


<b>SOLICITATION/CONTRACT/ORDER FOR COMMERCIAL ITEMS</b> <i>OFFEROR TO COMPLETE BLOCKS 12, 17, 23, 24, &amp; 30</i>				1. REQUISITION NUMBER RCS-T-2020-00004		PAGE OF 1 36	
2. CONTRACT NO. GS00Q140ADU113		3. AWARD/ EFFECTIVE DATE 09/30/2020	4. ORDER NUMBER 86615620F00014		5. SOLICITATION NUMBER 86615620Q00004		6. SOLICITATION ISSUE DATE 08/06/2020
7. <b>FOR SOLICITATION INFORMATION CALL:</b>		a. NAME KIMBERLY CAMPBELL		b. TELEPHONE NUMBER (No collect calls) 202-402-3191		8. OFFER DUE DATE/LOCAL TIME	
9. ISSUED BY CODE HUD-NPG US DEPARTMENT OF HUD OFFICE OF THE CHIEF PROCUREMENT OFFICER 451 SEVENTH STREET SW ROOM 5256 WASHINGTON DC 20410-1000			10. THIS ACQUISITION IS <input checked="" type="checkbox"/> UNRESTRICTED OR <input type="checkbox"/> SET ASIDE: % FOR: <input type="checkbox"/> SMALL BUSINESS <input type="checkbox"/> HUBZONE SMALL BUSINESS <input type="checkbox"/> SERVICE-DISABLED VETERAN-OWNED SMALL BUSINESS <input type="checkbox"/> WOMEN-OWNED SMALL BUSINESS <input type="checkbox"/> (WOSB) ELIGIBLE UNDER THE WOMEN-OWNED SMALL BUSINESS PROGRAM <input type="checkbox"/> EDWOSB <input type="checkbox"/> 8(A) NAICS: 541618 SIZE STANDARD: \$16.5				
11. DELIVERY FOR FOB DESTINATION UNLESS BLOCK IS MARKED <input checked="" type="checkbox"/> SEE SCHEDULE		12. DISCOUNT TERMS NET 30 PROMPT PAY		13a. THIS CONTRACT IS A RATED ORDER UNDER DPAS (15 CFR 700) <input type="checkbox"/>		13b. RATING	
15. DELIVER TO CODE GNM GNM US DEPARTMENT OF HOUSING AND URBAN 451 7TH STREET SW WASHINGTON DC 20410			16. ADMINISTERED BY CODE HUD-NPG US DEPARTMENT OF HUD OFFICE OF THE CHIEF PROCUREMENT OFFICER 451 SEVENTH STREET SW ROOM 5256 WASHINGTON DC 20410-1000				
17a. CONTRACTOR/ OFFEROR CODE 019121586 DELOITTE CONSULTING LLP ATTN KEN MARSH DELOITTE CONSULTING LLP SUITE 800 1919 N LYNN STREET ARLINGTON VA 22209-1742 TELEPHONE NO. 703-885-6059		FACILITY CODE	18a. PAYMENT WILL BE MADE BY CODE GNM-GNMA FINANCE GNM-GNMA FINANCE 451 7TH STREET SW B-133 ATTN COMPTROLLER WASHINGTON DC 20410				
<input type="checkbox"/> 17b. CHECK IF REMITTANCE IS DIFFERENT AND PUT SUCH ADDRESS IN OFFER				<input type="checkbox"/> 18b. SUBMIT INVOICES TO ADDRESS SHOWN IN BLOCK 18a UNLESS BLOCK BELOW IS CHECKED <input type="checkbox"/> SEE ADDENDUM			
19. ITEM NO.	20. SCHEDULE OF SUPPLIES/SERVICES			21. QUANTITY	22. UNIT	23. UNIT PRICE	24. AMOUNT
	Tax ID Number: 06-1454513 DUNS Number: 019121586 Mortgage Industry Standards Maintenance (MISMO) Customer Adoption Support Services Accounting Info: 86X0186XXXXXXXX-2020-61000001-XXXXXX-XXXXXXXXXXXXXXXX -XXXXXXXXXX-XXXXXXXXXXXX-XXXXXXXX-XXXXXXXX-XXXX-XX XXXXXXXXXX-XXXXXXXXXXXX-XXXXXXXX-XXXXXXXX Period of Performance: 09/30/2020 to 09/29/2021  Continued ... <i>(Use Reverse and/or Attach Additional Sheets as Necessary)</i>						
25. ACCOUNTING AND APPROPRIATION DATA See schedule						26. TOTAL AWARD AMOUNT (For Govt. Use Only) \$1,849,529.00	
<input type="checkbox"/> 27a. SOLICITATION INCORPORATES BY REFERENCE FAR 52.212-1, 52.212-4, FAR 52.212-3 AND 52.212-5 ARE ATTACHED. ADDENDA				<input type="checkbox"/> ARE <input type="checkbox"/> ARE NOT ATTACHED.			
<input checked="" type="checkbox"/> 27b. CONTRACT/PURCHASE ORDER INCORPORATES BY REFERENCE FAR 52.212-4. FAR 52.212-5 IS ATTACHED. ADDENDA				<input checked="" type="checkbox"/> ARE <input type="checkbox"/> ARE NOT ATTACHED.			
<input checked="" type="checkbox"/> 28. CONTRACTOR IS REQUIRED TO SIGN THIS DOCUMENT AND RETURN 1 COPIES TO ISSUING OFFICE. CONTRACTOR AGREES TO FURNISH AND DELIVER ALL ITEMS SET FORTH OR OTHERWISE IDENTIFIED ABOVE AND ON ANY ADDITIONAL SHEETS SUBJECT TO THE TERMS AND CONDITIONS SPECIFIED.				<input checked="" type="checkbox"/> 29. AWARD OF CONTRACT: OFFER DATED 09/03/2020. YOUR OFFER ON SOLICITATION (BLOCK 5), INCLUDING ANY ADDITIONS OR CHANGES WHICH ARE SET FORTH HEREIN, IS ACCEPTED AS TO ITEMS:			
30a. SIGNATURE OF OFFEROR/CONTRACTOR				31a. UNITED STATES OF AMERICA (SIGNATURE OF CONTRACTING OFFICER) 			
30b. NAME AND TITLE OF SIGNER (Type or print)		30c. DATE SIGNED		31b. NAME OF CONTRACTING OFFICER (Type or print)		31c. DATE SIGNED	
				WENDY D. MCNORIAL		09/30/2020	

