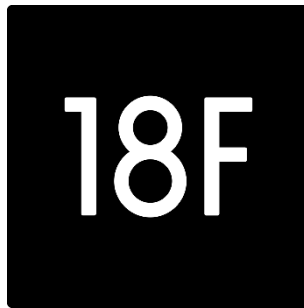
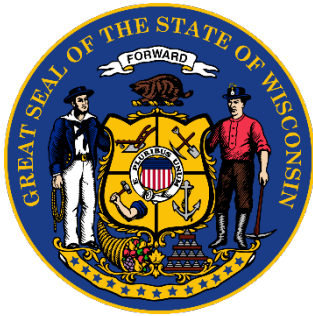


*Proposal:*

## Wisconsin Department of Workforce Development & 18F/TTS



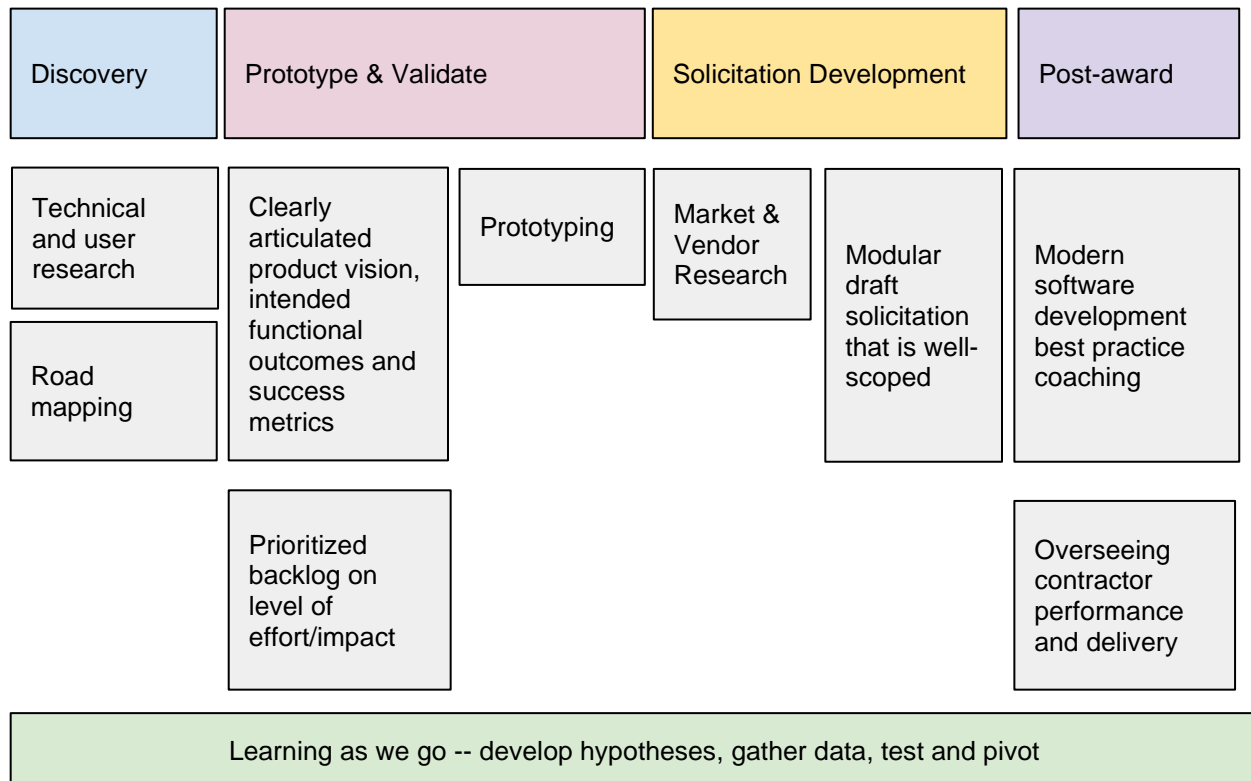
### Opportunity Statement

Based on our recent conversations, 18F/TTS (18F) understands that the State of Wisconsin's Department of Workforce Development (DWD) is seeking assistance from 18F to conduct modular contracting to modernize the current Unemployment Insurance (UI) information technology (IT) system and connected IT systems. The current system is primarily written in COBOL and is hosted on a mainframe. 18F believes an agile acquisition approach will help Wisconsin residents access, apply for, and receive unemployment benefits in a profoundly more accurate and efficient manner; allow employers to receive accurate and timely charging information; and make other improvements that will allow DWD staff to effectively perform UI functions. 18F has the technical expertise to help DWD.

**18F will deliver an evidence-based solicitation package by working with the DWD team, using agile methods, to support DWD's goal of delivering a modernized UI system.** Below is a high-level proposal for how we will work together on this project.

# Project Overview

18F will apply an agile, user-centered approach to developing software solicitations with DWD. This is a repeatable approach that can be used across other Wisconsin projects.



## 18F Phases of Work

18F anticipates four phases of work – discovery, prototype and validate, solicitation development, and post-award management – during a total six-month period.

### 1. Accelerated Discovery (4-6 weeks)

A discovery phase will allow 18F to build on and validate existing research by Google and other DWD partners. This phase will translate DWD's modernization needs into straightforward acquisition recommendations. Throughout the discovery phase, 18F will need to be able to work closely with the DWD team – DWD program expertise and project knowledge are necessary ingredients for success. At the end of the discovery phase, 18F and DWD will jointly craft a roadmap with priorities to meet DWD's goals,

and 18F will make recommendations for moving forward with the greatest speed, lowest cost and least risk for the project. In the discovery phase, 18F will deliver the following to DWD:

- A North Star development & research plan
- Review of existing materials
- User, technical, and stakeholder interviews
- Synthesized information, user stories, and service design blueprint
- Prioritized and actionable technical roadmap

## **2. Prototype & Validate Sprint (1 month)**

Building on the discovery phase, a larger 18F team with both technical and acquisition skills will work shoulder-to-shoulder with the DWD team during the prototype and validate phase on a series of activities to ensure the vendor team can succeed. The activities during this phase will include:

- Leading a kickoff with a week-long acquisition and prototyping workshop with DWD staff to:
  - Develop a draft Request for Proposals (RFP) or series of RFPs for release
  - Post draft RFP(s) for targeted industry feedback (2-3 week comment period)
- Conducting technical prototyping to de-risk the pending procurement, including:
  - Probing into the system to learn what issues may exist prior to a vendor team(s) landing
  - Documenting existing systems, dependencies, and risk for the incoming vendor team(s)
- Laying the technical groundwork for the pending acquisition(s)
- Laying the procurement groundwork for the initial acquisition
- Teaching DWD staff how to improve oversight and collaboration with a modern software vendor

