DEPARTMENT OF WAR EDUCATION ACTIVITY (DoWEA)
PERFORMANCE WORK STATEMENT (PWS)
FOR
Data, Analytics, and AI Modernization Services
Data and AI Division

1.0 Introduction

The Department of War Education Activity (DoWEA), one of two federally operated school systems, is responsible for planning, directing, coordinating, and managing pre-kindergarten through 12th-grade educational programs for the Department of War (DoW). Globally positioned, DoWEA operates 160+ accredited schools in 9 districts located in 11 foreign countries, 7 states, Guam, and Puerto Rico, serving over 67,000 students and employing approximately 15,000 staff.

The Data and AI Division leads DoWEA's data, analytics, and artificial intelligence (AI) functions. The Data and AI Division is responsible for data governance, data architecture, analytics, AI integration, data and AI literacy, and Student Information System (SIS) oversight.

1.1 Background

DoWEA is modernizing its enterprise data environment by transitioning to a cloud-based data Lakehouse. The Government has designated Microsoft Fabric and associated Microsoft services (including Power BI, Microsoft Purview, and Microsoft Entra ID) as the authorized enterprise analytics and data platform. DoWEA's current Student Information System is Follett Aspen, and SIS modernization is a component of the enterprise data modernization roadmap. This designation reflects an existing Government infrastructure decision; this PWS does not require contractors to propose or evaluate alternative platforms. The Ed-Fi Operational Data Store serves as the standardized integration layer for education data, with separate governed pipelines for non-education data domains. Both paths feed into the unified Fabric Lakehouse, which serves as the single analytical and AI-ready platform for the enterprise.

Data and AI Division requires sustained contractor support across multiple functional areas to execute this modernization, build organizational data and AI capability, and maintain operational continuity over a multi-year period.

1.2 Scope

The contractor shall provide all personnel, management, supervision, tools, equipment, and services necessary for DoWEA to procure data, analytics, AI, and related modernization services for the DoWEA Data and AI Division.

The scope encompasses the following functional areas:

- Data Architecture and Engineering
- Analytics and Business Intelligence

- Data Governance
- AI Integration and Solutions
- Data and AI Literacy
- Student Information System (SIS) Modernization Support
- Program Management, Coordination, and Transition Support

The contractor shall provide qualified personnel across all functional areas and shall be capable of scaling support up or down based on task order requirements.

1.3 Task Orders and IDIQ Structure

This is a single-award Indefinite Delivery/Indefinite Quantity (IDIQ) contract. The Government will issue task orders under this IDIQ to define specific locations, quantities, schedules, and additional or emergent Data and AI Division support requirements.

Each task order will specify applicable PWS objectives, supporting tasks, performance standards, and deliverables**.** Task orders may also define additional metrics or Acceptable Quality Levels (AQLs) unique to the work being ordered. In the event of a conflict between IDIQ PWS and a task order PWS, the task order requirements take precedence for that specific requirement.

The contractor is expected to respond to task orders in a timely manner, integrating personnel and resources as needed, while maintaining compliance with all PWS objectives, performance metrics, and Government technical and security standards.

All work performed under this contract shall comply with applicable DoW, DISA, and DoWEA policies, cybersecurity requirements, technical standards, and operational procedures.

2.0 Requirement Objectives

The following objectives define the functional areas within which the Government may issue task orders. Each objective describes the category of work, its purpose, and the types of tasks the contractor may be asked to perform. Specific tasks, deliverables, and performance periods will be defined in individual task orders.

The following listed tasks under each objective help the contractor understand the scope of potential requirements but are not exhaustive. The contractor must be prepared to develop complete solutions using a performance-based approach for each task order issued.

2.1 Data Architecture and Engineering (Objective #1)

The objective is to design, build, and maintain a modern, governed, cloud-based data architecture that enables enterprise-wide analytics, AI readiness, and data-driven decision-making across all DoWEA data domains.

The following tasks help the Contractor understand the requirements to meet the objective but are <u>not</u> exhaustive. The Contractor shall develop a complete solution using a performance-based approach.

Supporting tasks may include:

2.1.1 Design and implement data Lakehouse architecture using Microsoft Fabric, including governed data zones (Raw/Landing, Operational/ODS, Curated/Analytics)
2.1.2 Develop data ingestion pipelines using Azure Data Factory for education and non-education data domains
2.1.3 Implement Ed-Fi ODS integration using the Ed-Fi REST API for education data
2.1.4 Design and implement non-education data ingestion pipelines (HR/DCPDS, finance, logistics, IT service management)
2.1.5 Implement medallion architecture (Bronze/Silver/Gold) with schema validation, data cleansing, normalization, and transformation logic
2.1.6 Configure environment separation (Development, Test, Production) with CI/CD deployment pipelines and infrastructure-as-code
2.1.7 Implement data quality monitoring, reconciliation testing, and automated alerting
2.1.8 Design and implement disaster recovery and business continuity procedures, including rollback testing and tabletop exercises
2.1.9 Support hybrid connectivity between on-premises and cloud environments as required
2.1.10 Migrate legacy data warehouse components to the Fabric environment
2.1.11 Produce and maintain data dictionaries, data lineage documentation, and metadata catalogs
2.1.12 Register data products in Microsoft Purview with sensitivity labels, domain classifications, and ownership metadata

Performance Standards and AQLs (Objective 1)

- **Performance Standard 1.1:**
  - *Standard/Measure*: Data pipelines operate with ≥99.5% reconciliation accuracy. Curated layer data products meet <2% post-validation error rate. Data quality checks at each zone transition shall align with the VAULTIS framework (Visible, Accessible, Understandable, Linked, Trustworthy, Interoperable, Secure).
  - *AQL*: No more than two (2) validated data quality incidents per month per data domain.

- **Performance Standard 1.2**:
  - *Standard/Measure:* Data dictionaries, data lineage documentation, and metadata catalogs are maintained current within 5 business days of any schema change, pipeline modification, or new data product deployment. 100% of production data products are registered in Microsoft Purview with sensitivity labels, domain classification, and designated data owner.

- *AQL:* No more than one (1) documentation gap (missing or outdated dictionary entry, unregistered data product, or incomplete lineage record) per data domain identified during monthly review.

- **Performance Standard 1.3:**
  - *Standard/Measure:* All code and configuration changes are deployed through the established CI/CD pipeline. No direct production deployments outside the pipeline except documented emergency changes with COR approval. Development, Test, and Production environments maintain configuration parity as defined in the architecture baseline.
  - *AQL:* Zero unauthorized production deployments per month. No more than one (1) environment configuration drift finding per quarter.

- **Performance Standard 1.4:**
  - *Standard/Measure:* Disaster recovery procedures are tested at minimum once per quarter through either rollback testing or tabletop exercise. Recovery Point Objective (RPO) and Recovery Time Objective (RTO) meet thresholds defined in the task order. Rollback capability is validated after each major deployment.
  - *AQL:* 100% of scheduled DR tests are completed on schedule. Zero failed rollback attempts during validated testing.

- **Performance Standard 1.5:**
  - *Standard/Measure:* Migrated data domains achieve ≥99.5% record-level reconciliation between legacy source and Fabric target. Migration validation reports are produced for each domain and accepted by the COR prior to legacy system decommission.
  - *AQL:* 100% of migrated data domains achieve ≥99.5% record-level reconciliation between legacy source and Fabric target, validated through independent reconciliation testing prior to production use.
- **Performance Standard 1.6**:
  - *Standard/Measure:* The contractor shall produce a formal Architecture Design Document, including target-state data zone structure, data flow diagrams, integration patterns, security architecture, and environment topology, prior to implementation. Implementation shall not proceed until the Architecture Design Document is reviewed and formally accepted by the COR. Any material deviations from the accepted design during implementation require written COR approval.
  - *AQL:* Zero implementation activities initiated on any data domain prior to COR acceptance of the applicable architecture design. Zero material deviations from accepted design without documented COR approval.