**Performance Work Statement (PWS)**  
**MISMO - Customer Adoption Support**

03/27/2020

Version 2.0

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# Performance Work Statement (PWS)

## MISMO - Customer Adoption Support

### Vision Statement

To establish Ginnie Mae Issuer and Vendor support activities for adoption of Ginnie Mae's MISMO-compliant Pool Delivery Dataset (PDD), Validation and Testing Tool (VTT), and Single-Family Pool Delivery Module (SFPDM).

## 1 General Information

### 1.1 Introduction

The Department of Housing and Urban Development (HUD), Government National Mortgage Association (Ginnie Mae), is seeking support services for the adoption of Mortgage Industry Standards Maintenance Organization (MISMO). MISMO is an industry-supported standards development body, has developed a data standard using Extensible Markup Language (XML) for the exchange of mortgage related data, from loan delivery to investor reporting, thereby creating a holistic view of pool and loan data. Along with promoting data exchange between business partners, MISMO standards improve the quality and accuracy of the data exchanged by providing a common set of business terms and definitions.

Ginnie Mae has leveraged the MISMO standard to create the Pool Delivery Dataset (PDD). The PDD currently encompasses data to be submitted by Ginnie Mae's Issuers for Single Family forward mortgages at issuance. The PDD is based on the MISMO Version 3.3 Residential Specifications Reference Model.

### 1.2 Background

A core function of Ginnie Mae's business is the process for Issuers to submit pool and loan data to be assembled and issued as a Ginnie Mae Mortgage-Backed Security (MBS). This process is currently initiated by Issuers utilizing the GinnieNET on the Web (GinnieNET) application to electronically submit the required information. Pool and loan data are currently submitted using flat files or manual data entry; however, Ginnie Mae seeks to align with the mortgage industry for submission of its pool and loan data. Accordingly, Ginnie Mae has identified an opportunity to move towards a standardized, industry accepted MISMO compliant Extensible Markup Language (XML) format for data submission. In support of this effort, Ginnie Mae will transition to the MISMO compliant PDD XML file format and accordingly modernize its applications to be able to consume and process this file from its Issuers.

As part of this modernization effort Ginnie Mae has developed the Single-Family Pool Delivery Module (SFPDM), a new application that will allow Issuers to submit the MISMO compliant PDD XML file for new single-family pool submissions. The previous phases of the MISMO SFPDM project gathered requirements, detailed the design and overall solutions architecture, developed the SFPDM application and integrated it with the MyGinnieMae Portal, the GinnieNET

application and the back-end On-Line Transaction Processing (OLTP) database. This body of work will focus on preparing Issuers and Vendors to adopt the PDD, test their files with the VTT, and ultimately submit their PDD files through the SFPDM to initiate pool issuance. This body of work will focus initially on preparing candidates for the pilot phase of implementation, and then work with the remaining population of Issuers and Vendors to onboard them onto the new SFPDM.

### **1.3 Constraints**

The services identified in this Performance Work Statement (PWS) will adhere to the rules, regulations, laws, standards, and conventions identified by HUD as well as within the Federal Government. Constraints include the following:

- The Contractor shall adhere to all policies and procedures prescribed by Ginnie Mae in order to perform the services stated within this PWS. Such policies and procedures have been established by Ginnie Mae's Project Management Organization (PMO), Data Management Competency Center (DMCC), Architecture Review Board (ARB), Information Security Officer (ISO), and Chief Infrastructure Architecture.

