and list in the documentation, any software incorporated in the delivered software that is subject to a license.

If software delivered by the Contractor incorporates software that is subject to an open source license that provides implementation guidance, then the Contractor must ensure compliance with that guidance. If software delivered by the Contractor incorporates software that is subject to an open source license that does not provide implementation guidance, then the Contractor must attach or include the terms of the license within the work itself, such as in code comments at the beginning of a file, or in a license file within a software repository.

In addition, the Contractor must obtain written permission from the [agency] before incorporating into the delivered software any software that is subject to a license that does not qualify under the Open Source Definition promulgated by the Open Source Initiative. If the [agency] grants such written permission, then the Contractor’s rights to use that software must be promptly assigned to the [agency].

1. **Instructions and Evaluation**

**6.1 Submission Instructions**

|  |
| --- |
| * *Most agencies have specialized instructions for receiving bids. Include those here, such as submission format, due date, where to send inquiries, etc.*
 |

**6.2 Instructions for Proposals**

|  |
| --- |
| * *We suggest using similar language to the text below for technical submissions and evaluation criteria.*
* *We recommend asking for samples of previous work (Git repositories) to demonstrate performance.*
* *We recommend conducting interviews to get a good sense of which proposed team will work best with the government team.*
 |

#### ›Technical Submissions

Technical submissions must consist of a technical proposal of no more than four (4) pages, a staffing plan of no more than three (3) pages plus resumes and signed letters of intent to participate, and references to one or more source code samples, preferably open source. Technical submissions may also include user research plans and design artifacts of no more than 30 pages combined. Technical proposals and staffing plans must be submitted using 12-point type.

The technical proposal must set forth the Offeror’s proposed approach to providing the services required, including the base software (if any) and programming language(s) the Offeror proposes to use. The technical proposal must also make clear that the Offeror understands the details of the project requirements. The technical proposal must also identify potential obstacles to efficient development and include plans to overcome those potential obstacles. The technical proposal must also include a description of the Offeror’s plans, if any, to provide services through a joint venture, teaming partner, or subcontractors.

The staffing plan must set forth the Offeror’s proposed approach to staffing the requirements of this project, including the titles of each of the labor categories proposed and proposed level of effort for each member of the Offeror’s development team. The staffing plan must also identify the proposed Project Manager and proposed Technical Lead by name, and include a resume for each. Those resumes must include a brief description of the experience and capability for each individual, but cannot exceed one (1) page in length each. Offerors proposing Key Personnel who are not currently employed by the Offeror or a teaming partner must include a signed letter of intent from the individual proposed as Key Personnel that he/she intends to participate in this project for at least one (1) year. The staffing plan must also set forth the extent to which the proposed team for this project was involved in the development of the source code referred to in the next paragraph.

The staffing plan must set forth and explain the extent to which the Offeror will provide individuals with experience in at least each of the following areas [tailor for your project]:

* Agile development practices
* Automated (unit/integration/end-to-end) testing
* Continuous Integration and Continuous Deployment
* Refactoring to minimize technical debt
* Application Protocol Interface (API) development and documentation
* Open-source software development
* Cloud deployment
* Open-source login/authentication services
* Product management and strategy
* Usability research, such as (but not limited to) contextual inquiry, stakeholder interviews, and usability testing
* User experience design
* Sketching, wireframing, and/or prototyping, and user-task flow development
* Visual design
* Content design and copywriting
* Building and testing public facing sites and tools

The references to one or more source code samples must be either links to Git repositories (either credentialed or public) or to equivalent version-controlled repositories that provide the [agency] with the full revision history for all files. If an Offeror submits a link to a private Git repository hosted with GitHub, the [agency] will provide the Offeror with one or more GitHub user identities by email, and the Offeror will be expected to promptly provide the identified user(s) with access to the private Git repository.

The source code samples should be for projects that are similar in size, scope, and complexity to the project contemplated here. The source code must have been developed by either (i) the Offeror itself, (ii) a teaming partner that is proposed in response to this RFQ, or (iii) an individual that is being proposed as Key Personnel for this project. The [agency] would prefer that the source code samples have been for recent projects involving teams of approximately X - Y [tailor for your project] Full-Time Equivalent (FTE) personnel.

If the references to source code samples provided do not include associated references to user research plans and design artifacts demonstrating how ongoing user research was incorporated into the project, then the Offeror must submit a user research plan and design artifacts relating to at least one (1) of the source code samples provided.