## **3. Solicitation Development (1 month)**

As soon as reasonably possible, but no later than 10 weeks after the project commences, 18F will compile all findings from the prototype and validate phase to draft solicitation(s) . DWD's ultimate goal is to issue an RFP or a series of RFPs that lead to the selection of a highly qualified vendor team or teams. DWD will execute the final buy(s). 18F will collaborate with DWD contracting personnel to prepare:

- The acquisition strategy with suggested sources and evaluation criteria
- Market research, including a build versus buy analysis
- An independent government cost estimate of vendor services
- A finalized solicitation that meets DWD's technical requirements and incorporates industry best practices

During this phase, 18F will also provide:

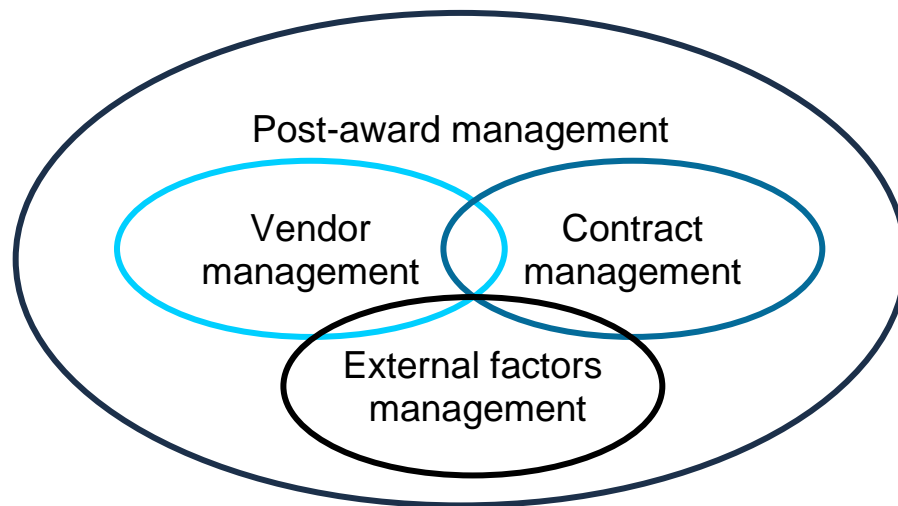
- Technical assistance in the review of vendors' proposals to ensure that the vendors can meet DWD's requirements
- Technical assistance and support through the negotiation, award drafting, and award processes, including assistance with vendor interviews for the first solicitation
- Final recommendations delivered in a final report, presentation, and a post-mortem meeting

#### **4. Post-Award/Vendor Management Support (3 months plus additional time as needed)**

The objective of post award management phase is to ensure that all parties adhere to the terms and conditions of the contract, including the submission of deliverables, and to ensure that DWD is leveraging modern software development best practices (user-centered design, iterative development methodologies, product ownership, DevSecOps, etc). Post-award management activities that 18F will provide include vendor management, contract management, and external factors management:

- **Contract management** is the process of ensuring all terms and conditions of the contract are met by both parties (vendor and DWD). Contract management is the responsibility of assigned DWD personnel.
- **Vendor management** is the process of ensuring vendors are performing in accordance with the contract. Vendor management applies to not only a specific contract but to all vendors supporting this project and DWD. Vendor management is performed at the contract level.
- **External factors management** is the oversight and management of factors external to the contract that impact the project. For example, obtaining an authority to proceed (ATO), obtaining approval for data collection storage,

Chief Information Officer (CIO) approval, etc.



During this phase, 18F will do the following:

- Provide a week-long post-award orientation to securely hand-off the work DWD has in progress to a qualified vendor or vendors. This will include:
  - Assistance in ensuring that each vendor is adhering to commercial best practices and meets the DWD's requirements, as defined in the contract
  - Coaching DWD on how to build a collaborative, open, and transparent working relationship with the vendor(s) where the government product owner is seen as a part of the delivery team
- Provide vendor oversight, quality assurance surveillance (e.g., code reviews of vendor work to ensure contract compliance), and coaching to DWD's staff on how to do this without the assistance of 18F
- Coach DWD on modern software development practices, including product ownership, user-centered design, user research, code, content, and agile/iterative development practices, and creating a healthy DevSecOps pipeline
- Coach DWD on effective stakeholder communication strategies to stay aligned on product vision and roadmap

## Details:

- Cost: Actual costs will be based on time and materials not to exceed \$1.2

million without the authorization of DWD.

- Period of Performance: Date of final signature through one year from the date of the last party's signature
- Duration of Initial Project: 6 months, potentially longer as needed
- DWD Commitment: Sustained involvement from DWD before and after award, executive stakeholders, and relevant subject matter experts from leadership, legal, procurement, program areas, and IT
- 18F Commitment:
  - 3 FTEs (36 hours/week) and 3 half-time (18 hours/week) staff during the discovery phase, and 4-6 FTEs (time commitment to be determined) during later phases, with expertise in agile acquisitions, user experience (UX) research, product management, engineering. The 18F team will:
    - Remain consistent throughout the duration of the project
    - Consist of senior technologists with 10+ years of relevant experience
  - Support for an 18F account manager, engagement support, and additional ad-hoc skill needs

# Request for Vendor Information Regarding Communication Center Solutions

## Overview

The Department of Workforce Development (DWD) is exploring purchasing a cloud-based communications center solution that will provide seamless integration of a telephony solution with customer relationship management (CRM), workforce optimization, and reporting solutions. DWD seeks to provide customer service solutions that allow for 24/7 responsiveness in a variety of communication formats to best serve the needs of the public. This would provide DWD with the following benefits:

- Easy use for agents and management staff alike with the resources needed to make business driven decisions;
- Integration of inbound and outbound solutions for improved customer experience;
- Tools and reporting for staff assignment and to analyze agent performance; and
- Scalability to meet the ever-changing needs of our program.

DWD has determined that use of the NASPO ValuePoint contract, which was competitively awarded and DWD will use through collective purchasing, will allow DWD to expedite its selection of a highly qualified vendor for this project. DWD is seeking the answers to the questions it has posed below from the vendors on the NASPO ValuePoint contract to drive its procurement decisions for this purchase.

## Questions and Requests for Information

- **Implementation Costs**
  - Does the cost of the product include implementation services?
  - Is implementation done with/through an internal team or outsourced? How fast are resources made available once a decision is made to move forward with your solution?
  - What are your estimated costs for implementation?
- **Additional Resources**
  - Will DWD need resources beyond the cloud-based call center solution? If so, please explain what resources you anticipate DWD will need.
  - Provide a detailed overview of the features that are built in?
  - Are there any other features that DWD may have missed in the "Requirements" section below that you want to make us aware of?
- **Service Levels**
  - Provide your standard Service Levels. (For example, up time, call quality, response times for issues, etc.)
  - How often are upgrades performed and how are they communicated? Do the upgrades affect service as they occur?
- **Connectivity**
  - How would DWD securely connect to the telephone solution (e.g., separate secure voice tunnel)? Please note that DWD has had issues with connecting through our VPN.