- **Performance Standard 1.7:**
  - *Standard/Measure:* Production data pipelines and scheduled refresh processes maintain ≥99% availability during core business hours (Monday–Friday

0730–1600 ET). Automated alerting notifies the contractor and COR within 15 minutes of any pipeline failure or data refresh failure in production.
  - *AQL:* No more than two (2) unplanned production pipeline outages exceeding 4 hours per month. 100% of production failures generate automated alerts within the 15-minute threshold.

- **Performance Standard 1.8:**
  - *Standard/Measure:* The contractor shall produce monthly data quality reports for each data domain under active population or maintenance. Reports shall document quality metrics against established thresholds, trend analysis, identified issues, and corrective actions taken.
  - *AQL:* 100% of monthly data quality reports delivered by the 5th business day of the following month for all active data domains.

- **Performance Standard 1.9:**
  - *Standard/Measure:* No data domain or data product shall be promoted to production without completing User Acceptance Testing (UAT) with the designated Government data steward. UAT results shall be documented and the Government data steward shall provide written acceptance prior to production promotion.
  - *AQL:* Zero data domains or data products promoted to production without documented UAT completion and written Government data steward acceptance.

2.2 Analytics and Business Intelligence (Objective 2)

The objective is to modernize DoWEA's analytics and reporting environment to deliver timely, reliable, and accessible data products that support decision-making at all organizational levels.

The following tasks help the Contractor understand the requirements to meet the objective but are <u>not</u> exhaustive. The Contractor shall develop a complete solution using a performance-based approach.

Supporting tasks may include:

2.2.1 Assess the current dashboard and reporting portfolio, including usage, value, redundancy, and technical debt
2.2.2 Develop and execute a dashboard consolidation and migration plan
2.2.3 Develop enterprise semantic models and publish certified Power BI datasets
2.2.4 Build executive, operational, and compliance dashboards with <5-second load time under standard workload conditions
2.2.5 Implement row-level security (RLS) and object-level security (OLS) aligned with DoWEA's data governance framework
2.2.6 Assess and implement self-service analytics capabilities, including Copilot-assisted analytics and/or other vendor self-service analytics
2.2.7 Develop user documentation and quick-reference guides for analytics products
2.2.8 Assess and recommend Power BI licensing transition strategies (P-SKU to F-SKU)

Performance Standards and AQLs (Objective 2)

Performance Standard 2.1:

- *Standard/Measure:* Dashboards load in <5 seconds under standard workload. Analytics products reflect governed, curated data sources.
- *AQL:* No more than three (3) validated reporting accuracy or availability incidents per month.

Performance Standard 2.2:

- *Standard/Measure:* The contractor shall produce a comprehensive dashboard portfolio assessment that inventories 100% of existing dashboards and reports, including ownership, usage frequency, data sources, redundancy mapping, and technical debt classification. The assessment shall result in a consolidation and migration plan with prioritized disposition recommendations (retain, consolidate, retire, rebuild) for each item, accepted by the COR prior to execution.
- *AQL:* 100% of existing dashboards and reports are inventoried in the portfolio assessment. Consolidation plan achieves a target end state of no more than 20 strategically aligned, enterprise-level production dashboards maintained at the HQ level, with an absolute maximum of 25. Dashboards designated for retirement are decommissioned within 30 days of replacement capability reaching production. No new dashboard shall be created outside the approved portfolio without COR approval.

Performance Standard 2.3:

- *Standard/Measure:* Enterprise semantic models follow documented naming conventions, use approved curated-layer data sources exclusively, and are published as certified Power BI datasets with defined refresh schedules. No production dashboard shall consume raw or uncertified data sources.
- *AQL:* 100% of production dashboards consume only certified datasets. Zero production semantic models referencing Bronze or Silver layer data directly.

Performance Standard 2.4:

Standard/Measure: Row-level security (RLS) and object-level security (OLS) are implemented on 100% of production dashboards and datasets that contain role-restricted or organizationally scoped data, aligned with the DoWEA data governance framework and RBAC model. Security configurations are validated through testing with representative user roles prior to production deployment.

AQL: Zero unauthorized data exposure incidents attributable to missing or misconfigured RLS/OLS. 100% of security configurations validated through documented testing prior to production release.

Performance Standard 2.5:

- *Standard/Measure*: User documentation and quick-reference guides are produced for 100% of production analytics products and published to the designated Government SharePoint site. Documentation is updated within 5 business days of any material change to the associated dashboard or data product.

- *AQL:* No more than one (1) documentation gap (missing or outdated guide for a production analytics product) identified during monthly review.

2.3 Data Governance (Objective 3)

The objective is to develop, operationalize, and sustain an enterprise data governance framework that ensures data and AI are managed as strategic assets in accordance with DoW mandates, including the implementation of data security controls, data classification, and access governance within the enterprise data platform, using a capacity-building model that progressively transfers execution to Government staff.

The following tasks help the Contractor understand the requirements to meet the objective but are <u>not</u> exhaustive. The Contractor shall develop a complete solution using a performance-based approach.

Supporting tasks may include:

2.3.1 Assess current data governance maturity and develop recommendations
2.3.2 Co-develop governance artifacts with Government staff, including Data Governance Board charter, data quality standards, data classification policy, access request procedures, metadata standards, and governance review workflows
2.3.3 Provide subject-matter expertise on federal, education, and DoW data governance best practices
2.3.4 Support operationalization of governance processes (data quality reviews, access request processing, governance board facilitation support, etc.)
2.3.5 Develop data retention and lifecycle policies aligned with federal retention requirements
2.3.6 Support Master Data Management (MDM) strategy development
2.3.7 Provide governance coordination support during data population and migration activities
2.3.8 Produce governance maturity progress reports
2.3.9 Support the configuration and maintenance of Microsoft Purview governance controls for the data environment, including sensitivity labels, data domain definitions, access policies, and DLP rules
2.3.10 Support data classification and marking requirements for data products within the Fabric environment, including CUI marking, sensitivity classifications, privacy markings, and records management tags, in coordination with IT cybersecurity and compliance staff
2.3.11 Configure and validate role-based access controls (RBAC) for data access within the Fabric environment integrated with Microsoft Entra ID, aligned with the DoWEA data governance framework and RBAC model
2.3.12 Capacity-Building Requirement: The contractor shall ensure that for every governance artifact produced, at least one Government staff member is an active co-developer. The contractor shall not produce governance artifacts in isolation. The Government retains all decision-making authority.

Performance Standards and AQLs (Objective 3)

Performance Standard 3.1:

- *Standard/Measure:* Governance artifacts are co-developed with Government staff and are independently maintainable by Government staff upon delivery.
- *AQL:* 100% of governance artifacts have a designated Government co-developer and include knowledge transfer documentation.

Performance Standard 3.2:

- *Standard/Measure:* Within 15 business days of task order award, the contractor shall conduct a Governance Implementation Planning Session with the COR and designated Government staff to review the Government-provided governance checklist, identify gaps or sequencing dependencies, and produce a finalized Governance Implementation Tracker. The Government-provided checklist is the baseline. The contractor may recommend additions but shall not remove or defer items without COR approval. Following acceptance, the tracker shall be updated weekly and shall document: artifact or process name, assigned Government co-developer, current status (not started, in development, in review, accepted, operational), target completion date, and any blockers or dependencies. The tracker shall be reviewed with the COR at each monthly status meeting.
- *AQL:* Governance Implementation Planning Session completed and Governance Implementation Tracker accepted by COR within 15 business days of task order award. Tracker updated weekly with 100% accuracy against actual work status. Zero artifacts or processes stalled in the same status for more than 30 days without documented blocker and corrective action plan.

Performance Standard 3.3:

- *Standard/Measure:* Governance processes defined in the DoWEA Data Governance Framework are operationalized within the timelines established in the task order. Once operational, recurring governance activities (data quality reviews, access request processing, governance board meetings) are executed on their defined schedule. Access requests are processed within 5 business days of submission. Data quality reviews are completed on schedule for each data domain.
- *AQL:* 95% of governance board meetings conducted on schedule. 95% of data access requests processed within 5 business days. 100% of scheduled data quality reviews completed within the defined review cycle.