### **1.4 Description of Services**

The Contractor will support Ginnie Mae in its efforts to ensure Issuers and Vendors comply with its MISMO adoption efforts. Being compliant entails the capability to build the new MISMO-compliant Pool Delivery Dataset, successfully testing the PDD with a Validation and Testing Tool (VTT), and ultimately successfully submitting the file through the new Single-Family Pool Delivery Module (SFPDM). This PWS will support:

- External training, testing, triage, and tracking activities, with the objective of preparing Issuers and Vendors to comply with Ginnie Mae's MISMO adoption efforts;
- Outreach efforts to ensure Issuer/Vendor/stakeholder engagement and awareness of timelines, activities, and support;
- Publishing of program and policy guidance related to Ginnie Mae's MISMO adoption efforts; and
- Status reporting and other requirements required as part of Ginnie Mae's and HUDs project management discipline and protocol.

### **1.5 Non-Personal Services**

The Government will neither supervise Contractor employees nor control the method by which the Contractor performs the required tasks. Under no circumstances shall the Government assign tasks to, or prepare work schedules for, individual Contractor employees. It shall be the responsibility of the Contractor to manage its employees and to guard against any actions that are of the nature of personal services or give the perception of personal services.

If the Contractor believes that any actions constitute, or are perceived to constitute personal services, it shall be the Contractor's responsibility to notify the Contracting Officer (CO) immediately. These services shall not be used to perform work of a policy, decision making, or management nature, i.e. inherently Government functions. All decisions relative to programs supported by the Contractor shall be the sole responsibility of the Government.

## **1.6 Period of Performance**

The period of performance shall be for one (1) base period of 12 months, and four (4) 12-month option periods.

## **1.7 Place of Performance**

The services to be performed under this contract shall be performed at the Contractor's facilities.

## **1.8 Hours of Operation**

Normal workdays are Monday through Friday except US Federal Holidays. Workers typically work eight (8) hours per day, 40 hours per week. Core hours of work are from 8:00am to 4:30pm daily. All employees are expected to be available during core hours.

## **1.9 Special Qualifications**

This requirement requires specialized expertise and technical experience in implementing the MISMO standard. The MISMO standard is a common data language for exchanging information for the residential finance industry. The Contractor must be qualified in understanding the MISMO model structure; MISMO's Logical Data Dictionary (LDD); XML Schema; and XML Implementation requirements. Additional information about the MISMO standard can be found at [www.MISMO.org](http://www.MISMO.org).

## **1.10 Post Award/Kickoff Conference**

The Contractor shall attend any post award conference convened by the contracting activity or contract administration office in accordance with FAR Subpart 42.5. The Government intends to convene a Post Award Conference with the Contractor within ten business days after contract award. The Contracting Officer will notify the Contractor of the specific date, location, and agenda within five business days after contract award.

## **1.11 Status Meetings**

The Contracting Officer, Contracting Officer's Representative (COR) and other Government personnel, as appropriate may meet periodically with the Contractor to also review Contractor performance, requirement status, etc. At these meetings, the Contracting Officer will apprise the Contractor of how the Government views the Contractor's performance or progress of the requirement. The Contractor will apprise the Government of problems, if any, being experienced. Appropriate action shall be taken to resolve outstanding issues. These meetings shall be at no additional cost to the Government. Post Award Conference and subsequent meetings may be held via teleconference.

## **1.12 Contractor Travel**

Prior to travel, the Contractor shall coordinate with and receive Government authorization from the COR for all travel. Reimbursement of travel costs will be in accordance with the Federal Travel Regulation and in accordance with FAR 31.205-46. The Contractor shall travel using the lower cost mode transportation commensurate with the mission requirements. When necessary to use air travel, the Contractor shall use the tourist class, economy class or similar lodging accommodations to the extent they are available and commensurate with the mission requirements. HUD will not reimburse Contractor's local travel. Local travel is defined as travel within fifty (50) miles of Washington, DC. All other travel will be reimbursed on a cost reimbursable basis; no profit or fee will be paid.

## **1.13 Transition In**

The Contractor shall, upon the Contracting Officer's written notice, furnish Transition-In services as required. As a successor, the Contractor shall have sufficient personnel on board during the Transition-In period to ensure a smooth transition with the incumbent Contractor. The Contractor shall provide an orderly transition of work acceptance and accomplishment such that any impact to the program is minimized. During the Transition-In period, the Contractor shall become familiar with the requirements in order to commence full performance of services by the end of the contract Transition-In period. Transition-In is not required if the successor Contractor is the incumbent Contractor.