- **Restrictions / Limitations**
  - Are there any restrictions, such as internet speeds, that DWD would need to address to support the solution?
  - Provide a list of hardware / software (e.g., headsets, operating systems, browsers, etc.) that work with the solution or does not work with the solution (whichever is easier to provide)?
- **User Operating Systems**
  - How does your solution work with a DWD user's PC operating system? Our experience with one of our solutions is that there is a 15-minute timeout, requiring users to log in every 15 minutes. Please note that DWD would prefer integration with a single sign-on feature that is integrated with multi-factor authentication.
- **Reporting**
  - How do you approach reporting?
  - What typical reporting tools do you use?
- **Security**
  - Provide information on your security and access controls that would assist DWD.
  - Do you have any additional security or compliance certifications that may impact DWD or this project? If so, please describe these certifications and any potential impacts.
  - What security framework will DWD need to align with?
- **Emergency Shut Down or Re-Route**
  - Under your solution, would DWD be able to perform an emergency shutdown of all tenants with one action?
  - Under your solution, would DWD be able to shut down individual tenants separately?
- **Data Security**
  - Are you able to meet the confidentiality safeguard requirements under [Wis. Admin. Code § DWD 149.06](#) and would you agree to comply with the additional requirements for data sharing at [Wis. Admin. Code § DWD 149.07\(4\)\(b\)](#) and any other applicable confidentiality or IT security requirements?

## Requirements

For your consideration in providing information related to the above questions, DWD's current understanding of our requirements is detailed in the table below. Please note, DWD's requirements are subject to change pending cost, functionality, and integration possibilities and final requirements will be included in the contract.

Title	Description
Capacity Needs	1. Ability to expand/contract the system (both at the enterprise and group levels) to take a varying level of calls, but also varying levels of concurrent calls. See the estimated need above for more information on the volume.
	2. DWD's current operations are 6:00 AM CST to 6:30 PM CST but should be able to be extended as needed to meet customer demands.



Title	Description
	<p>3. Scalability and flexibility for fluctuating call volumes – DWD's weekly call volume can be as low as 12,000 calls per week to over 6 million calls per week (2 million calls per day) with the maximum inbound calls reaching over 5 million calls in one day during the COVID-19 pandemic.</p> <p>4. At least 325 concurrent users, including call center staff and supervisors – Under current staffing levels related to the COVID-19 pandemic, DWD has approximately 600 users of the call center but may decrease the number of concurrent users to 80 during lower need times.</p> <p>5. Minimal outages of less than 1 hour.</p>
Features	<p>6. Have all standard call features for a call center, such as mute, hold, conference, transfer, voicemail, ability to see missed calls, etc. For voicemail, the preference would be to have the option to queue or go to voicemail and have this be something that could be configured. In addition to standard options, have the option for virtual holds that can be configured as needed (see #27, below). Voicemail interaction routing (workgroup voicemail).</p> <p>7. Handle outbound calls the same way as inbound, recording, and reporting.</p> <p>8. Create queues and control call flow within the queues. Call flow options (basic IVR) that allow set up for a variety of situations, including the ability to integrate outside call centers/vendors. This would allow a caller to make a selection, so they are connected to the appropriate solution. Preference is that we can control this set up ourselves.</p> <p>9. Provide an interface that makes for easy configurability of all administrative tools, including user assignment, call flows, and options (call-back, call wait time announcement, and waiting room). Ability to track administrative changes, upload prompts, make call flow changes, etc.</p> <p>10. Ability to provide banner messaging to agents within a group.</p> <p>11. Provide the agent answering the call with screen pops that provide caller ID and other information we collect from the caller and / or recorded greetings that automatically announce the agent.</p> <p>12. Ability to build in data collection in the call flow, such as Social Security Number (SSN), call purpose, and call history, that can then present to the agent when the call is coming in (screen pops).</p> <p>13. Ability to provide or integrate with an industry leading AI-based chatbot for calls. This would be something that can be configured as needed at the specific line level.</p> <p>14. Integration with email, short message service (SMS), and/or chat.</p> <p>15. Administrative functionality that allows DWD to assign user level roles as such as:</p> <ul style="list-style-type: none"> <li>a. Supervisor level functions such as: agent level real time statistics, coaching, barging into a call, and listening;</li> <li>b. Workgroup level functions such as real time longest hold and workgroup counts; and</li> <li>c. Training group listen in to a call (more than one user).</li> </ul>
Configuration	<p>16. Ability to have independent configuration at the line level for key elements. These elements include, but are not limited to, the following:</p>

Title	Description
	<p>a. Thresholds can be managed at a line of business level (i.e., discrete thresholds per line of business). In our current system, the number of concurrent calls is managed at an enterprise level, which has caused issues at peak times.</p> <p>b. All configurable items can be managed either at an enterprise level or at the line of business level.</p> <p>c. Security protocols will be configurable based on the needs of the lines of business. One example is that one line of business needs FTI compliance, including the ability to record on demand, but not all areas would have the same requirements.</p> <p>17. Ability to group agents and users of the system based on skill group, workgroup, and / or supervision level.</p> <p>18. Transfer availability and ability to set fast groups / speed dials at the user and administrative level.</p> <p>19. Ability to save view configurations and report configurations.</p> <p>20. Be configured for production and training environments.</p> <p>21. Provide call dispositioning / statuses that can be configured at a line of business level.</p> <p>22. Ability to record and upload messaging and configure the call flow that accompanies the messaging.</p> <p>23. Provide overflow group that allows those agents that are not scheduled as fully "ready" to be assigned a call when a threshold has been met. This may be a rollover feature whereby if the person is on hold for a certain amount of time that it rolls into another queue to be addressed.</p> <p>24. Ability to make an audible ring or visible cue (outside of the headset) for those agents that are assigned to a queue but do not receive many calls.</p> <p>25. Ability to set call priorities based on call type.</p> <p>26. For outgoing calls, ability to define what is provided in the caller ID. DWD would prefer to have the caller ID display the State of Wisconsin in some format for credibility purposes.</p> <p>27. Ability to integrate through a standard API with other systems (e.g., UI system) in a way that would allow information to flow between the two systems. The best example of this is to identify all the names in our eligibility system that are associated with a phone number so that information can be presented to the agent. Would like the "customer file" to be integrated into our existing solution.</p>
Scheduling / Time Off Requests	<p>28. Provide an integrated scheduling solution that allows for both time off requests and agent scheduling, so this information is in one place. This includes agents placing or submitting requests for time off, approval of that time off, tracking and monitoring of agents, availability, and compliance with the schedule. The scheduling must have the capacity to track the work type for each agent for a given day, training, and meetings.</p> <p>29. Provide call forecasting that will provide the expected call level and agents needed to meet call level. Should be able to enter known influences that could change the levels. For example, the Bureau of Benefits may enter information</p>