Performance Standard 3.4:

- *Standard/Measure:* The contractor shall deliver, at minimum, the following governance artifacts as co-developed deliverables: Data Governance Board charter, data classification policy, data quality standards, data access request procedures, metadata standards, governance review workflows, and data retention and lifecycle policies. Each artifact shall align with DoD Data Stewardship Guidebook role hierarchy and DoWEA's federated governance model.
- *AQL:* 100% of required governance artifacts delivered and COR-accepted within the timelines established in the applicable task order. Zero governance artifacts delivered

without alignment to the DoD Data Stewardship Guidebook role hierarchy unless otherwise directed by the COR.

Performance Standard 3.5:

- *Standard/Measure:* During data population and migration activities, the contractor shall ensure that governance controls are applied to all data entering the Fabric environment, including data classification, sensitivity labeling, ownership assignment, and access control configuration. No data domain shall be promoted to production in the Fabric environment without completed governance review and COR confirmation of governance compliance.
- *AQL:* Zero data domains promoted to Fabric production without completed governance review. 100% of production datasets have assigned data owner, classification label, and access controls configured prior to production use.

Performance Standard 3.6:

- *Standard/Measure:* Microsoft Purview governance controls (sensitivity labels, data domain definitions, access policies, DLP rules) and RBAC configurations for data access are configured in accordance with the DoWEA data governance framework and maintained current as the data environment evolves. Data classification and marking is completed for 100% of production data products prior to production promotion. Security configurations are reviewed and validated after each new data domain onboarding or quarterly, whichever is more frequent. Configuration changes are coordinated with CIO security and compliance staff.
- *AQL*: 100% of production data products have completed data classification and sensitivity labeling prior to production use. Zero new data domain deployments proceed to production without validated RBAC and Purview configurations. Zero configuration changes implemented without coordination with IT cybersecurity and compliance staff.

2.4 AI Integration and Solutions (Objective 4)

The objective is to support the responsible integration and implementation of artificial intelligence into DoWEA's educational and operational practices, including the design, development, and deployment of AI-driven solutions and process automations aligned with the DoWEA's AI Strategy and Guidelines.

The following tasks help the Contractor understand the requirements to meet the objective but are <u>not</u> exhaustive. The Contractor shall develop a complete solution using a performance-based approach.

Supporting tasks may include:

2.4.1 Conduct AI readiness assessments and feasibility-benefit analyses for proposed AI use cases

2.4.2 Develop technical supplements to the DoWEA AI Governance Framework, including AI tool evaluation and adoption criteria, model performance monitoring and evaluation protocols, and AI incident detection and response procedures

2.4.3 Support AI tool evaluation and pilot program design

2.4.4 Develop AI-enabled analytics capabilities (predictive modeling, forecasting, natural language query)
2.4.5 Develop a semantic model in the Lakehouse to support AI-enabled analytics
2.4.6 Support procurement readiness for AI tools, including PWS requirements language for AI-related data privacy, security, and transparency
2.4.7 Assess and recommend DoW-developed or acquired AI/LLM platforms (e.g., GenAI.mil,) for DoWEA applicability
2.4.8 Develop and/or implement AI monitoring and evaluation frameworks
2.4.9 Provide advisory services on emerging AI capabilities and their applicability to K-12 education and DoW operations
2.4.10 Design, develop, and deploy AI-driven process automations for education and business operations workflows using Government-authorized platforms (e.g., Power Automate, Power Apps, Copilot Studio)
2.4.11 Develop and implement AI-enabled solutions through the Data and AI Division Solution Delivery Process, including intake assessment, solution design, development, testing, and production deployment
2.4.12 Build and maintain AI agents, automated workflows, and intelligent document processing capabilities in coordination with IT and designated functional process owners
2.4.13 Support integration of AI capabilities into existing business processes, including requirements gathering with functional stakeholders, user acceptance testing, and post-deployment adoption support

Performance Standards and AQLs (Objective 4)

Performance Standard 4.1:

- *Standard/Measure:* AI advisory deliverables align with DoW Responsible AI principles and DAAIS AI Hierarchy of Needs.
- *AQL:* 100% of AI-related deliverables include risk assessment and responsible use considerations.

Performance Standard 4.2:

- *Standard/Measure:* AI readiness assessments, feasibility-benefit analyses, and platform evaluations shall follow a standardized evaluation framework accepted by the COR. Each evaluation shall include, at minimum: problem definition, data readiness assessment, technical feasibility analysis, estimated implementation effort, expected benefit to DoWEA mission outcomes, risk assessment aligned with DoW Responsible AI principles, and a clear recommendation (proceed, proceed with conditions, or do not proceed) with supporting rationale.
- *AQL:* 100% of AI evaluations follow the accepted evaluation framework with all required elements. Zero AI initiatives proceed to pilot or implementation without a completed and COR-accepted feasibility-benefit analysis.

Performance Standard 4.3:

- *Standard/Measure:* AI-enabled capabilities (predictive models, forecasting tools, natural language query, process automations, AI agents, or other AI driven solutions) shall not be

deployed to production without completing a structured pilot. Each pilot shall define success criteria, test with representative DoWEA data, include user acceptance testing with designated Government staff, and produce a pilot results report documenting performance against success criteria. The COR shall approve advancement from pilot to production.

- *AQL:* Zero AI capabilities deployed to production without completed pilot and COR-approved pilot results report. Pilot success criteria are met or a documented remediation plan is accepted by the COR before production deployment.

Performance Standard 4.4:

- *Standard/Measure:* The contractor shall develop technical supplements to the existing DoWEA AI Governance Framework, to include: AI tool evaluation and adoption criteria, model performance monitoring and evaluation protocols, and AI incident detection and response procedures. Technical supplements shall be co-developed with Government staff, align with the existing DoWEA governance structure, and be delivered within the timeline established in the applicable task order.
- *AQL:* 100% of AI Governance Framework technical supplements delivered, co-developed with designated Government staff, and accepted by the COR within task order timelines.

Performance Standard 4.5:

- *Standard/Measure*: AI-driven solutions and process automations developed under this objective shall follow the Data and AI Division Solution Delivery Process, including documented intake assessment, solution design review with the COR, development in the Government-designated platform environment, and user acceptance testing with the designated functional process owner. Solutions shall include technical documentation sufficient for Government staff to maintain and modify the solution independently after delivery. No AI-driven solution or automation shall be deployed to production without documented COR approval of the solution design and completed UAT.
- *AQL*: 100% of AI-driven solutions and automations follow the Data and AI Division Solution Delivery Process with all required elements. Zero solutions deployed to production without documented COR-approved solution design and completed UAT. 100% of deployed solutions include technical documentation validated as sufficient for independent Government maintenance.

2.5 Data and AI Literacy (Objective 5)

The objective is to assess workforce data and AI literacy, develop role-based literacy frameworks, and create multi-modal on-demand training content that builds organizational capacity for data-driven decision-making.

The following tasks help the Contractor understand the requirements to meet the objective but are <u>not</u> exhaustive. The Contractor shall develop a complete solution using a performance-based approach.

Supporting tasks may include:

2.5.1 Assess current data literacy readiness across DoWEA role groups (school-level staff, above-school leadership, HQ program owners, data/analytics staff, regional education researchers)
2.5.2 Evaluate and recommend enterprise data literacy frameworks (e.g., DQC Roadmap to Data-Informed Decision-Making)
2.5.3 Develop multi-year data literacy roadmaps with learning objectives, competency progressions, and delivery models by role group
2.5.4 Design and develop on-demand, role-based data literacy training modules using multiple delivery modes (interactive e-learning, written articles, voice-over slide presentations, short-form video) for Data and AI Division -owned literacy domains (e.g. data governance awareness, data quality fundamentals, reading and interpreting dashboards, data stewardship responsibilities, data privacy and responsible handling, introduction to AI literacy for data practitioners)
2.5.5 Develop facilitator guides to enable Government staff to deliver instructor-led versions
2.5.6 Pilot training modules and incorporate feedback before final delivery
2.5.7 Publish all materials to Government SharePoint with unlimited Government rights

2.5.8 Ownership Requirement: The Government shall receive unlimited rights in all training materials, content, facilitator guides, source files, and associated intellectual property in accordance with applicable FAR and DFARS rights in data provisions.

