Statement of Work

For Support to Information Review and Release (SIRR)

Prepared by
Information Management Services

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Introduction

This Statement of Work (SOW) for *Support to Information Review and Release (SIRR)* describes the tasks and deliverables required of the Contractor in providing support for CIA information review and release programs and other related information management programs. It includes support for several smaller information management programs executed by Other Government Agencies (OGAs).

1.1   Background

Information Management Services (IMS) within the Chief Information Officer (CIO) organization is responsible for providing oversight and direction to the Central Intelligence Agency's information review and release and records and classification management programs. IMS is specifically responsible for the management and coordination of all CIA mandated and discretionary information review and release programs to include:

- Executive Order (EO) 12958, as amended and related Implementing Directive (Appendices 1 and 2).

- The Freedom of Information Act (FOIA) of 1996.

- Privacy Act (PA) of 1974.

- Special statutes that authorize the release of information.

CIO/IMS also responds to information requests from:

- The Director of the Central Intelligence Agency.

- The Agency's Inspector General.

- Litigation cases.

- Pre-publication reviews.

In addition, CIO/IMS is the Agency's focal point for special searches that arise from the:

- Executive Branch.

- Congressional Branch.

- Judicial Branch.

- Diplomatic sectors of the US government.

Finally, IMS supports several discretionary release programs where the topic or subject matter is deemed to be of significant historical interest.

The Information Review & Release Group (IRRG) within the CIO/IMS manages these programs. The IRRG also supports the Director of National Intelligence review and release programs at their request.

The CIA Declassification Center (CDC) is a component in IRRG and was established to ensure the Agency's compliance with the Presidential Executive Order (EO) 12958, as amended, "Classified National Security Information," which requires the automatic declassification of Agency nonexempt permanent records more than 25 years old beginning 31 December 2006. The CDC estimates there are approximately 145 million pages of applicable records that are subject to review for declassification on or before 31 December 2012. To date, approximately, 103 million of these pages have been reviewed. This review of the remaining 42 million pages is a multi-year project with specific annual goals established to meet the Executive Order's timeline. The Executive Order requirements are ongoing and expected to generate a review workload of approximately eight million pages per year at least through 2015.

The CDC is the Executive Agent to the interagency Remote Archive Capture (RAC) program. The Remote Archive Capture program is a joint National Archives and Records Administration (NARA) and CIA program that addresses the obligation of agencies to meet the Executive Order 12958, as amended, requirements for review and release of classified material owned by the Presidential Libraries, which are subordinated to NARA. In this role, the CDC manages records conversion (from hardcopy documents to electronic format) at Presidential Libraries in support of all participating government agencies. Records collected under the RAC program will be processed by CDC, sorted for the OGAs and made available to the OGAs for an online declassification review at the Sponsor's site. The results of the review are provided back to the cognizant Presidential Library from which the records were scanned and collected. The RAC Program supports the following Presidential Libraries: Dwight D. Eisenhower Library, Abilene, KS; John F. Kennedy Library, Boston, MA; Lyndon B. Johnson Library, Austin, TX; Nixon Presidential Materials, College Park, MD; Gerald Ford Library, Ann Arbor, MI; Jimmy Carter Library, Atlanta, GA; Ronald Reagan Library, Simi Valley, CA; and George Bush Library, College Station, TX. Small teams of contractor personnel are resident at several libraries in support of the RAC Program.

The CDC also provides information review and release support to the declassification efforts of the National Aeronautics and Space Administration (NASA) and the United States Air Force (USAF).

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1.2   Project Objectives

The objective of this effort is to provide the management and labor resources necessary to support CIO/IMS in meeting its annual goals for information review and release and related programs. The Contractor shall provide the necessary level of Full-Time Equivalent (FTE) personnel with the requisite qualifications to fulfill the tasks stated in this SOW.

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Section 2: Scope of Work

2.0 Overview

The scope of this effort includes CIA information review and release and supporting tasks such as scanning, indexing and archival support. Similar tasks performed by OGAs in support of the Sponsor's mission are also within the scope of this effort.

The CIA Declassification Center Declassification Plan (Appendix 3) supports the automatic declassification provisions of EO 12958, as amended, and provides additional background on the CIA's 25-Year program.