Title	Description
	related to plant shutdowns and mass layoffs or the Bureau of Tax and Accounting could enter the dates billing statements are issued.
Virtual Hold	30. Provide an option for virtual hold that can be configured as is needed.
Call Quality / Monitoring Form	31. Provide integrated call monitoring or quality form that can be integrated with that call. This includes scoring and monitoring of the results in the cloud. Ability to share that call and the findings with the agent after it has been released.
Call Recordings	32. Ability to record all calls and play back as needed, along with a view of the screen that is displayed as the agent was on the call (as is available in our current contracted solution). These recordings will have to adhere to state record retention requirements.
	33. Ability to search call recordings by a unique identifier for the caller (e.g., UI account number; this assumes integration with DWD systems). Call recordings need to be tied to CRM.
	34. One subunit needs the ability for agents to select whether and when to record a call.
Real Time Alerts	35. Alerts that identify important issues. For example, service levels, call volumes that are over thresholds, etc.
Reporting	36. Provide written agreement that all data collected through the use of this system would be owned by DWD and must adhere to state records retention requirements.
	37. For reporting, provide the greatest possible detail and flexibility to give DWD options for pulling the data that it needs. DWD expects dynamic reporting and dashboarding capabilities.
	38. Ability to schedule and auto generate reports as well as build custom reporting. Custom reports that are used frequently should be able to be saved. Reporting that be done based on skill group, workgroup, and/or supervisory workgroup.
	39. Real time dashboard or real time reporting that can access both summary data and detailed data addressing all contact types and features (e.g., virtual hold): number of unique callers, repeat callers, and information on the calls received, including but not limited to the date and time of incoming or outgoing call, length of the call, wait time, disposition of the call, and any errors or issues with that call.
	40. User level call history that can be searched based on phone number or other identifying information in the system.
	41. Application Programming Interfaces (APIs) or extracts that can be integrated into a business intelligence environment (i.e., raw data extracts). DWD uses Business Objects as its business intelligence tool.
Compliance	42. Federal Tax Information (FTI) Compliance: Ensure that IRS Section 9.18.13 on Voice over IP Networks is otherwise FTI compliant.
	43. Payment Card Industry (PCI) Compliance.
	44. All data to be transmitted and stored within the United States.
Access / Security	45. DWD prefers that there be a single sign-on option and that this is integrated with multi-factor authentication.
Monitoring	46. Ability to track real-time idle statuses.

Title	Description
	47. Ability for live listening to calls by supervisors to monitor calls remotely. Prefer ability for multiple individuals to listen at one time without being heard from remote locations. (Note: FTI requirements may apply on certain calls).
Technical	48. Ability to work within a Virtual Desktop Infrastructure (VDI) environment.
	49. Ability to work with DWD's standard operating system. Currently, we are Microsoft based.
	50. Preference for a browser-based solution (no local install).
	51. Preference for a broad range of compatible hardware (headsets) that work with the solution. Currently, DWD has a very restrictive list of hardware that will work with our given solution.
	52. Preference for a vendor with a current FedRamp authorization at a minimum impact level of Moderate.
	53. Availability of extensive RESTful APIs for easy integration with DWD business applications.



# Tony Evers

Office of the Governor | State of Wisconsin

## DELEGATION OF AUTHORITY

In accordance with Wisconsin State Law, I, Tony Evers, Governor of the State of Wisconsin, delegate the authority and responsibility to request services from the Federal Government on behalf of the Governor for agile acquisition services to assist with a project to update the Department of Workforce Development's information technology systems to Secretary-designee Amy Pechacek of the Department of Workforce Development. To this end, Secretary-designee Pechacek will execute agreements with the General Services Administration on behalf of the Governor for services provided by the General Services Administration under the Intergovernmental Cooperation Act, 31 U.S.C. § 6505.

Dated: 3/9/2021

Signed:

A handwritten signature in cursive script that reads "Tony Evers".

Governor Tony Evers

**MEMORANDUM OF UNDERSTANDING**  
**Between**  
**Wisconsin Department of Workforce Development**  
**and**  
**U.S. Digital Response**

**I. Purpose**

The purpose of this Memorandum of Understanding (“MOU”) is to document an agreement between the Wisconsin Department of Workforce Development (the “Department”) and U.S. Digital Response, a fiscally sponsored project of Community Initiatives (“USDR”) (collectively, the “Parties”).

**II. Introduction/Background**

The purpose of this MOU is for USDR to assist the Department with the following:

- A) Laying out the framework for the Department's Unemployment Insurance (“UI”) modernization project, including short- and long-term goals and plans (the “Framework”); and
- B) Leveraging user research, including data provided from the Department, to make progress on one or more pieces of the project.

**III. Roles and Responsibilities**

**A. The Department will:**

- 1. Provide relevant data, in accordance with Section VII. E below, and explanations thereof from various Department offices and programs;
- 2. Provide access to various Department personnel; and
- 3. Provide oversight and guidance regarding its desired framework for the UI modernization project.

**B. USDR will:**

- 1. Receive relevant data from the Department regarding various Department programs;
- 2. Coordinate interviews and shadowing with various Department personnel;
- 3. As directed by the Department, work cooperatively with other industry experts or organizations that the Department engages for assistance in completing its UI modernization project;
- 4. Write a report describing USDR's recommended framework for the Department's UI modernization projects and describing the results from any project-specific work completed under this MOU;
- 5. Comply with applicable legal and policy mandates to ensure confidentiality of identifiable consumer information; and
- 6. Report any actual or potential incidents involving individually identifiable information to the Department in order to address any risk or breach of such information, consistent with Section VI, below.

**C. Both parties will jointly:**

- 1. Participate in discussions regarding the development of recommendations;

2. Meet periodically, either virtually or by phone, to evaluate progress;
3. Comply with applicable legal requirements;
4. Address electronic system concerns; and
5. Address other related issues, as needed.

#### **IV. Term of Agreement**

This MOU will be effective from March 8, 2021 through the earlier of the completion of the Framework and the related support needed by the Department, as determined by the Parties, or April 30, 2021. This MOU may be amended or revoked at any time at the request of either party, in writing, upon 30 days written notice to the other party.