2.5.9 Instructional Expertise Requirement: Personnel performing data and AI literacy work under this objective shall possess demonstrated expertise in adult learning theory (andragogy), instructional design methodology, and competency-based education principles. Training content shall be designed using evidence-based instructional practices appropriate to adult professional learners in a federal workplace environment. The contractor shall not assign personnel to literacy task orders whose primary expertise is technical data or AI skills without accompanying instructional design qualifications.

Performance Standards and AQLs (Objective 5)

Performance Standard 5.1:

- *Standard/Measure:* Training modules are role-appropriate, aligned to the adopted literacy framework, and validated through pilot testing.
- *AQL*: Pilot participant satisfaction rating of ≥80% and Government acceptance of all modules prior to final publication.

Performance Standard 5.2:

- *Standard/Measure:* The contractor shall conduct a data and AI literacy readiness assessment covering all DoWEA role groups identified by the COR (at minimum: school-level staff, above-school leadership, HQ program owners, data/analytics staff, and regional education researchers). The assessment shall use a standardized instrument accepted by the COR and shall document current competency levels, priority skill gaps, and recommended learning priorities for each role group.

- *AQL:* Readiness assessment covers 100% of COR-designated role groups. Assessment delivered and accepted by COR within the timeline established in the applicable task order.

Performance Standard 5.3:

- *Standard/Measure:* The contractor shall develop a multi-year data and AI literacy roadmap aligned with the DoWEA-adopted literacy framework structure. The roadmap shall include, for each role group: learning objectives, competency progressions, delivery models (on-demand, instructor-led, or blended), sequencing, and estimated level of effort. The roadmap shall be independently executable by Government staff upon delivery.
- *AQL:* Literacy roadmap covers all COR-designated role groups with all required elements. Roadmap accepted by COR and validated as independently executable through Government staff review.

Performance Standard 5.4:

- *Standard/Measure:* Facilitator guides shall be developed for each training module designated for instructor-led delivery. Each guide shall include: session objectives, detailed facilitation instructions, timing guidance, discussion prompts, activity instructions, required materials, and troubleshooting guidance. Facilitator guides shall enable a Government staff member or Educational Technologist with no prior involvement in module development to deliver the training independently.
- *AQL:* 100% of instructor-led training modules have an accompanying facilitator guide. Facilitator guides are validated through a dry-run delivery by a Government staff member not involved in module development, with successful delivery confirmed by the COR.

Performance Standard 5.5:

- *Standard/Measure:* All finalized training materials, facilitator guides, source files, and associated content are published to the Government-designated SharePoint site within 5 business days of COR acceptance. Published materials include editable source files (not PDF-only) to enable Government modification and updates and are Section 508 compliant. Materials are organized according to the Data and AI Division SharePoint information architecture.
- *AQL:* 100% of COR-accepted training materials published to Government SharePoint within 5 business days of acceptance. Zero materials published without editable source files.

Performance Standard 5.6:

- *Standard/Measure:* On-demand data and AI literacy modules shall be developed using multiple delivery modes to maximize accessibility and engagement. At minimum, each Data and AI Division literacy domain shall include content in at least two of the following formats: interactive e-learning (Articulate Storyline, Rise, or equivalent), written articles or reference guides, voice-over slide presentations, or short-form video. All on-demand modules shall be designed for self-paced consumption, Section 508 compliant, and published to the Government-designated SharePoint site in formats playable without specialized software or contractor-hosted platforms.

- *AQL:* 100% of Data and AI Division literacy domains have on-demand content available in at least two distinct delivery modes. Zero modules require contractor-hosted platforms or proprietary software for end-user access.

2.6 Student Information System (SIS) Modernization Support (Objective 6)

The objective is to provide technical support for Student Information System data operations, Ed-Fi integration, data quality management, and continuity of SIS-related data services across the period of performance.

The following tasks help the Contractor understand the requirements to meet the objective but are <u>not</u> exhaustive. The Contractor shall develop a complete solution using a performance-based approach.

Supporting tasks may include:

2.6.1 Support Ed-Fi ODS implementation, including Aspen-to-Ed-Fi export mapping, descriptor customization, and API integration
2.6.2 Provide technical support for optimization of the current Student Information System (DSIS/Follett Aspen), including configuration improvements, data workflow enhancements, reporting optimization, and resolution of system-level data issues in coordination with the SIS vendor
2.6.3 Develop SIS data quality evaluation program and review processes
2.6.4 Support data migration planning from current SIS to successor system
2.6.5 Support Ed-Fi Data Management Service (DMS) migration planning when the DMS reaches production readiness

Performance Standards and AQLs (Objective 6)

Performance Standard 6.1:

- *Standard/Measure:* Ed-Fi integrations use the REST API exclusively (no direct database connections). SIS support deliverables align with Ed-Fi Data Standard specifications.
- *AQL:* 100% of Ed-Fi integrations use the REST API

Performance Standard 6.2:

- *Standard/Measure:* Ed-Fi ODS implementation shall achieve validated data synchronization for 100% of education data entities identified in the task order scope. Each data entity shall complete a validation cycle that includes: source-to-ODS mapping verification, descriptor alignment confirmation, API synchronization testing, and reconciliation against source system counts and values. Validation results shall be documented and accepted by the COR for each data entity before it is considered complete.
- *AQL:* 100% of in-scope data entities complete the full validation cycle and are accepted by the COR. No data entity is marked complete without documented reconciliation results meeting the ≥99.5% accuracy threshold.

Performance Standard 6.3:

- *Standard/Measure:* The contractor shall develop an SIS data quality evaluation program aligned to DoWEA data governance standards that defines acceptable quality thresholds, validation rules, and review procedures for each major SIS data domain (enrollment, demographics, attendance, grades, special programs). Program implementation shall include a recurring program review process with defined review cycles, responsible parties, and escalation procedures. Standards and review processes shall be co-developed with Government staff and independently executable by Government staff upon delivery.
- *AQL:* SIS data quality evaluation program covers 100% of major SIS data domains as defined by the COR. Program review process is validated through at least one Government-led review cycle prior to task order completion.

2.6.4 SIS Expertise Requirement: Personnel performing SIS modernization support under this objective shall possess demonstrated experience in student information system data management, Ed-Fi data standard integration, and education data interoperability. Experience with the DoWEA current SIS platform (Follett Aspen) is beneficial, particularly for early task orders focused on the existing environment. As the SIS environment is part of DoWEA's ongoing data modernization, experience with comparable student information systems or Ed-Fi-aligned data platforms is equally relevant to this requirement. The Government does not require, and shall not evaluate proposals on the basis of, experience with any single named SIS product.

2.7 Program Management, Coordination, and Transition Support (Objective 7)

The objective is to provide program management, cross-functional coordination, and transition support to the Data and AI Division in executing the DoWEA Data Modernization Strategy and AI Strategy.

The following tasks help the Contractor understand the requirements to meet the objective but are <u>not</u> exhaustive. The Contractor shall develop a complete solution using a performance-based approach.

Supporting tasks may include:

2.7.1 Provide a Program Manager as the single point of contact for all active task orders
2.7.2 Develop and maintain integrated master schedules, risk and issue logs, and milestone tracking across concurrent task orders
2.7.3 Provide program planning and execution support for data, analytics, and AI initiatives, including resource planning and schedule development
2.7.4 Support adoption and implementation activities associated with governance, analytics modernization, and AI integration
2.7.5 Support development of communication materials for Data and AI Division initiatives
2.7.6 Coordinate with Government-designated stakeholders across functional areas as directed by the COR
2.7.7 Prepare briefing materials, decision papers, and status reports for senior leadership
2.7.8 Provide transition and knowledge transfer services, including technical operations manuals, training, and parallel operations support

Performance Standards and AQLs (Objective 7)

Performance Standard 7.1:

- *Standard/Measure:* Status reports are submitted on time with complete and accurate information. Deliverables meet agreed-upon timelines.
- *AQL:* 95% on-time delivery of status reports and milestone deliverables.