The following non-CDC components within IRRG are also responsible for review and release described in this SOW.

The Public Information Programs Division (PIPD) serves as the Agency's focal point for all public requests under the FOIA, PA and Mandatory Review (MR) provisions of Executive Order 12958, as amended.

The Historical Collections Division (HCD) reviews CIA material on events or topics of historical interest. HCD, in consultation with the CIA History Staff and the D/CIA Historical Review Panel, coordinates these systematic declassification reviews. HCD serves as the CIA focal point for the Department of State's Foreign Relations of the United States (FRUS) releases. HCD also performs special searches at the request of the executive, legislative or judicial branch and reviews for release CIA material resulting from these searches, advocating the Agency's position on the associated release decisions.

The Information Review Offices (IROs) are responsible for planning, directing and managing declassification activities for their components. They conduct searches and review information for release in response to official and public requests.

The following non-CDC components within CIO/IMS support the information review and release programs.

The Agency Scanning Center (ASC) is responsible for the conversion of the Agency's records, which include microfilm, microfiche and hardcopy to electronic format and indexing those records to facilitate search. ASC personnel also use software tools to identify duplicate records to ensure consistency in the review process. The ASC also does records conversion for Other Government Agencies (OGAs) on a cost-reimbursable basis.

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The Agency Archives and Records Center (AARC) is responsible for receiving, processing, storing, and maintaining retired and inactive records and making these records available as required.

In addition, OGAs, such as NASA, and the USAF, maintain equity identification, review, and release programs in response to EO 12958, as amended.

2.1   Level of Effort

The level of effort required under this contract shall be for approximately 82.8 FTE. An FTE, for the purposes of this SOW, is considered two thousand (2000) work-hours per year for all non-key personnel. However, Key Personnel shall be proposed based on the Contractor's work-hours for an FTE.

Refer to Attachment A for staffing requirements.

2.2   Period of Performance

The period of performance for the work specified in this SOW shall be twelve (12) months from date of contract award with four (4) one-year option periods.

2.3   Place of Performance

The majority of the work shall take place at Government facilities in the Washington Metropolitan Area (WMA)   (b)(3)

Onsite support is required at the Presidential Libraries located in Abilene, KS, Austin, TX; Atlanta, GA; and Simi Valley, CA. Travel to Presidential Libraries is required in support of the RAC Program scanning activities.

2.4   Work Hours/Work Days

Generally, the Contractor's personnel shall perform the required tasks under this SOW during normal work days (Monday – Friday) and office hours (0700-1800); however a flexible schedule can be accommodated providing customer office hours are adequately covered and subject to approval of the Contracting Officer/Technical Representative (COTR). Exceptions are tasks with required hours described in the SOW, specifically TASK 1F and TASK 2A (mail processing only.)

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Section 3: Tasks and Associated Deliverables

The Contractor shall perform and deliver the following tasks and deliverables as described below. The Contractor shall support all projects and meet goals and deadlines. The Sponsor, in consultation with the Contractor, sets review and release targets and associated schedules and requirements at the beginning of each fiscal year. If needed, priorities will be de-conflicted by the Sponsor. Recommendations from the Contractor shall be approved by the Sponsor, in writing, before implementation.

The Sponsor is responsible for final declassification decisions and approval for the physical release of records.

CDC tasks fall under Section 3.1. Non-CDC tasks fall under Section 3.2, Section 3.3, Section 3.4 and Section 3.5.

3.1   CIA Declassification Center (25-Year Program)

In support of the 25-year program, the Contractor shall provide labor with experience supporting Agency Directorates and the D/CIA Area (i.e. DI, NCS, DS, DS&T, and D/CIA), as needed. Except as indicated, the Sponsor will provide the automated software tools to facilitate the review and release process.

The Contractor shall review records for redaction and release decisions under the 25-Year Program (see Section 9, Appendix 3 for a more detailed description of this program).

3.1.1   CDC Tasks (TASK 1)

The Contractor shall:

•   Review and redact documents, electronically and/or manually, using the criteria of Executive Order 12958, as amended, and internal declassification guidance as provided by the Sponsor.

•   Provide the rationale for redaction actions on the electronic version of the document (or on forms associated with a hardcopy version of the document) using redaction codes provided in the declassification guidance provided by the Sponsor.