#### **V. Payment Details**

a. Payment Terms (*Check One*):

- i.  There is no monetary value associated with this MOU. USDR is providing these services gratuitously and agrees that it will seek no payment from the Department for its provision of these services.
- ii.  The monetary value associated with this MOU is: \$Click or tap here to enter text., to be paid Click or tap here to enter text.(e.g., monthly, quarterly, annually, fee for service), starting on Click or tap to enter a date. (e.g., date) and ending on Click or tap to enter a date.(e.g., date).

b. Payment Method: Not applicable

#### **VI. Confidentiality**

To the extent that the services carried out under this MOU involve the use, disclosure, access to, acquisition or maintenance of information that actually or reasonably could identify an individual or consumer receiving benefits or services from or through the Department (“Protected Information”), both parties agree to a) maintain the confidentiality and security of such Protected Information as required by applicable state and federal laws, rules, regulations and Department policy, b) contact the Department within 24 hours of a privacy or security incident that actually or potentially could be a breach of Protected Information, and c) cooperate with the Department in its investigation and any required reporting and notification of individuals regarding such incident involving Protected Information.

#### **VII. General Terms**

A. The Terms and Conditions of Partner Participation at

<https://policies.usdigitalresponse.org/terms-and-conditions-of-partner-participation> constitutes part of this MOU and are incorporated by reference as if fully stated herein.

B. Entire Agreement

This MOU constitutes the entire agreement between the parties and may be modified only by a writing signed by both parties. No promises, terms or oral discussions will be binding upon the Parties.

C. Public Records

It is the intention of the Department to maintain an open and public process in all of its activities. Pursuant to §19.36 (3), Wis. Stats., all records that are produced or collected under this MOU may be subject to disclosure pursuant to a public records request. Upon receipt of notice from the Department of a public records request for records produced or collected under this MOU, USDR shall provide the requested records to the Department.

D. Organizational Conflicts of Interest

USDR agrees that it will not participate as a contractor or subcontractor in any contracts the Department awards related to the implementation of framework created under this MOU without first submitting an organizational conflict of interest mitigation plan to the Department and receiving the Department's approval of the plan.

E. Restrictions on Data Sharing

Without entering into a separate data sharing agreement, the Department will not disclose to USDR any of the following under this MOU:

- Federal Tax information (FTI), including tax returns or return information received directly from the IRS or obtained through an authorized secondary source, such as Social Security Administration (SSA);
- Any information it has received or accessed from the SSA under its Information Exchange Agreement with the SSA; or
- Any UI records, as defined in Wis. Admin. Code § DWD 100.02(67).



## VIII. Signatures

### For the Wisconsin Department of Workforce Development:

DocuSigned by:



C68A3A9F37D0468

Amy Pechacek


Secretary-designee

3/9/2021

Date

### U.S. Digital Response

DocuSigned by:



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Raylene Yung

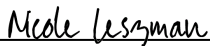
CEO

3/10/2021

Date

### Community Initiatives

DocuSigned by:



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3/11/2021

Date

# **INTERGOVERNMENTAL COOPERATION ACT AGREEMENT BETWEEN THE GENERAL SERVICES ADMINISTRATION AND STATE OF WISCONSIN**

## **PART A – General Terms & Conditions**

### **1. PARTIES AND PURPOSE.**

This agreement is between the State of Wisconsin (referred to hereafter as “Wisconsin” or “the Receiving Entity”) and the U.S. General Services Administration’s (GSA) Technology Transformation Services (TTS) through which the Receiving Entity will pay the TTS to provide the following specialized or technical services: agile acquisition consulting.

### **2. AUTHORITY.**

The authorities for the parties to enter into this agreement is the Intergovernmental Cooperation Act, 31 U.S.C. § 6505.

### **3. PERIOD OF AGREEMENT.**

The terms and conditions described in Part A of this Agreement become effective when signed by authorized officials of both GSA and the Receiving Entity and remain effective from date of final signature through 12 months from date of final signature, unless amended or terminated in accordance with Section 7.

### **4. ROLES & RESPONSIBILITIES OF THE PARTIES**

To ensure best execution of the agreed-upon work under this agreement, the Receiving Entity must make the following commitments to the TTS:

- A. Provide necessary key personnel during the engagement, such as project/product manager and contracting representative, which typically consists of 2-3 representative users but may vary; and
- B. Provide TTS with any and all relevant procurement and/or technical related documents.

### **5. BILLING & PAYMENT**

A. Receiving Entity agrees to pay GSA for the actual costs of services performed by GSA on a reimbursable basis. Invoices for actual costs incurred shall be submitted monthly, in arrears, not later than 30 days after the end of the billing period.

B. GSA Submission of Invoices. GSA invoices shall be submitted directly to the Receiving Entity’s administrative contact, listed below. GSA Invoices shall be submitted monthly, in arrears, not later than 30 days after the end of the billing period. Invoices shall be submitted in soft copy. Invoices must detail the labor category hours with hourly rate(s), and must include the following:

- 1. Transmittal with the Agreement number;

2. A certification statement by an TTS 18F official, attesting to the accuracy of the invoice data; and
3. Copies of timesheet(s) or electronic time reports.

C. Transfer of Funds. Funding transfer(s) will be carried out by the Receiving Entity on a monthly basis in accordance with invoices received.

## **6. ESTIMATED AGREEMENT AMOUNT FOR ALL ORDERS PLACED ON UNDER THESE GENERAL TERMS & CONDITIONS**

The maximum amount payable under these GT&C shall not exceed \$1.2 Million. There will be a separate funding document for each order placed under these GT&C.

## **7. DURATION OF AGREEMENT, AMENDMENTS AND MODIFICATIONS.**

This agreement will become effective when signed by all parties. The agreement may be amended at any time by mutual written consent of the parties. Any party may terminate this agreement by providing 30 days written notice to the other party. In the event of termination, the TTS shall be paid for all services provided up through the date of termination.

## **8. RESOLUTION OF DISAGREEMENTS.**

Should disagreement arise on the interpretation of the provisions of this agreement, or amendments and/or revisions thereto, that cannot be resolved at the operating level, the area(s) of disagreement shall be stated in writing by each party and presented to the other party for consideration. If agreement on interpretation is not reached within 30 days, the parties shall forward the written presentation of the disagreement to respective higher officials for appropriate resolution.

## **9. REVIEW OF PART A.**

The parties agree to review jointly the terms and conditions in Part A at least annually if the period of this agreement, as identified in Section 3, exceeds one year. Appropriate changes will be made by amendment to this agreement executed in accordance with Section 7. The parties further agree to review performance under this agreement to determine if expectations are being met and document a summary of their assessment. The responsible reviewing official at each agency shall sign and date the assessment.

## **10. WRITTEN REQUEST FOR TECHNICAL INFORMATION AND ADVICE.**

Before this agreement is executed, GSA must first receive a written request for technical information and advice from the head of the state or local government.