## **1.14 Transition Out**

To minimize any decrease in productivity and to prevent possible negative impacts on additional services, the Contractor shall have sufficient personnel on board during the 60-day Transition-Out period. The incumbent Contractor shall ensure a smooth transition with the successor Contractor during the Transition-Out period, prior to completion of contractual performance.

The incumbent Contractor shall aid the successor in the development of plans, procedures, and methods for the assumption of all on going work. The Contractor shall provide an orderly transition of work acceptance and accomplishment, such that full control by the successor Contractor is achieved by the end of the new contract Transition-In period.

## **2 Definitions and Acronyms**

### **2.1 Definitions**

**Business/Workdays** - Every official work day of the week which are days between and including Monday to Friday. This does not include public holidays and weekends.

**Calendar Day** - Any day of the week.

**Contractor** - A supplier or vendor awarded a contract to provide specific supplies or service to the Government. The term used in this contract refers to the prime.

**Contracting Officer (CO)** - A person with authority to enter into, administer, and/or terminate contracts and make related determinations and findings on behalf of the Government. Note: the only individual who can legally bind the Government.



Contracting Officer's Representative (COR) - An employee of the U.S. Government appointed by the Contracting Officer to perform contract administration activities in regard to technical issues. This individual has authority to provide technical direction to the Contractor as long as direction is within the scope of the contract, does not constitute a change and has no funding implications. This individual does NOT have authority to change the terms and conditions of the contract.

Defective Service - A service output that does not meet the standard of performance associated with the Performance Work Statement.

Deliverable Anything that can be physically delivered but may include non-manufactured things such as meeting minutes or reports.

Government Furnished Property (GFP) - Government-furnished property means property in the possession of, or directly acquired by, the Government and subsequently furnished to the Contractor for performance of a contract. Government-furnished property includes, but is not limited to, spares and property furnished for repair, maintenance, overhaul, or modification. Government-furnished property also includes contractor-acquired property if the contractor-acquired property is a deliverable under a cost contract when accepted by the Government for continued use under the contract.

Integrated Project Team (IPT) - A system of collaborative resources with varying skills relevant to a project working in the delivery of that project on a day to day basis.

Mortgage Industry Standards Maintenance Organization (MISMO) - A not-for-profit, wholly owned subsidiary of the Mortgage Bankers Association (MBA) responsible for developing standards for exchanging information and conducting business in the U.S. mortgage finance industry.

Performance Requirements Summary (PRS) - A listing of the performance requirements under the contract that are to be evaluated by the Government on a regular basis, performance indicators for these requirements, performance standards for these requirement and surveillance methods to be used to determine if performance standards are met.

Performance Standard - The Contractor's performance level required by the Government.

Performance Work Statement (PWS) - A statement of work for performance-based acquisitions that describe the required results in clear, specific and objective terms with measurable outcomes.

Physical Security - Actions that prevent the loss or damage of Government property.

Quality Assurance (QA) - Policies and procedures adopted by the Government to ensure that supplies and services acquired under Government contracts conform to the contracts quality requirements.

Quality Assurance Surveillance Plan (QASP) - A plan describing how the agency will survey, observe, test, sample, evaluate and document the Contractor's performance in meeting critical performance standards identified in the contract.

Quality Control (QC) - All necessary measures taken by the Contractor to assure that the quality of an end product of service shall meet contract requirements.

Service Contract - A contract that directly engages the time and effort of a Contractor whose primary purpose is to perform an identifiable task rather than to furnish an end item of supply.

Subcontractor - Any person , other than the prime Contractor, who offers to furnish or furnishes any supplies, material, equipment, or services of any kind under a prime contract or a subcontract entered into in connection with such prime contract, and any person who offers to furnish or furnishes general supplies to the prime contractor or a higher tier subcontractor. The Government does not have privity of contract with a subcontractor.

Work Week - Monday through Friday, unless specified otherwise.

## **2.2 Acronyms**

AQL - Acceptable Quality Level

ARAMS - Automated Renewal and Amendment System

BAA - Business Area Analysis Study

CBT - Computer-Based Training

CCB - Change Control Board

CCMB - Configuration Change Management Board

CMMI - Capability Maturity Model Integration

CFO or OCFO - Office of the Chief Financial Officer of HUD

CFR - Code of Federal Regulations

CIO or OCIO - Office of the Chief Information Officer of HUD

CO - Contracting Officer

COR - Contracting Officer Representative

COTS - Commercial Off-the-Shelf

CPO - Office of the Chief Procurement Officer of HUD

EST - Eastern Standard Time (U.S.)

ETC - Estimate to Completion

GAO - U.S. General Accounting Office

IPT - Integrated Project Team

MISMO - Mortgage Industry Standards Maintenance Organization

HUD - U.S. Department of Housing and Urban Development

HUDAR - HUD Acquisition Regulation

HUD/ISG - Internet Services Group within the Telecom Processing Division

HUD Web - HUDs Intranet Web Site and related WEB pages.