•   Record decisions in the CIA Automated Declassification and Release Environment (CADRE) database, in other automated systems or on hardcopy forms, as appropriate.

•   Determine if a record contains Other Government Agency (OGA) equities and requires external referral or if the record requires non-routine exception handling; document these findings in the CADRE database.

- Manage the referral process for OGA equity.

- Research previous declassification decisions as necessary to ensure accuracy, consistency and efficiency and provide feedback to the Sponsor.

- Perform necessary tasks including, but not limited to, database maintenance to record activities and coordination of inter- and intra-organizational referrals as necessary.

The Sponsor is responsible for final declassification decisions and approval for the physical release of records.

3.1.1.1 CDC Deliverables

The Sponsor, in consultation with the Contractor, sets review and release targets, and associated schedules and requirements at the beginning of each fiscal year. The deliverables include, but are not limited to, a target number of pages reviewed and released.

3.1.2 Remote Archive Capture (RAC) Program Support

The Remote Archive Capture program is a joint National Archives and Records Administration (NARA) and CIA program that addresses the obligation of agencies to meet the Executive Order 12958 requirements for review and release of classified material owned by the Presidential Libraries, which are subordinated to NARA. CDC, as Executive Agent of the program, manages records conversion (from hardcopy documents to electronic format) at Presidential Libraries in support of all participating government agencies. Records collected under the RAC program will be processed by ASC, in accordance with Task 3, sorted by OGA equity present and made available to the OGAs for online declassification review at the Sponsor's site. The Sponsor will provide the results of the review back to the Presidential Library from which the records were scanned and collected.

3.1.2.1 Remote Archive Capture Tasks–TASK 1A

The Contractor on Temporary Duty (TDY) at a Presidential Library shall:

- Review the documents and identify the OGA based on letterhead or prevailing equity in the document. Each document is to be tabbed for the OGA.

- Upon receipt of documents, the Contractor shall perform an inventory check to insure all documents and pages are accounted for and readied for scanning. Preparation

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is to consist of bar coding, inventory control, staple removal, clean up, and placement of appropriate separator sheets.

- The Contractor shall scan the appropriate documents and separator sheets. An inventory shall be performed at the beginning and completion of each "batch" of documents and any discrepancies noted and repaired. Error correction could include rescanning of the documents.

- Provide for the care and cleaning of all Government-Furnished Equipment (GFE) scanning equipment as recommended by the manufacturer. This includes, but is not limited to, loading the feeders, clearing any document jams and removing completed documents.

- Review the scanned documents to verify that the information extracted is accurate and complete. Unacceptable documents shall be rescanned.

- Establish standards, with the approval of the Sponsor, for the preparation, scanning, indexing and equity review of documents.

The Contractor, resident at the Presidential Libraries listed in Section 1.1, shall:

- Review the documents and identify the OGA based on letterhead or prevailing equity in the document. Each document is to be tabbed for the OGA.

- Process documents, which have been reviewed under RAC, for public release.

- Process FOIA and EO Mandatory Requests (MRs).

- Provide ad hoc declassification support at the request of the Library.

3.1.2.2   Remote Archive Capture Deliverables

RAC deliverables include:

- Standards prepared with the approval of the Sponsor for the preparation, scanning, indexing and equity review of documents.

- Meeting annual scanning targets.

- Maintaining and transporting a GFE scanning system. Reconfiguration of this system is subject to COTR approval, and will comply with all Sponsor Security/INFOSEC regulations, policies and procedures.

- Making records scanned under the RAC program available for ASC processing and review by OGAs within 4 weeks of a completed scanning trip.

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- Reports and memoranda on recommendations for quality assurance and/or process improvements.

- Meeting targets for processing FOIAs, MRs, etc. as established by the Presidential Libraries.

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3.1.3   CDC Guidance Development, Quality Assurance and Business Process Improvement

The Contractor shall develop, implement and maintain a CDC program for guidance development, quality assurance and business process improvements in the areas of scanning, review, redaction and declassification of Agency records.

3.1.3.1   CDC Guidance Development Task (TASK 1B)

The Contractor shall:

- Assist the Sponsor in the development of guidance for scanning, indexing, and declassification review in support of TASK 1.

- Research guidance issues, prior information releases and information relevant to declassification topics.