## 11. CONTACTS.

### TTS

**Technical Contact**  
Name: Cristina Brydges  
Acting Assistant  
Commissioner for  
TTS-Clients & Markets  
Address: 1800 F. St., NW  
Washington, DC 20405  
E-mail: cristina.brydges@gsa.gov

**Administrative Contact:**  
Ashley Owens  
Acting Deputy  
Executive Director and  
Senior Advisor of  
Acquisition  
1800 F St., NW  
Washington, DC 20405  
ashley.owens@gsa.gov

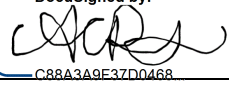
### State of Wisconsin

**Technical Contact**  
Name: Neeraj Kulkarni,  
CIO/ BITS Bureau Director  
Address: 201 East Washington Ave.  
Madison, WI 53703  
E-mail: neerajv.kulkarni@dwd.wisconsin.gov

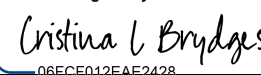
**Administrative Contact:**  
Stacia Jankowski,  
Office of Integrity and  
Accountability Director  
201 East Washington  
Avenue  
Madison, WI 53703  
stacial.jankowski@dwd.wisconsin.gov

## 12. APPROVALS.

### FOR the State of Wisconsin:

DocuSigned by:  
  
C88A3A9E37D0468  
3/16/2021  
\_\_\_\_\_  
Amy Pechacek (date)  
DWD Secretary

### FOR TTS:

DocuSigned by:  
  
06ECE012EAE2428...  
3/16/2021  
\_\_\_\_\_  
Cristina Brydges (date)  
Acting Assistant Commissioner  
TTS - Clients and Markets  
U.S. General Services Administration

**INTERGOVERNMENTAL COOPERATION ACT AGREEMENT BETWEEN THE GENERAL  
SERVICES ADMINISTRATION AND State of Wisconsin**

**PART B – Requirements & Funding Information**

**1. PURPOSE.**

This Part of the agreement serves as the funding document. It provides specific information on the requirements of the State of Wisconsin (referred to hereafter as the Receiving Entity) and identifies funds associated with the requirement to allow GSA's Technology Transformation Services to provide agile acquisition consulting services.

The U.S. General Services Administration (GSA) through its Technology Transformation Services (TTS), Office of Clients and Markets, 18F Division (18F) provides agile acquisition consulting services to Federal program managers and other leaders who need assistance in designing and managing software that use modern development techniques (e.g., agile, lean, open source). Through this agreement, TTS is providing agile acquisition consulting services to the Requesting Entity pursuant to the authorities of the Intergovernmental Cooperation Act, 31 USC 6501 et seq.).

The Requesting Entity requires the services of TTS and 18F to provide for agile acquisition consulting services.

**2. AUTHORITY.**

The authorities for the parties to enter into this agreement is the Intergovernmental Cooperation Act, 31 U.S.C. § 6505.

**3. GENERAL TERMS & CONDITIONS.**

Activities undertaken pursuant to this document are subject to the general terms and conditions set forth in Part A.

**4. PROJECT TITLE.**

Agile Acquisition for Department of Workforce Development

**5. FEES.**

Requesting Entity will pay GSA invoices on a reimbursable basis as described in Section 5 of Part A. The total estimated cost for the requested services under this order is \$1.2 million. Reimbursement for the deliverables identified in Attachment A will be provided on an actual cost basis. Actual cost means GSA's direct and indirect costs, including (1) labor costs and (2) pre-approved travel, and related expenses under this agreement.

The GSA POC will notify the Requesting Entity's POC if it appears that performance will exceed the total estimated costs under this agreement. GSA also agrees to cease or curtail performance as may be necessary until the cost issue is resolved, and the parties will decide

whether they want to amend this agreement or execute a new agreement for any additional work above the estimated agreement amount of this agreement.

## 6. PERIOD OF PERFORMANCE.

The period of performance for this order begins on the date of last signature and ends no later than 12 months from the date of last signature.

## 7. SCOPE OF SERVICES.

Please see Attachment A, Statement of Work

## 8. WRITTEN REQUEST FOR GSA SERVICES.

Please see Attachment B, Letter from Requesting Entity.

## 9. FINANCIAL

### INFORMATION Requesting

#### Entity

Please see Attachment C, Requesting Entity Accounting Information.

By signing this order, the Requesting Entity agrees that the funds are available and valid to reimburse TTS for the services provided.

#### Servicing Entity

Receiver ("18F") Treasury Account Symbol	47X45341
Receiver ("18F") Business Event Type Code	COLL
Receiver ("18F") DUNS	08-044-1469
Receiver ("18F") ALC	47-00-0016
Receiver ("18F") Additional Accounting Information	2021-F-00-285F-DS11-Q00XF000-AF151-18F Billable

**10. CONTACTS.**

**TTS**

**Technical Contact**  
Name: Cristina Brydges  
Address: 1800 F. St., NW  
Washington, DC 20405  
E-mail: cristina.brydges@gsa.gov

**Administrative Contact:**  
Ashley Owens  
1800 F St., NW  
Washington, DC 20405  
ashley.owens@gsa.gov

**RECEIVING ENTITY**

**Technical Contact**  
Name: Neeraj Kulkarni,  
CIO/ BITS Bureau Director  
Address: 201 East Washington Ave.  
Madison, WI 53703  
E-mail: neerajv.kulkarni@dwd.wisconsin.gov

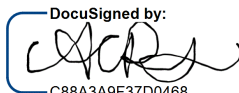
**Administrative Contact:**  
Stacia Jankowski,  
Office of Integrity and  
Accountability Director  
201 East Washington  
Avenue  
Madison, WI 53703  
stacial.jankowski@dwd.wisconsin.gov

Phone No.:


(608) 264-8763

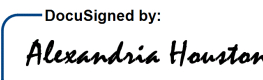
**11. APPROVALS.**

**FOR the State of Wisconsin:**

DocuSigned by:  
 3/16/2021  
C88A3A9F37D0468...  
Amy Pechacek (date)  
DWD Secretary

**FOR TTS:**

DocuSigned by:  
 3/16/2021  
06FCF012EAE2428...  
Cristina Brydges (date)  
Acting Assistant Commissioner  
TTS - Clients and Markets  
U.S. General Services Administration

DocuSigned by:  
 3/16/2021  
5C2EE581015044F...  
Alexandria Houston (date)  
OCFO  
U.S. General Services Administration

## **Attachment A, Statement of Work**

### **1.0 Background**

The U.S. General Services Administration (GSA) through its Technology Transformation Services (TTS), Office of 18F (18F) provides agile acquisition consulting services to Federal program managers and other leaders who need assistance in designing and managing software that use modern development techniques (e.g., agile, lean, open source). Through this agreement, TTS is providing agile acquisition consulting services to the State of Wisconsin (pursuant to the authorities of the Intergovernmental Cooperation Act, 31 USC 6501 et seq.).

18F builds effective, user-centric digital services focused on the interaction between Government and the people and businesses it serves. 18F helps government agencies deliver on their mission through the development of digital and web services. 18F works to transform the way the government builds and buys IT, with an emphasis on public-facing digital services. 18F provides hands-on acquisition consulting services to government program managers and other leaders who need assistance in procuring, designing, and managing software based on modern development techniques (e.g., agile, lean, open source).