Performance Standard 7.2:

- *Standard/Measure:* The Program Manager shall maintain an integrated master schedule, risk register, and issue log across all active task orders, updated weekly. Risks shall be identified with probability, impact, and mitigation plan. Issues shall include severity, assigned owner, and target resolution date. The Program Manager shall proactively identify schedule conflicts, resource constraints, and cross-task-order dependencies and present mitigation options to the COR before they impact delivery timelines.
- *AQL:* Integrated master schedule, risk register, and issue log updated weekly with 100% accuracy against actual status. Zero schedule impacts that were foreseeable and not flagged to the COR at least 10 business days in advance.

Performance Standard 7.3:

- *Standard/Measure:* Monthly status reports shall include, at minimum: task order status summary by workstream, progress against milestones, updated risk and issue status, financial status (hours burned versus estimated), upcoming 30-day look-ahead, and any decisions or approvals needed from the Government. Briefing materials and decision papers shall be submission-ready for senior leadership without Government rework.
- *AQL:* 100% of monthly status reports contain all required elements. No more than one (1) status report per quarter returned by the COR for substantive correction or incompleteness.

Performance Standard 7.4:

- *Standard/Measure:* The contractor shall deliver a Transition Plan no later than 90 days before the end of the IDIQ or final active task order. The Transition Plan shall include: technical operations manuals for all systems and processes maintained by the contractor, documentation of all active configurations and credentials, knowledge transfer schedule with designated Government recipients, training completion records with competency assessments for each Government recipient, and a parallel operations period of no less than 30 days during which Government staff operate with contractor observation and support. A readiness review shall be conducted at approximately 60 days before contract end to assess Government staff readiness and identify areas requiring additional support. Knowledge transfer is complete when designated Government staff demonstrate independent operational capability for each transitioned function. The contractor shall provide 30 calendar days of on-call support following formal handoff for escalation of critical issues only.
- *AQL:* Transition Plan delivered no later than 90 days before contract or final task order end. Readiness review conducted at the 60-day mark. 100% of transitioned functions validated through independent Government staff execution during the parallel operations

period. 100% of Government recipients have documented training completion records with competency assessments.

3.0 Constraints

The following are constraints associated with this PWS. Constraints shall be complied entirely during the duration of the contract unless otherwise stated by the Government.

3.1 Non-Personal Services

This is a non-personal services contract. The Government will not exercise direct supervision over contractor personnel. The contractor is responsible for managing its personnel, work schedules, and work execution to meet the requirements of individual task orders.

3.2 Inherently Governmental Functions

The contractor shall not make final policy determinations, approve governance decisions, or exercise inherently governmental authority. All contractor recommendations, analyses, assessments, and deliverables are advisory in nature and subject to Government review and approval. The Government retains all decision-making authority regarding data governance policies, AI adoption decisions, technology selections, procurement recommendations, and organizational strategies. This constraint applies across all functional areas and task orders issued under this IDIQ.

3.3 Government-Designated Platform

The Government has designated Microsoft Fabric and associated Microsoft services (including Power BI, Microsoft Purview, and Microsoft Entra ID) as the authorized enterprise analytics and data platform. This designation reflects an existing Government infrastructure investment and decision. The contractor shall perform all work within the Government-designated platform environment. This PWS does not require the contractor to propose, evaluate, or implement alternative data platforms. The contractor shall not stand up separate infrastructure outside the Government-designated environment without written COR approval.

3.4 DevSecOps and Configuration Management

The contractor shall implement infrastructure-as-code and CI/CD deployment pipelines for all Fabric artifacts, data pipelines, and transformation logic. All transformation logic, pipeline configurations, and infrastructure-as-code templates shall be maintained under version control in a Government-designated repository. The contractor shall implement monitoring, logging, error handling, and alerting for all production data pipelines, dashboards, and data products. DevSecOps documentation shall be maintained current and included in all transition and knowledge transfer deliverables.

3.5 User Acceptance Testing

No data domain, data product, dashboard, analytics product, or AI capability shall be promoted to production without completing User Acceptance Testing (UAT) with the designated Government data steward or functional owner. UAT results shall be documented and the designated Government representative shall provide written acceptance prior to production promotion. This requirement applies across all functional areas.

3.6 Security Requirements

All contractor personnel accessing DoWEA systems or data shall meet the following requirements:

- Be United States citizens
- Meet IT Level II position requirements (or as determined by the Government for specific task orders)
- Maintain favorable background investigations (NAC/NACLAC or equivalent)
- Be CAC/PIV eligible and maintain valid credentials throughout the period of performance
- Complete annual DoD Cyber Awareness Challenge training (including elevated privilege requirements where applicable)
- Sign user device acceptance agreements and elevated privileges agreements as required
- Comply with Controlled Unclassified Information (CUI) handling requirements
- Support DoD Zero Trust architecture principles in all work performed
- The contractor shall not store, transfer, or process DoWEA data outside of Government-authorized environments. The contractor must sign all required security agreements prior to accessing any DoWEA system or data. Relevant Microsoft certifications are preferred for technical staff (e.g., Microsoft Certified: Fabric Analytics Engineer, Azure Solutions Architect, Power BI Data Analyst).

3.6.1 Security Clearance/Privacy Requirements

3.6.1.1 All contract employees providing services under this contract/Performance of Work Statement (PWS) will Position Designation: Non-Critical Sensitive; Risk Level: Moderate Risk. For Automatic Data Processing (ADP) / Information Technology (IT) Level II designations, require a Tier 3 background investigation, formerly known as a National Agency Check with Law and Credit (NACLC) prior to performing on this contract.

3.6.1.2 These positions are considered ADP Level II positions and require access and processing of proprietary/sensitive data on US Government furnished and approved information systems. Compliance with DoW security policies, training requirements instructions, and regulations are mandatory for these positions supporting this contract and performance of work statement.

3.6.1.3 In accordance with DoWM 5200.01-V3, DoW civilians, military members, and onsite support contractors with access to classified/sensitive information shall complete Information Security refresher training annually.

3.6.1.4 Contractor personnel shall sign a SF 312 Non-Disclosure Agreement and computer/Internet access agreements.

3.6.1.5 All Contractor personnel shall possess the required security certifications and

training in accordance with DoW Directive 8570.01.

3.6.1.6 All personal identity verification (PIV) cards, credentials, or badges issued by or through DoWEA shall be returned to DoWEA (COR/SMD), upon termination/completion of this contract or when a contract employee ceases work on this contract, whichever comes first.

3.6.1.7 The Contractor's facility security officer shall provide a visit access request via Defense Information Security System (DISS), which replaced the Joint Personnel Adjudication System (JPAS) as the System of Record to SMO Code: HE12544, for the period of performance, prior to any work on a DoWEA contract. Security Management Division POC Information: Scott M. Smith Phone: 571-372-0768.

3.6.1.8 School-based personnel shall also meet Child Care Background Check requirements per DoWI 1402.05 and DD 2981.

3.7 Cybersecurity Compliance Requirements—The Contractor shall:

3.7.1 Implement and maintain NIST SP 800 171 controls, conduct continuous monitoring, and provide monthly security status reports.

3.7.2 Encrypt all data in transit and at rest using FIPS 140 2/140 3 validated cryptography; enforce MFA and Role Based Access Control (RBAC).

3.7.3 Maintain audit logging, vulnerability management (including regular scanning and patching), configuration management, and incident response, including 72-hour breach notification to the Contracting Officer (KO) and DoWEA Cyber.

3.7.4 Submit and maintain Supplier Performance Risk System (SPRS) scores in accordance with DFARS requirements and provide access for Government or authorized third-party assessors.