IG or OIG - Inspector General (Office of)

IT - Information Technology

IV&V - Independent Validation and Verification

LOOCS - Line of Credit Control System

OCPO - Office of the Chief Procurement Officer

OIG - Office of Inspector General

OMB - Office of Management and Budget

PL Public Law

PM - Project Manager

POC - Point of Contact

PPM - Project Planning and Management

QA - Quality Assurance

QASP - Quality Assurance Surveillance Plan

QCP - Quality Control Plan

SF - Standard Form

TBD - To be determined

U.S.C - United States Code

### **3 Government-Furnished Property and Services**

The Contractor shall ensure accurate control and accountability of all Government-Furnished Property in accordance with the terms and conditions of this contract. The Government will furnish, at no cost to the Contractor, the GFP shown below.

#### **3.1 Government Services**

The Government will provide subject-matter or process- experts related to the objectives captured in the PWS. The Government may provide training, if additional instruction is required to achieve the objective.

#### **3.2 Facilities**

The Government will provide space on an as needed basis, on occasions when the Contractor is required to be on site for meetings or working sessions.

#### **3.3 Equipment**

N/A

#### **3.4 Materials**

The Government will provide documentation or access to information that offers context, additional background, training, or requirements related to the objectives stated here within. Any information that is provided to the Contractor is considered the property of the Government and is required to be returned to the COR prior to the end of the Contractor's engagement. Copies of required materials may be provided to the Contractor in hard copy or soft copy. All materials will remain the property of the Government and will be returned to the COR upon request or at the end of the contract period.

#### **3.5 Quality Assurance (QA)**

The Government shall evaluate the Contractor's performance under this contract in accordance with the Quality Assurance Surveillance Plan. This plan is primarily focused on what the Government must do to ensure that the Contractor has performed in accordance with the performance standards. It defines how the performance standards will be applied, the frequency of surveillance, and the minimum acceptable quality level.

### **4 Contractor-Furnished Items and Services**

The Contractor shall furnish, all facilities, equipment, and supplies required to perform the work under this contract that are not listed under Government-Furnished Property and Services.

#### **4.1 Facilities**

The Contractor shall furnish any facilities, workspaces, or remote capability necessary to meet the requirements of the contract.

#### **4.2 Equipment**

The Contractor shall furnish any equipment, including computer and peripherals, necessary to meet the requirements under this contract.

### **4.3 Material**

The Contractor shall furnish any materials, including those required to deliver hard and soft copy work products, in meeting the requirements of this contract.

### **4.4 Contractor Responsibilities**

The Contractor shall only conduct business with designated Government personnel listed as points of contact (POCs). Names of authorized personnel shall be provided to the Contractor by the Government, in writing, and updated as necessary throughout the contract period.

U.S. Government records, copies of original results and reports, verified original data, corrected data and corrected supporting final reports which are maintained by the Contractor remain the property of the U.S. Government. These files/results must be surrendered to the COR.

### **4.5 Contractor Personnel**

The Contractor shall provide a Contract/Project Manager who shall be responsible for the performance of work. An alternate shall also be designated to act in the absence of the Contract/Project Manager. These Contractor personnel (main point of contact and alternate point of contact) are considered Key Personnel by the Government and shall be listed as such in accordance with HUDAR 2452.237-70, "Key Personnel.

The Contract/Project Manager and alternate shall have full authority to act on all contact matters relating to daily operations of this contract. Accordingly, at a minimum, the points of contact shall have the technical knowledge of the requirement and be in the position to actually receive assignment, guidance, and direction from the COR and CO per HUDAR 2452.237-73, "Conduct of Work and Technical Guidance" and shall be allocated enough hours to the requirement to ensure successful performance.

These points of contact shall each be an employee of the Contractor. An employee of a subcontractor is not acceptable for either of these positions. The Contract/Project Manager or alternate shall be available between the hours of 8:00am to 4:30pm Monday through Friday EST, except Federal Holidays or when the Government facility is closed for administrative reasons.

### **4.6 Identification of Contractor Employees**

All Contractor/subcontractor personnel shall wear company picture identification badges as to distinguish themselves from Government employees. When conversing with Government personnel during business meetings, over the telephone, or via electronic mail, Contractor/subcontractor personnel shall identify themselves as such to avoid situations arising where sensitive topics might be better discussed solely between Government employees.

Contractors/subcontractors shall identify themselves on any attendance sheet or any coordination documents they may review. Electronic mail signature blocks shall identify their company affiliation. Where practicable, Contractor/subcontractors occupying collocated space with their Government program customer shall identify their workspace area with their name and company affiliation, or at a minimum, "Contractor" after name.

## **4.7 Quality Control**

The Contractor shall establish and maintain a complete quality control program that shall ensure services are performed in accordance with this contract. The Contractor shall develop and implement procedures to identify, prevent, and ensure non reoccurrence of defective services. The Contractor's quality control program is the means by which he assures himself that his work complies with the requirements of the contract. The Contractor shall provide the associated Quality Control Plan to the Government as directed.