### **2.1 APPROACH**

For more information on how 18F works, visit our partnership principles (<https://18f.gsa.gov/partnership-principles>).

#### **Learning through iteration**

18F takes an agile and human-centered approach to our agile acquisition work. This means that solutions emerge through experimentation and user and stakeholder feedback. This helps to ensure that deliverables and recommendations meet the needs of end users. 18F requires a commitment from its partners to work in an agile and user-centered way.

This iterative approach typically takes the form of a stakeholder interview phase, followed by a user research phase, then a check-in on what patterns we're seeing and what issues come up. Often the team will also use prototyping to illustrate ideas about where the next phase of work can go and what sort of outcomes a contractor should be aiming for.

Then 18F will divide work into short periods of iteration (often two weeks each) called sprints, in which a specific hypothesis is established and tested in order to inform the next iteration of tests. This process allows us to learn quickly and to rapidly explore pieces of the solution. This testing and feedback loop can involve direct observation or research, paper or code-based prototyping, and testing and validating features or workflows with users.

User and stakeholder research is a core part of our work. To elicit candid responses and preserve the confidentiality of the people we interview, we do not share unedited interview notes with partners.

#### **Working in the open**

18F is committed to working in the open using industry best practices, which includes the regular use of open source code. This means that all of 18F's code and work products are



developed in public view. Should any code be developed during this work, 18F will use Free and Open Source Software (FOSS) in and will contribute back to the open source community. FOSS is software that does not charge users a purchase or licensing fee for modifying or redistributing the source code. This code is dedicated fully to the public domain. 18F also publicly publishes all source code created or modified by 18F, whether developed in-house by government staff or through contracts negotiated by GSA. For more information, see the federal open source policy (<https://sourcecode.cio.gov/>).

As code is developed, 18F will collaborate with the State of Wisconsin to ensure that the code and the associated data are consistent with the State of Wisconsin's standards for security and privacy.

### **Dedicated and empowered product owner**

Achieving success on this agile acquisition engagement depends on building a close working relationship between 18F and the State of Wisconsin team. To make that happen, 18F will work with an empowered product owner from the State of Wisconsin.

An empowered product owner is someone who understands the State of Wisconsin organization, the problem we're solving, and can advocate for the solution we ultimately work towards together. This person will be responsible for establishing and carrying the long-term vision of the project, implementing a strategy, and guiding its progress, as informed by user research. This person will work closely with the 18F team as a subject matter expert on the State of Wisconsin and will help us jointly navigate the complexities of interoffice and stakeholder relationships.

Validating hypotheses with users during each iteration will also be critical to the learnings and success of this work. As such, it is important that the product owner continue to recruit users that 18F can observe and test assumptions with.

A successful product owner should also have:

- **Authority to make decisions:** The product owner removes obstacles and helps the team work as quickly as they can. They make decisions independently and have sufficient authority to make changes large and small to the project without additional review from superiors.
- **Time to work with 18F:** The product owner is just as much a part of the team as designers, researchers, and developers. They should be prepared to spend a majority of their time working on this engagement. Should the work result in the creation of a product (or the development/refinement of an existing product), the product owner will be expected to lead the product team: crafting a product vision and strategy, prioritizing work, evangelizing to stakeholders and users, working with developers and designers, and measuring results.
- **Subject matter expertise:** Public service work is detail-oriented. It's often focused in the niche areas of expertise our team doesn't have. While we bring technical expertise, the State of Wisconsin's product owner will provide guidance and expertise about the State of Wisconsin's program and users.
- **Advocacy inside their agency:** The product owner can identify stakeholders inside the State of Wisconsin and gain their support. Whether we have research results to present,

a major milestone to celebrate, or questions for another office in the State of Wisconsin, the product owner is our connection to the relevant people.

### **Long term sustainability**

A key component of 18F's mission is strengthening government technology practices in ways that last beyond our formal partnerships. The best way to ensure long term sustainability is to start planning for it from the very beginning. That means part of our work in this engagement will involve starting to evaluate any barriers to the sustainability of the solutions that may arise from this engagement and planning for how to mitigate these challenges. Additionally, a portion of every sprint of this engagement will be dedicated to long term sustainability and the State of Wisconsin ownership, including activities such as the creation of documentation, knowledge transfer, or pair-programming.

### **Support of a distributed team**

18F has a distributed workforce with staff located across the country. This means that the team for this engagement will likely not be colocated with the State of Wisconsin. Instead of working in the same physical space, we will use a wide variety of tools to collaborate with the State of Wisconsin on this work, including phone calls, emails, video conferencing, and shared digital workspaces, such as Google Docs. The project lead and account manager on this engagement will work with the State of Wisconsin to determine the best ways to collaborate and what tools both teams can utilize to achieve that. The budget for this project also includes funds for the full 18F team to travel to the State of Wisconsin for both a kick-off workshop and a wrap-up, final presentation meeting to further support this collaborative work.

The State of Wisconsin and the 18F team will also have the support of an 18F account manager for the duration of this engagement. Besides spearheading the scope and staffing for this engagement, they will provide all the support needed to allow the 18F team to focus fully on collaborating with the State of Wisconsin and delivering value. This includes travel arrangements, finances and burn tracking, collaborative tooling, agreement modifications, and other administrative details, as well as the coordination of user research, retrospectives, post mortems, and other milestone meetings necessary for working in an iterative, feedback-driven way. Additionally, the account manager will remain in contact with the State of Wisconsin throughout the engagement's duration to monitor expectations, provide customer service, and gather feedback. Account managers average eight hours of billable work per week on projects, which is accounted for in the project budget.

## **3.0 SCOPE OF WORK AND DELIVERABLES**

### **3.1. Project Scope**

During this phase, 18F will provide the following agile acquisition consulting services:

- A. Facilitate a kickoff workshop with the key stakeholders to scope and refine the problem statement or vision, establish an investigation plan, and identify the sources of information related to the procurement. These sources include people, systems, software, processes, documentation, source code, or other entities.