3.5.4.5 Ensure all subcontractors handling DoWEA data comply with DFARS 252.204 7012, Cybersecurity Maturity Model Certification (CMMC), and all related cybersecurity requirements.

3.5.5.6 Utilize for cloud-based services FedRAMP Moderate/High or DoW-authorized cloud environments for storing/processing CUI and provide all required documentation including data residency/ sovereignty details.

3.5.6.7 Comply with applicable privacy/security standards for student data and execute the DoWEA Data Privacy Agreement (DPA) when applicable.

- *Note*: DoWEA/DoW reserves the right to require removal of Contractor personnel whose actions conflict with Government interests.

3.8 Cybersecurity Maturity Model Certification (CMMC) Requirements

The Contractor shall comply with the CMMC 2.0 requirements applicable to this acquisition. CMMC level applicability is based on whether or not the Contractor handles Federal Contract Information (FCI) or Controlled Unclassified Information (CUI). Note: The Government may require proof of CMMC certification, assessment results, or affirmation statements as part of contract award or surveillance.

- Level 1 (Foundational): Applies to contractors that do not process, store, or transmit CUI and only handle Federal Contract Information (FCI). Contractors shall implement the 17 basic safeguarding requirements in FAR 52.204 21.
- Level 2 (Advanced): Applies if the contractor will process, store, or transmit CUI and requires implementation of NIST SP 800 171 security controls.

3.9 Section 508 Compliance—The Contractor shall:

3.9.1 *Background*: Section 508 of the Rehabilitation Act, as amended by the Workforce Investment Act of 1998 (P.L. 105-220) requires Federal agencies that develop, procure, maintain, or use information and communication technology (ICT) to ensure they are accessible to people with disabilities. Federal employees and members of the public who have disabilities shall have access to and use of information/data that is comparable to people without disabilities.

3.9.2 *Requirement*: Ensure that products, platforms, and services delivered as part of this work statement that are ICT or contain ICT conform to the Revised 508 Standards, 36 C.F.R. § 1194.1 & Apps. A, C & D which are located at the following URL: https://www.access-board.gov/guidelines-and-standards/communications-and-it/about-the-ict-refresh/final-rule/text-of-the-standards-and-guidelines.

3.9.3 *ARS*: See the attached ICT Accessibility Requirements Statement (ARS). All functional performance criteria apply when using an alternative design or technology that achieves substantially equivalent or greater accessibility and usability by individuals with disabilities, than would be provided by conformance to one or more of the requirements in Chapters 4-6 of the Revised 508 Standards or when Chapters 4-6 do not address one or more functions of ICT. *Note the guidance in the table below*:

Applicable Requirements	Directions
Software Features and Components	Applies to all WCAG Level AA Success Criteria, 502 Inter-operability with Assistive Technology, and 503 Applications.
Hardware Features and Components	All requirements apply.
Support Services and Documentation	All requirements apply.
Outputs/Deliverables	Ensures that outputs/deliverables do <u>not</u> adversely affect accessibility features of the existing EIT technologies.

3.10 Period of Performance

The IDIQ contract shall have a base period of one (1) year with four (4) one-year option periods, for a total potential period of performance of five (5) years. Individual task orders may span the base or option periods as specified at the time of issuance but shall not extend beyond the IDIQ period of performance.

3.11 Work Hours and Place of Performance

Work shall be performed at DoWEA Headquarters, 4800 Mark Center Dr., Alexandria, VA 22350, or at the Americas Regional Office, Peachtree City, GA, as designated per task order. The Contracting Officer's Representative may authorize performance at the contractor's facility for specific task orders or specific labor categories where on-site presence is not required for the work being performed. Specific work location requirements, including any remote work authorizations, will be defined in individual task orders.

Core business hours are Monday through Friday, 7:30 AM – 4:00 PM Eastern Time, excluding federal holidays. Contractor personnel authorized to work at the contractor's facility shall be available during core business hours for Government coordination and shall be available for on-site presence when directed by the COR with reasonable notice.

3.12 Federal Holidays: The Contractor shall observe US Federal holidays in accordance with Government established schedules, which are New Year's Day, Martin Luther King, Jr. Day, President's Day, Memorial Day, Juneteenth, Independence Day, Labor Day, Columbus Day, Veterans Day, Thanksgiving, and Christmas Day.

3.13 Travel
Travel may be required to DoWEA Headquarters, regional offices, or school sites with prior Government approval. Travel shall comply with the Joint Travel Regulations (JTR) and applicable FAR requirements. Travel costs shall be handled as specified in individual task orders.

3.14 Key Personnel
The contractor shall designate key personnel for the IDIQ contract, including at minimum a Program Manager who serves as the single point of contact for all task orders. Additional key personnel may be designated at the task order level based on the scope of work. The contractor shall notify the Contracting Officer's Representative (COR) at least 14 calendar days in advance of any proposed change to key personnel.

3.12 Labor Categories

The contractor shall provide qualified personnel in the labor categories defined in Attachment 5-Labor Category Descriptions. Labor categories span all functional areas and include roles ranging from senior advisory to entry-level directed support. The contractor shall propose fully burdened hourly rates for each labor category. Specific labor category requirements for each engagement will be defined at the task order level.

3.13 Contractor Personnel Performance

The Contracting Officer may require the Contractor to remove personnel for reasons involving unacceptable performance, misconduct, security concerns, failure to meet contractual qualifications, or actions that adversely affect mission accomplishment.

The Government shall provide written notification to the contractor identifying the performance deficiency. The contractor shall propose a replacement with qualifications equal to or greater than the individual being replaced within 10 business days of notification. Replacement personnel are subject to the same security and qualification requirements specified in this PWS. This provision does not create a personal services relationship between the Government and contractor personnel.

3.14 Quality Control Plan

The contractor shall develop and submit a Quality Control Plan (QCP) within 14 calendar days of IDIQ award and shall update it within 14 calendar days of any material change in approach, key personnel, or task order portfolio. The QCP shall describe the contractor's internal processes for ensuring deliverable quality, schedule adherence, performance standard compliance, and timely identification and resolution of performance issues across all active task orders. At a minimum, the QCP shall address: deliverable review and inspection procedures prior to Government submission; internal performance monitoring against the standards in Section 2.0 and the Performance Requirements Summary; defect identification, root cause analysis, and corrective action procedures; and the contractor's approach to managing quality across concurrent task orders. The Government's quality assurance approach is described in Section 7.1 (Quality Assurance Surveillance Plan). The contractor's QCP and the Government's QASP are independent and complementary.

3.15 Data Rights and Ownership

All deliverables, including data products, data pipelines, dashboards, training materials, documentation, code, scripts, configurations, automation, and other work products developed under this contract, shall be delivered to the Government. The Government shall have unlimited rights to use, modify, reproduce, release, and distribute such work products in accordance with applicable FAR and, where applicable, DFARS data rights provisions.

The Contractor shall not assert proprietary rights that are inconsistent with the Government's rights in contract-developed work products. Nothing in this section affects the Contractor's ownership of preexisting intellectual property, commercial software, open-source software, background technology, or independently developed materials incorporated into the work.

The Contractor shall protect Government data and, upon completion or termination of the task order, return or securely destroy all Government data in its possession, except as otherwise required by law or authorized in writing by the Government.

4.0 Government-Furnished Resources

The Government will provide the contractor with the property, equipment, and/or information necessary for performance of this requirement as identified in this PWS or task order.

4.1 Government-Furnished Property/Equipment (GFP/GFE)

The Government shall provide the following, as applicable to specific task orders:

- Access to the Microsoft Fabric environment (appropriate permissions per task order)
- Access to the Ed-Fi ODS (Development and Production environments)
- Access to Power BI workspaces
- Access to designated source systems as required for data population or integration work
- Applicable licensing for Microsoft Fabric and Power BI (Government-owned)
- Government-issued equipment as applicable for on-site work
- Government-issued CAC/PIV credentials for authorized contractor personnel
- Access to identity and security infrastructure as required
- The contractor shall not be provided Government-furnished equipment for remote work unless specified in a task order or required for network access. The contractor shall provide all equipment, software, and tools necessary to perform the work remotely.