#### Price Submissions

Price submissions must set forth a single dollar amount that represents the Offeror’s estimate of the total cost to the [agency] for the development services and travel expenses required for [period of performance]. [Instructions on providing price proposal, typically an excel workbook]. The [agency] expects that the labor categories and staffing levels set forth by the Offeror in the Excel workbook will be consistent with the Offeror’s staffing plan.

The Contractor will be compensated at loaded hourly rates. The [agency] intends to evaluate proposals and award based on initial proposals, and therefore the Offeror’s initial proposal should contain the Offeror’s best terms.

#### Interviews

The Offerors with the most highly rated written submissions will each be invited to participate in an interview as part of the evaluation process. Each interview will be conducted remotely via video connection and/or teleconference. The [agency] will communicate with certain Offerors to schedule the dates and times of interviews.

Each interview will include an unstructured question and answer session, during which Offerors will be asked questions about the technical aspects of their proposal and their approach to software development. The [agency] expects these interviews will assist the [agency] to assess the technical abilities of the proposed development team and to better understand the proposed technical approach described in the Offeror’s written submission. Both of the Offeror’s proposed Key Personnel must participate in the interview.

The Introductions phase of each interview will last approximately 5 minutes, during which the Offeror and [agency] interview team members will introduce themselves.

The Open Technical Session of each interview will last approximately 45 minutes, during which the Offeror interview team will respond to the [agency’s] questions related to the technical aspects of the Offeror’s proposal. Offerors will NOT be able to use or present any slides, graphs, charts, or other written presentation materials, including handouts. There will be no follow-up session for further questions after this part of the interview.

The Closing Remarks phase of each interview will last approximately 5 minutes, during which the Offeror may make a short presentation summarizing the Offeror’s responses to the [agency’s] questions.

Interviews will not constitute discussions. Statements made during an interview will not become part of the agreement.

### Basis of Award and Evaluation Factors

Each submission received by the [agency] will be evaluated for technical acceptability. Submissions that are determined to not be technically acceptable after the Offeror has been given the opportunity for a clarification will not be evaluated further.

Quotes must be realistic with respect to technical approach, staffing approach, and total price. Quotes that indicate a lack of understanding of the project requirements may not be considered for award. Quotes may indicate a lack of understanding of the project requirements if the staffing plan does not use a realistic mix of labor categories and hours, or if any proposed hourly labor rates are unrealistically high or low.

The [agency] will evaluate quotes that are technically acceptable on a competitive best value basis using a trade-off between technical and price factors. Technically acceptable submissions will be evaluated based on four (4) evaluation factors. These factors are

(1) technical approach, (2) staffing approach, (3) similar experience, and (4) price. The three (3) technical, non-price evaluation factors, when combined, are significantly more important than price. The [agency] may make an award to an Offeror that demonstrates an advantage with respect to technical, non-price factors, even if such an award would result in a higher total price to the [agency]. The importance of price in the evaluation will increase with the degree of equality between Offerors with respect to the non-price factors, or when the Offeror’s price is so significantly high as to diminish the value to the [agency] of the Offeror’s advantage in the non-price factors.

#### Technical Approach

In evaluating an Offeror’s technical approach, the [agency] will consider (a) the quality of the Offeror’s plans to provide the open source, agile development services required, including user research and design, (b) the extent of the Offeror’s understanding of the details of the project requirements, and (c) the extent to which the Offeror has identified potential obstacles to efficient development, and has proposed realistic approaches to overcome those potential obstacles.

#### Staffing Approach

In evaluating an Offeror’s staffing approach, the [agency] will consider (a) the skills and experience of the Key Personnel and other individuals that the Offeror plans to use to provide the required services, (b) the mix of labor categories that will comprise the Offeror’s proposed development team, and (c) the Offeror’s proposed number of hours of services to be provided by each member of the Offeror’s proposed development team.

#### Similar Experience

In evaluating an Offeror’s similar experience, the [agency] will consider the extent to which the Offeror has recently provided software development services for projects that are similar in size, scope, and complexity to the project described in this RFQ, and the quality of those services. In evaluating the quality of those services, the [agency] will consider, among other things, the revision history for all files in the source code samples provided. The [agency] will also consider the user research and design-related artifacts that were associated with the source code samples provided or submitted separately. In considering an Offeror’s similar experience, the [agency] may also consider information from any other source, including Offeror’s prior customers and public websites.

#### Price

In evaluating an Offeror’s price, the [agency] will consider the total of the Offeror’s estimated costs for the development services, and travel expenses proposed, for [period of performance]. This total amount will be [excel workbook].