- B. Provide technical information and advice using qualitative and quantitative techniques to help determine project needs and scope. This includes:
  - a. Interviews: Facilitated person to person discussions with key stakeholders and users used to gather qualitative data
  - b. Observation: Witnessing a person or system at work first hand
  - c. Data analysis: Form insights based on qualitative and quantitative data
  - d. Secondary research: Review related existing materials related that may include research, manuals, reports, data, and source code as provided by the State of Wisconsin. Current state review: Examine systems, software, source code, processes, procurement documents, policies, rules, and methods currently in use
- C. Interpret and synthesize the data and research to create recommendations to ensure the procurement is aligned with the goals of the organization.
- D. Collaborate on a prioritized roadmap of the necessary actions to acquire the solution. The prioritization of this roadmap should take into account the organizational priorities, potential impact, and feasibility of the recommendations.
- E. Assist the client in determining an appropriate project plan/acquisition strategy for future product needs.
- F. Assist the client with preparation of key procurement documentation (inclusive of scope of work, evaluation criteria, cost estimates, and recommendations documents) associated with the acquisition strategy. Although the State of Wisconsin is ultimately responsible for preparing the final procurement package, 18F will review draft documents and offer comments/suggestions to increase the likelihood of success for the procurement.
- G. When appropriate, feedback on existing procurement documents. 18F will review existing procurement documents, both planned and implemented, to inform potential future acquisition activities.
- H. Collaborate on the project's technical approach and identify the proposed project architecture.
- I. If appropriate and time and budget permitting, create limited prototypes or wireframes. Prototypes can be used to test and validate assumptions with users, and to share with prospective vendors.
- J. Assist client in the evaluation of vendors' proposals. After vendors respond to the solicitation, 18F will provide technical assistance in the review of vendors' proposals to ensure that the vendors can meet the client's requirements.
- K. Ensure that any vendor that performs work on this project meets agile digital standards. After award is made, 18F will assist the client in ensuring that the vendor is adhering to commercial best practices and meets the client's requirements.
- L. Provide product, technical, design, and contracting advice to the client relating to post award management, e.g. quality assurance and surveillance with any necessary

corrective actions. As part of 18F's role in assisting the client in post-award management, 18F will provide design and technical consultation to ensure that commercial best practices are followed in the design and development of the product.

The consulting services under this agreement will not include a legal review of any requesting agency procurement. Additionally, TTS shall not be acting with procurement authority on behalf of the State of Wisconsin at any point in this engagement. The Requesting Agency is responsible for obtaining a legal review from requesting agency personnel authorized to provide legal services to the requesting agency as well as acting as its own procurement authority.

#### 4.0 DELIVERABLE TIMELINE

The Servicing Agency shall deliver to the Requesting Agency the following:

Deliverable	Details
The State of Wisconsin recruitment of users for 18F team to interview.	Immediately upon IGCA execution with the the State of Wisconsin should begin recruiting users for 18F to interview. This will include preparing users to expect 18F to reach out and schedule interviews and testing, as well as gathering of user contact details.
Materials review. Start date and kick off meeting	Immediately upon IGCA execution, the State of Wisconsin should send the 18F account manager materials pertinent to the engagement for the team to review. Both parties will also select a mutually agreeable start date and kickoff meeting date for this engagement.
Investigation activities and iterative, collaborative recommendation development.	<p>Throughout the weeks following the kickoff meeting, 18F will research the problem space, constantly sharing progress and findings and forming/refining recommendations alongside the State of Wisconsin team to ensure alignment, refining collaboratively as needed.</p> <p>This will include retrospectives scheduled at regular intervals by the 18F project lead and account manager to review the successes and challenges of the work to date, giving the teams the information they need to adjust their approach as necessary.</p>

Acquisition Workshop	Following sufficient discovery and research a week-long acquisition workshop session will occur with the core team and relevant stakeholders.
Post-Award Kick Off & Vendor Onboarding	No later than two weeks before the scheduled end of the engagement, 18F will host a remote final presentation/workshop with the core team and stakeholders to review recommendations and next steps.
Sprint Artifacts review	Once a contractor is onboarded, 18F will begin attending sprint ceremonies and will conduct reviews of all contracted work, including code, research and design artifacts, and documentation within one week of each increment delivery.
Post-Project Reflection and all engagement research and artifacts	<p>No later than one week following the final workshop/presentation 18F will hold a project reflection to review the successes and challenges of the overall project.</p> <p>18F will also provide the State of Wisconsin all of the artifacts created for the engagement, in their final form, including any presentations, reports, roadmap(s), or prototypes.</p>

## 5.0. PROJECT STATUS AND REPORTING

TTS will provide a status of key milestones on a weekly basis, including recent accomplishments, planned activities, and risks and issues. A financial accounting will be included at least monthly.

## **Attachment C, Requesting Entity Accounting Information**

**Servicing Agency IGCA#: 18FWI2100001-0001-0000**

**Client Contract Number: TBD**

Legal Business Name: Wisconsin Department of Workforce Development

Doing Business As (DBA): n/a

DUNS #: 809448012

MPIN #: WD2669405

CAGE/NCAGE #: 3LSF8

Taxpayer / EIN #: 396006449

Fed Biz Code: BETC: DISB.

### **Billing Information**

Sheila Larson

[Einvoice@dwd.wisconsin.gov](mailto:Einvoice@dwd.wisconsin.gov)

(608) 264-7841

**Department of Workforce Development**

**Secretary's Office**

201 E. Washington Avenue

P.O. Box 7946

Madison, WI 53707

Telephone: (608) 266-3131

Fax: (608) 266-1784

Email: sec@dwd.wisconsin.gov



**Tony Evers**, Governor  
**Amy Pechacek**, Secretary-designee

March 9, 2021

Mr. Dave Zvenyach  
Deputy Commissioner and  
Director of, Technology Transformation Services  
Federal Acquisition Service  
United States General Services Administration  
1800 F Street, NW  
Washington, DC 20450

Dear Mr. Zvenyach,

On behalf of the Governor of the State of Wisconsin and pursuant to the enclosed Delegation of Authority memorandum, I hereby request technical information and advice from the General Services Administration (GSA) to support Wisconsin's procurement and post award management of the Department of Workforce Development's project to update its Unemployment Insurance (UI) information technology (IT) system.

The State of Wisconsin, through the Department of Workforce Development, is responsible for the maintenance, operation, and modernization of the UI IT system. The current system is primarily written in COBOL and is hosted on a mainframe. We believe an agile acquisition approach will help Wisconsin residents access, apply for and receive unemployment benefits in a profoundly more accurate and efficient manner, allow employers to receive accurate and timely charging information, and make other improvements that will allow staff to effectively perform UI functions. I understand based on our research and discussions that 18F has the technical expertise to help DWD with this project.

I understand that GSA's Technology Transformation Services (TTS) provides agile acquisition consulting services for federal programs to help ensure that the technology systems use modern development techniques (e.g., agile, lean, open-source) and user-centered design. As TTS is a federal entity with specialized expertise in developing government digital services, TTS is uniquely positioned to provide technical information and advice to the State of Wisconsin.

For these reasons, the State of Wisconsin requests technical information and advice from the TTS's Office of 18F to support the state's procurement and post-award management of the Unemployment Insurance system. In addition, I hereby certify that the services being requested pursuant to this agreement cannot be procured reasonably and expeditiously by or through ordinary business channels.

For the State of Wisconsin:

DocuSigned by:

C98A3A0F33D0468

**Amy Pechacek**  
Secretary-designee

Enclosure