4.2 Government-Furnished Information/Materials (GFI/GFM)

The Government will provide access to the following via the COR:

- DoWEA Data Modernization Strategy, AI Strategy, and Data Governance Framework documents
- Relevant architecture documentation and diagrams
- Organizational charts, workforce composition data, and professional learning structures
- Ed-Fi issue tracker and open items log
- Existing governance artifacts, policies, and standards
- Dashboard ownership and maintenance records
- Access to Government staff for coordination, interviews, and working sessions

5.0 Contract Data Deliverables

The following deliverables apply at the IDIQ contract level. Additional deliverables specific to each engagement will be defined in individual task orders.

Milestone/Deliverable	Format	Copies	PWS Ref	Frequency/Delivery	Submit To
Quality Control Plan	Word	1	3.14	Within 14 calendar days of contract award	COR
Monthly Status Report	Word	1	2.7	Monthly, by 5th business day	COR
Monthly Data Quality Reports (per active domain)	Word	1	2.1	Monthly, by 5th business day	COR
Governance Implementation Tracker	Excel	1	2.3	Weekly updates; reviewed at monthly status	COR
Task Order Deliverables	Per TO	Per TO	Per TO	As defined in each task order PWS	COR
Transition Plan	Word	1	2.7	90 days before contract/TO end	COR
Training Completion Records	Word	1	2.7	With Transition Plan	COR

Lessons Learned Report	Word	1	2.7	With final handoff	COR

6.0 Definitions

- Contracting Officer Representative (COR): An individual designated and authorized in writing by the Contracting Officer to perform specific technical or administrative functions, including surveillance and inspection of contractor performance.
- CDAO: Chief Data and Artificial Intelligence Officer. The DoWEA senior official responsible for data, analytics, and AI functions.
- Ed-Fi: An open-source K-12 education data standard maintained by the Ed-Fi Alliance, defining how education data is structured and exchanged.
- ODS: Operational Data Store. A database that receives standardized education data through the Ed-Fi API.
- DMS: Data Management Service. The Ed-Fi Alliance's cloud-native successor to the ODS, currently in development.
- Fabric: Microsoft Fabric. An integrated data platform combining data storage, engineering, integration, analytics, and AI capabilities. Designated by the Government as DoWEA's authorized enterprise data platform.
- VAULTIS: Visible, Accessible, Understandable, Linked, Trustworthy, Interoperable, Secure. The seven data quality goals from the 2020 DoD Data Strategy.
- DAAIS: Data, Analytics, and AI Adoption Strategy. The 2023 DoD strategy that supersedes the prior Data Strategy and AI Strategy.
- Medallion Architecture: A data organization pattern with three layers: Bronze (Raw/Landing), Silver (Operational/Cleansed), and Gold (Curated/Analytics).
- Task Order: An individual order issued against the IDIQ contract defining specific work, deliverables, timeline, and funding.
- Crown Jewels: The most mission-critical data domains requiring the strongest security and governance controls: Student/Education Data, HR/Personnel Data, Financial Data, and IT Service/Operational Data.
- UAT: User Acceptance Testing. Formal testing conducted by designated Government staff to validate that a deliverable meets requirements before production promotion.

7.0 Performance Requirement Summary (PRS)

The following summarizes the performance standards, acceptable quality levels, and methods of surveillance for each objective. Additional performance requirements may be defined at the task order level.

Objective	Performance Standard	AQL	Method of Surveillance	Inspector
PS 1.1	≥99.5% reconciliation accuracy; <2% post-validation error rate; data quality checks aligned with VAULTIS framework	≤2 validated data quality incidents per month per data domain	Monthly quality reports, spot checks	COR

PS 1.2	Data dictionaries, lineage documentation, and metadata catalogs maintained current within 5 business days of any schema change; 100% of production data products registered in Microsoft Purview with sensitivity labels, domain classification, and data owner	≤1 documentation gap per data domain identified during monthly review	Monthly review	COR
PS 1.3	All code and configuration changes deployed through CI/CD pipeline; no unauthorized direct production deployments except documented emergency changes with COR approval; Dev/Test/Prod environment configuration parity maintained	Zero unauthorized production deployments per month; ≤1 environment configuration drift finding per quarter	Pipeline logs, quarterly audit	COR
PS 1.4	Disaster recovery procedures tested at minimum once per quarter; RPO and RTO meet task order thresholds; rollback capability validated after each major deployment	100% of scheduled DR tests completed on schedule; zero failed rollback attempts during validated testing	Test reports	COR
PS 1.5	Migrated data domains achieve ≥99.5% record-level reconciliation between legacy source and Fabric target; migration validation reports produced and COR-accepted prior to legacy system decommission	100% of migrated data domains achieve ≥99.5% reconciliation, validated through independent testing prior to production use	Reconciliation reports	COR
PS 1.6	Architecture Design Document produced and COR-accepted prior to implementation; no implementation without acceptance; material deviations require written COR approval	Zero implementation activities initiated prior to COR acceptance; zero material deviations without documented COR approval	Design review records	COR
PS 1.7	Production data pipelines and scheduled refresh processes maintain ≥99% availability during core business hours (Mon–Fri 0730–1600 ET); automated alerting within 15 minutes of any production pipeline or data refresh failure	≤2 unplanned production pipeline outages exceeding 4 hours per month; 100% of failures generate alerts within 15-minute threshold	Monitoring dashboards	COR
PS 1.8	Monthly data quality reports produced for each data domain	100% of monthly data quality reports	Report review	COR

	under active population or maintenance, documenting quality metrics, trend analysis, identified issues, and corrective actions	delivered by the 5th business day of the following month for all active data domains		
PS 1.9	No data domain or data product promoted to production without completing UAT with designated Government data steward; UAT results documented with written acceptance prior to production promotion	Zero data domains or data products promoted to production without documented UAT completion and written Government data steward acceptance	UAT records	COR
PS 2.1	Dashboards load in <5 seconds under standard workload; analytics products reflect governed, curated data sources	≤3 validated reporting accuracy or availability incidents per month	Monthly review, user feedback	COR
PS 2.2	Comprehensive dashboard portfolio assessment inventorying 100% of existing dashboards and reports; consolidation and migration plan with prioritized disposition recommendations	100% inventoried; target ≤20 enterprise-level production dashboards (max 25); no new dashboards without COR approval; retired dashboards decommissioned within 30 days of replacement	Inventory review	COR
PS 2.3	Enterprise semantic models follow documented naming conventions, use approved curated-layer data sources exclusively, and are published as certified Power BI datasets with defined refresh schedules	100% of production dashboards consume only certified datasets; zero production semantic models referencing Bronze or Silver layer data directly	Dataset audit	COR
PS 2.4	RLS and OLS implemented on 100% of production dashboards and datasets containing role-restricted or organizationally scoped data; security configurations validated through testing with representative user roles prior to production deployment	Zero unauthorized data exposure incidents attributable to missing or misconfigured RLS/OLS; 100% of security configurations validated through documented testing	Security testing	COR