### **4.7.1 Quality Control Plan**

The Contractor shall develop, maintain, enforce, and document a Quality Control Plan (QCP). The QCP shall ensure the Government receives the level of quality that is consistent with the requirements specified in this contract. The QCP shall be sufficiently detailed to provide the Contractor's methodology for identifying and recruiting qualified personnel. The QCP shall also provide the Contractor's methodology for resolving problems identified by the Government during reviews conducted in accordance with its Quality Assurance Surveillance Plan (QASP).

The QCP shall also provide the Contractor's methodology for establishing an internal feedback system for support personnel, and for resolving problems identified by that feedback system.

The QCP shall demonstrate and validate that the services or deliverables to be provided under the contract are completed with a level of quality that meets the minimum performance threshold established in the Government's QASP. The QCP shall address Quality Management Approach, Quality Assurance, Quality Control and Quality Standards.

## **5 Specific Tasks**

### **5.1 To conduct external training, testing, triage, and tracking activities, with the objective of preparing Issuers and Vendors to build the new Pool Delivery Dataset (PDD), test it via the Validation and Testing Tool (VTT), and submit it via the SF Pool Delivery Module (SFPDM)**

- The Contractor shall provide training, testing, triage, and tracking activities for Ginnie Mae's MISMO adoption pilot phases and subsequent phases.
- The Contractor shall create new and/or make updates to existing training materials and test cases in response to any new requirements or defects that might be revealed during testing or implementation activities.
- The Contractor shall create training and testing data, including test PDD XML files.
- The Contractor shall develop training modules, via options including virtual training, visual presentations, in-person class training, and self-service training.
- The Contractor shall conduct approximate 4 in-person training courses annually.
- The Contractor shall participate in reviews of training materials with the Customer Adoption Group (CAG).

- The Contractor shall conduct training for Issuers on the PDD, VTT, and SFPDM at specific stakeholder facilities and Ginnie Mae.
- The Contractor shall track Issuers who have completed training via Ginnie Mae's Salesforce module (a cloud-based Customer Relationship Management tool used for managing Issuer profiles), or any other tool specified by Ginnie Mae.
- The Contractor shall provide triage support based on calls with Issuers in testing their generated PDD files, sending the files through the VTT, submitting the files via the SFPDM, and in resolving submission errors and failures.
- The Contractor shall field calls and emails from Issuers and Vendors in a timely manner, and shall provide responses within 1 business day.
- The Contractor shall track the progress of Issuer PDD file testing, via Ginnie Mae's Salesforce module or any other tool specified by Ginnie Mae. This includes recording feedback/questions, reviewing and updating outstanding inquiries, and closing open issues and questions.

#### Performance Standards

a) Standard: Complete actions and provide deliverables within specified deadlines as prescribed 100% of the time.

AQL: Zero deviation in delivery against milestone dates, unless approved for re-baseline schedule change and agreed to by COR.

b) Standard: Quality - All deliverables are accurate, free of grammatical errors, contain all required information as prescribed 100% of the time.

AQL: End Products shall receive approval from Ginnie Mae's project manager for the integrated project team (IPT) with zero deviation.

#### Deliverables

A001 MISMO Adoption Testing Documentation

A002 MISMO Adoption Training Documentation

A003 PDD Triage and Tracking Documentation

### **5.2 To conduct outreach efforts to ensure Issuer/Vendor/stakeholder engagement and awareness of Ginnie Mae's MISMO-adoption timelines, activities, and support framework**

- The Contractor shall create new content and update pre-existing content on GinnieMae.gov, including but not limited to Customer Adoption Strategy announcements, PDD documentation updates, and general information sharing posts.

- The Contractor shall create new content and update pre-existing knowledge center content that supports Issuers/Vendors/Users of differing levels of experience in their adoption efforts. This includes problem-solving tips and general information sharing related to the PDD, VTT, and SFPDM.
- The Contractor shall support Ginnie Mae in ad hoc Issuer and Vendor outreach calls. This includes preparing logistics, setting agenda, preparing presentations, tracking meeting participations, and completing action items.
- The Contractor shall draft e-Notifications on behalf of Ginnie Mae.
- The Contractor shall support Ginnie Mae at MISMO and MBA-sponsored conferences and assist with presentation materials.
- The Contractor shall support, as needed, on-site Issuer and Vendor visits, including providing presentation of materials, documenting meetings, and completing follow-up items.
- The Contractor shall plan and execute targeted outreach for selected at-risk Issuers and Vendors, including working with the project team on identifying and implementing mitigation procedures.
- The Contractor shall summarize and present outreach results.

#### Performance Standards

a) Standard: Completes actions and provides deliverables within specified deadlines as prescribed 100% of the time.