PS 2.5	User documentation and quick-reference guides produced for 100% of production analytics products and published to Government SharePoint; updated within 5 business days of any material change	≤1 documentation gap identified during monthly review	Monthly review	COR
PS 3.1	Governance artifacts co-developed with Government staff and independently maintainable by Government staff upon delivery	100% of governance artifacts have a designated Government co-developer and include knowledge transfer documentation	Artifact review, staff assessment	COR
PS 3.2	Governance Implementation Planning Session within 15 business days of task order award; Governance Implementation Tracker produced, updated weekly with 100% accuracy; documents artifact status, co-developer, dates, blockers	Session completed and tracker accepted within 15 business days; weekly updates 100% accurate; zero artifacts stalled >30 days without documented blocker and corrective action plan	Tracker review	COR
PS 3.3	Governance processes operationalized within task order timelines; recurring activities executed on defined schedule; access requests processed within 5 business days; data quality reviews completed on schedule	95% of governance board meetings on schedule; 95% of data access requests within 5 business days; 100% of scheduled data quality reviews completed	Process logs	COR
PS 3.4	Complete governance artifact set delivered as co-developed deliverables: Data Governance Board charter, data classification policy, data quality standards, data access request procedures, metadata standards, governance review workflows, data retention and lifecycle policies; aligned with DoD Data Stewardship Guidebook role hierarchy	100% of required governance artifacts delivered and COR-accepted within task order timelines; zero artifacts without DoD Data Stewardship Guidebook alignment unless COR-directed	Artifact review	COR
PS 3.5	Governance controls applied to all data entering Fabric environment during population and migration:	Zero data domains promoted to Fabric production without	Migration records	COR

	data classification, sensitivity labeling, ownership assignment, and access control; no production promotion without completed governance review and COR confirmation	completed governance review; 100% of production datasets have assigned data owner, classification label, and access controls configured		
PS 3.6	Purview controls, data classification, and RBAC configured per governance framework; validated after each domain onboarding or quarterly	100% production data products classified and labeled; zero deployments without validated RBAC and Purview; zero changes without CIO coordination	Configuration review, quarterly audit	COR
PS 4.1	AI advisory deliverables align with DoWEA AI Strategy and AI Guidelines	100% of AI-related deliverables include risk assessment and responsible use considerations	Deliverable review	COR
PS 4.2	AI readiness assessments, feasibility-benefit analyses, and platform evaluations follow standardized COR-accepted evaluation framework including: problem definition, data readiness, technical feasibility, implementation effort, expected benefit, risk assessment, and clear recommendation with rationale	100% of AI evaluations follow accepted framework with all required elements; zero AI initiatives proceed to pilot or implementation without COR-accepted feasibility-benefit analysis	Evaluation records	COR
PS 4.3	AI-enabled capabilities (predictive models, forecasting tools, natural language query, process automations, AI agents, or other AI-driven solutions) shall not be deployed to production without completing a structured pilot with defined success criteria, representative DoWEA data, UAT with Government staff, and pilot results report	Zero AI capabilities deployed to production without completed pilot and COR-approved pilot results report; pilot success criteria met or documented remediation plan COR-accepted before production deployment	Pilot reports	COR
PS 4.4	Technical supplements to DoWEA AI Governance Framework co-developed with Government staff:	100% of AI Governance Framework technical	Deliverable review	COR

	AI tool evaluation and adoption criteria, model performance monitoring and evaluation protocols, AI incident detection and response procedures	supplements delivered, co-developed with Government staff, and COR-accepted within task order timelines		
PS 4.5	AI-driven solutions and process automations follow Data and AI Division Solution Delivery Process: documented intake assessment, COR-approved solution design, development in Government-designated platform, and UAT with designated functional process owner; technical documentation sufficient for independent Government maintenance	100% of AI-driven solutions follow Solution Delivery Process with all required elements; zero solutions deployed without COR-approved design and completed UAT; 100% include validated maintenance documentation	Solution delivery records, UAT documentation	COR
PS 5.1	Training modules are role-appropriate, aligned to adopted literacy framework, and validated through pilot testing	≥80% pilot participant satisfaction rating; Government acceptance of all modules prior to final publication	Pilot feedback	COR
PS 5.2	Data and AI literacy readiness assessment covering all COR-designated role groups using standardized COR-accepted instrument; documents current competency levels, priority skill gaps, and recommended learning priorities per role group	100% of COR-designated role groups covered; assessment delivered and COR-accepted within task order timeline	Assessment review	COR
PS 5.3	Multi-year data and AI literacy roadmap aligned with DoWEA-adopted literacy framework; includes learning objectives, competency progressions, delivery models, sequencing, and estimated LOE per role group; independently executable by Government staff	All required elements for all COR-designated role groups; validated as independently executable through Government staff review	Staff review	COR
PS 5.4	Facilitator guides for each instructor-led training module including: session objectives, facilitation instructions, timing guidance, discussion prompts, activity instructions, required materials, and troubleshooting	100% of instructor-led modules have accompanying facilitator guide; validated through dry-run delivery by Government staff	Dry-run results	COR

	guidance; enable independent delivery by Government staff or Educational Technologists	member not involved in development		
PS 5.5	All finalized training materials, facilitator guides, source files, and associated content published to Government SharePoint within 5 business days of COR acceptance; includes editable source files organized per Data and AI Division SharePoint information architecture, Section 508 compliant	100% of COR-accepted materials published within 5 business days; zero materials published without editable source files	SharePoint audit	COR
PS 5.6	On-demand data and AI literacy modules developed using multiple delivery modes; at minimum each Data and AI Division literacy domain includes content in ≥2 formats (interactive e-learning, written articles, voice-over presentations, or short-form video); Section 508 compliant; no contractor-hosted platforms required	100% of Data and AI Division literacy domains have on-demand content in ≥2 distinct delivery modes; zero modules require contractor-hosted platforms or proprietary software	Content review	COR
PS 6.1	Ed-Fi integrations use REST API exclusively (no direct database connections); SIS support deliverables align with Ed-Fi Data Standard specifications	100% of Ed-Fi integrations use REST API; SIS data quality meets ≥99.5% reconciliation accuracy	Technical review, reconciliation	COR
PS 6.2	Ed-Fi ODS implementation achieves validated data synchronization for 100% of in-scope education data entities; each entity completes full validation cycle: source-to-ODS mapping verification, descriptor alignment, API synchronization testing, and reconciliation	100% of in-scope data entities complete full validation cycle and are COR-accepted; no entity marked complete without ≥99.5% reconciliation	Validation records	COR
PS 6.3	SIS data quality evaluation program aligned to DoWEA governance standards with quality thresholds, validation rules, and review procedures for each major SIS data domain; co-developed with Government staff; includes recurring review process with defined cycles, responsibilities, and escalation procedures	100% of major SIS data domains covered as defined by COR; program review process validated through ≥1 Government-led review cycle prior to task order completion	Process review	COR

PS 7.1	Status reports submitted on time with complete and accurate information; deliverables meet agreed-upon timelines	95% on-time delivery of status reports and milestone deliverables	Monthly review	COR
PS 7.2	Integrated master schedule, risk register, and issue log maintained across all active task orders, updated weekly; risks identified with probability, impact, and mitigation plan; issues include severity, owner, and target resolution date; proactive identification of schedule conflicts and cross-task-order dependencies with mitigation options presented to COR ≥10 business days in advance	100% accuracy against actual status; zero schedule impacts that were foreseeable and not flagged ≥10 business days in advance	Schedule review	COR
PS 7.3	Monthly status reports include: task order status by workstream, progress against milestones, updated risk and issue status, financial status (hours burned vs. estimated), 30-day look-ahead, and decisions/approvals needed; briefing materials and decision papers are submission-ready for senior leadership without Government rework	100% of monthly status reports contain all required elements; ≤1 status report per quarter returned by COR for substantive correction or incompleteness	Report review	COR
PS 7.4	Transition Plan delivered ≥90 days before end of IDIQ or final active task order; includes: technical operations manuals, active configuration and credentials documentation, knowledge transfer schedule, training completion records with competency assessments, ≥30-day parallel operations period; readiness review at ~60 days; 30 calendar days on-call support post-handoff	Transition Plan delivered at 90-day mark; readiness review at 60-day mark; 100% of transitioned functions validated through independent Government staff execution; 100% of recipients have documented training completion with competency assessments	Transition records	COR

7.1 Quality Assurance Surveillance Plan (QASP)

The Government will utilize a QASP to monitor contractor performance. The QASP may be updated unilaterally by the Government throughout the contract period. The QASP will address both IDIQ-level performance (monthly status reporting, key personnel continuity, responsiveness) and task order-level performance (deliverable quality, timeliness, technical

standards). The COR will conduct surveillance using the methods identified in the PRS and will document findings for use in Contractor Performance Assessment Reporting (CPAR).