AQL: Zero deviation in delivery against milestone dates, unless approved for re-baseline schedule change and agreed to by COR.

b) Standard: Quality - All deliverables are accurate, free of grammatical errors, contain all required information as prescribed 100% of the time.

AQL: End Products shall receive approval from Ginnie Mae's project manager for the integrated project team (IPT) with zero deviation.

#### Deliverables

A004 Outreach Documentation

### **5.3 To support Ginnie Mae in publishing program and policy guidance related to MISMO adoption efforts.**

- The Contractor shall update PDD documentation and specifications based on any discovered defects and based on any requirements updates.
- The Contractor shall facilitate the publication of the PDD documentation on the GinnieMae.gov web site.
- The Contractor shall identify any chapters in the MBS Guide that are affected by the MISMO adoption efforts and highlight impact.
- The Contractor shall draft edits to the MBS Guide to reflect changes necessary to align with the implementation of the PDD and SFPDM.
- The Contractor shall review proposed edits to the Guide, review with relevant stakeholders, and facilitate publication in the MBS Guide.
- The Contractor shall draft All Participants Memorandums (APMs) to communicate policy and guidance changes to Issuers.



- The Contractor shall facilitate review of APMs, incorporate feedback, and facilitate publication.

#### Performance Standards

a) Standard: Complete actions and provides deliverables within specified deadlines as prescribed 100% of the time.

AQL: Zero deviation in delivery against milestone dates, unless approved for rebaseline schedule change and agreed to by COR

b) Standard: Quality - All deliverables are accurate, free of grammatical errors, contain all required information as prescribed 100% of the time.

AQL: End Products shall receive approval from Ginnie Mae's project manager for the integrated project team (IPT) with zero deviation.

#### Deliverables

A005 Guide, Policy, and Specifications Updates

### **5.4 To prepare status reporting and comply with Ginnie Mae's project management discipline and protocol, to ensure transparency and effectiveness**

- The Contractor shall attend and provide support to Ginnie Mae during team meetings, status updates, collaborative working sessions, and stakeholder updates.
- The Contractor shall prepare any status reporting, progress reports, and project dashboards required by Ginnie Mae's PMO or other governance bodies
- The Contractor shall attend Ginnie Mae Project Management Office (PMO) meetings, and any other meetings related to change-control, project planning, and executive briefings.

#### Performance Standards

a) Standard: Completes actions and provides deliverables within specified deadlines as prescribed 100% of the time.

AQL: Zero deviation in delivery against milestone dates, unless approved for re-baseline schedule change and agreed to by COR.

b) Standard: Quality - All deliverables are accurate, free of grammatical errors, contain all required information as prescribed 100% of the time.

AQL: End Products shall receive approval from Ginnie Mae's project manager for the integrated project team (IPT) with zero deviation.

#### Deliverables

A006 Project Status Reporting

## **6 Deliverables**

The Contractor shall complete all work and submit all deliverables as specified herein. The Government reserves the right to make changes to delivery dates.

Number	Name	Frequency	Quantity
A001	MISMO Adoption Testing Documentation	As Needed	1
	Main components will include: <ul style="list-style-type: none"> <li>- TEST SCRIPTS to be used to guide user testing</li> <li>- TEST PDD XML FILES to be used in training and testing exercises</li> </ul>		
A002	MISMO Adoption Training Documentation	As Needed	1
	Main components will include: <ul style="list-style-type: none"> <li>- TRAINING MODULES, such as virtual training, visual training, visual presentations, in-person class training, and self-service training</li> <li>- TRAINING MATERIALS AND SCRIPTS associated with training modules</li> </ul>		
A003	PDD Triage and Tracking Documentation	As Needed	1
	Main components will include <ul style="list-style-type: none"> <li>- SUMMARY PROGRESS REPORTS generated from Salesforce or another tracking application that show Issuer and Vendor Progress against adoption milestones</li> <li>- DETAILED LOGS detailing Issuer/Vendor inquiries, associated tracking tickets, and subsequent resolutions</li> </ul>		
A004	Outreach Documentation	As Needed	1
	Main components will include <ul style="list-style-type: none"> <li>- WEB CONTENT including Customer Adoption Strategy announcements, PDD documentation updates, and general</li> </ul>		

information sharing posts.

- KNOWLEDGE CENTER CONTENT  
including problem-solving tips related to the  
PDD, VTT, and SFPDM

- OUTREACH ACTIVITY  
DOCUMENTATION including draft agendas,  
draft presentations, action item logs,  
participant logs, and meeting minutes

- DRAFT e-NOTIFICATIONS

- DRAFT CONFERENCE  
PRESENTATIONS AND MATERIALS

- ISSUER AND VENDOR VISIT  
MATERIALS including agendas,  
presentation materials, and minutes

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A005	Guide, Policy, and Specifications Updates	As Needed	1
	Main components will include:		
	- Updated PDD Specifications		
	- DRAFT UPDATES TO THE MBS GUIDE		
	- DRAFT ALL PARTICIPANTS MEMORANDUMS (APMs)		

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A006	Project Status Reporting	Monthly	1
	Status reports, progress reports, project dashboards required by Ginnie Mae's PMO or other governance bodies		

## 6.1 Quality Control Plan

The Contractor's QCP shall be delivered to the COR within 10 business days after contract award (or with the Contractor's proposal if it is an evaluation factor). A revised copy of the QCP shall be submitted to the COR within 5 business days of any changes made thereafter.

## 6.2 Acceptance Criteria

Acceptance of all deliverables shall be submitted in a draft format agreed upon by the Contractor and the Government. Upon review and acceptance by the Government, the Contractor shall address all Government comments and submit a final draft within 5 business days of Government notification. Each deliverable must be accurate in terms of content relevancy, grammar, and punctuation.

## 7 Performance Requirements Summary

The summary chart below lists the contract's primary requirements, the associated performance standards, the expected target performance and the methods of surveillance. While several contract requirements are not listed in the chart below, requirements not appearing on the PRS chart do not negate the Contractor's obligation to perform all requirements as specified in the contract. Additionally, HUD reserves all rights and remedies under the provisions and clauses of the contract when performance of any contract requirement, whether or not listed below, is unacceptable.

HUD will develop a Quality Assurance Surveillance Plan to be used to provide contract oversight. In conjunction with the Contractor's Quality Control Plan and various other methods of assessing performance, the COR will perform on-site reviews and/or other types of verification to determine that the specified target performance requirements have been met.

Regular review of Contractor performance is critical to the overall success of the contract.

## 8 Related Documents

The Contractor shall abide by all applicable regulations, publications, manuals, policies, and procedures in the performance of this contract.

### Performance Requirement Summary (PRS)

Statements	Standards/AQLs	Remedy
5.1 To conduct external training, testing, triage, and tracking activities, with the objective of preparing Issuers and Vendors to build the new Pool Delivery Dataset (PDD), test it via the Validation and Testing Tool (VTT), and submit it via the SF Pool Delivery Module (SFPDM)	<p>a) Standard: Completes actions and provides deliverables within specified deadlines as prescribed 100% of the time.  AQL: Zero deviation in delivery against milestone dates, unless approved for re-baseline schedule change and agreed to by COR</p> <p>b) Standard: Quality - All deliverables are accurate, free of grammatical errors, contain all required information as prescribed 100% of the time.  AQL: End Products shall receive</p>	Any revisions that are required due to mistakes by the Contractor will be done at no cost to the Government.

	approval from Ginnie Mae's project manager for the integrated project team (IPT) with zero deviation.	
5.2 To conduct outreach efforts to ensure Issuer/Vendor/stakeholder engagement and awareness of Ginnie Mae's MISMO-adoption timelines, activities, and support framework	<p>a) Standard: Completes actions and provides deliverables within specified deadlines as prescribed 100% of the time.  AQL: Zero deviation in delivery against milestone dates, unless approved for re-baseline schedule change and agreed to by COR</p> <p>b) Standard: Quality - All deliverables are accurate, free of grammatical errors, contain all required information as prescribed 100% of the time.  AQL: End Products shall receive approval from Ginnie Mae's project manager for the integrated project team (IPT) with zero deviation.</p>	Any revisions that are required due to mistakes by the Contractor will be done at no cost to the Government
5.3 To support Ginnie Mae in publishing program and policy guidance related to MISMO adoption efforts.	<p>a) Standard: Completes actions and provides deliverables within specified deadlines as prescribed 100% of the time.  AQL: Zero deviation in delivery against milestone dates, unless approved for re-baseline schedule change and agreed to by COR</p> <p>b) Standard: Quality - All deliverables are accurate, free of grammatical errors, contain all required information as prescribed 100% of the time.  AQL: End Products shall receive approval from Ginnie Mae's project manager for the integrated project team (IPT) with zero deviation.</p>	Any revisions that are required due to mistakes by the Contractor will be done at no cost to the Government
5.4 To prepare status reporting and comply with Ginnie Mae's project management discipline and protocol, to ensure transparency and effectiveness	<p>a) Standard: Completes actions and provides deliverables within specified deadlines as prescribed 100% of the time.  AQL: Zero deviation in delivery against milestone dates, unless approved for re-baseline schedule</p>	Any revisions that are required due to mistakes by the Contractor will be done at no cost to the Government

	<p>change and agreed to by COR</p> <p>b) Standard: Quality - All deliverables are accurate, free of grammatical errors, contain all required information, and comply with HUD's PPM framework (when applicable)</p> <p>AQL: End Products shall receive approval from Ginnie Mae's project manager for the integrated project team (IPT) with zero deviation.</p>	
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