- Maintain and modify, as appropriate, the CDC Declassification Handbook, which contains declassification guidance for use by CDC reviewers. All modifications are subject to Sponsor approval.

- Support the Sponsor Quality Review Board (QRB), including but not limited to, the development of agenda and preparation for meetings. The QRB is an internal CDC forum for decision making and information exchange on declassification guidance and review quality issues. The QRB is chaired by senior Sponsor managers and is composed of senior Sponsor and Contractor personnel.

- Support the Process Improvement Council (PIC), including but not limited to, the development of agenda, presentations and preparation for meetings. The PIC is an internal CDC forum established for the purpose of engaging in continual process improvement. The PIC is chaired by a senior Sponsor manager and is composed of senior Sponsor and Contractor personnel.

- Support the Sponsor in presentations and discussion before the Agency Release Panel (ARP), the IMS forum for declassification policy decision-making. The ARP is chaired by Director/IMS or his designee and is composed of senior IMS personnel.

- Review the quality of CIA equity identification, upon request, in OGA review efforts.

- Provide quality assurance support to the CDC review effort (e.g., develops lists of terms of interest in declassification review process known as "dirty words" as needed, performs "dirty word" searches, etc.).

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3.1.3.1.1   CDC Guidance Development Deliverables

The Guidance Development deliverables include:

- All modifications to the CDC Declassification Handbook, as required.

- Administrative support to the QRB, including preparing the agenda and minutes. The agenda shall be sent two weeks before a meeting and the minutes shall be completed within two weeks after the meeting.

- Administrative support to the PIC including preparing the agenda and minutes. The agenda shall be sent two weeks before a meeting and the minutes shall be completed within two weeks after the meeting.

- Memoranda documenting guidance research findings.

- Monthly updated "dirty word" lists.

- Memoranda summarizing results of documents failing "dirty word" searches and recommended remediation.

- Twice a year, evaluation studies of OGA efforts to correctly identify CIA equities in OGA documents.

3.1.3.2   CDC Quality Assurance Task (TASK 1C)

The Contractor shall:

- Establish standards, with the approval of the Sponsor, for the preparation, scanning, indexing, and reviewing of documents.

- Establish a quality-monitoring program, subject to Sponsor approval, that includes document conversion, document indexing and document review and is designed to identify documents not meeting the quality standard and analyze these documents to determine the cause for errors. The approved program shall be in place within 90 days of contract award and revised as required.

- Provide recommendations to the Sponsor supporting the development of quality assurance policies, procedures and methodologies.

- Work collaboratively with the CDC Metrics Team to ensure all relevant data are collected and processed to support the quality assurance effort in accordance with the approved quality-monitoring program.

- Provide an in-depth analysis of quality metrics data from document conversion and document review for the purpose of showing critical failure points, trends, and other issues that can be gleaned from data collected as part of the quality process.

- Perform quality assurance studies in response to direction from the Sponsor and in support of Contractor initiatives. These studies include, but are not limited to, the

investigation of anomalies such as inadvertent releases. Develop remediation approaches for identified anomalies.

3.1.3.2.1　　　　CDC Quality Assurance Deliverables

The Quality Assurance Deliverables include:

- Memoranda or written reports documenting the quality-monitoring program and recommending quality standards for document conversion, indexing and document review.

- Recommendations for quality and business process improvements and quality assurance policies, procedures and methodologies.

- Results of analyses of quality metrics data.

- Memoranda or written reports documenting the results of quality assurance studies and investigations and associated recommendations, including remediation.

3.1.3.3　　　　CDC Business Process Improvement (BPI) Task (TASK 1D)

The Contractor shall:

- Establish a BPI program that includes document conversion, document indexing and document review and is designed to improve business processes to reduce costs, increase the number of pages processed and/or reviewed and to improve process quality (reducing or eliminating rework).

- Prepare annually a BPI Plan, subject to Sponsor approval, describing the most significant problem areas and the investigations that are planned in the upcoming year. Sponsor will separately approve implementation initiatives.

- Work collaboratively with the CDC Metrics Team to ensure all relevant process data are collected, and processed to support the BPI effort. Analyses of this data shall be provided in accordance with the approved BPI Plan.

- Perform BPI studies in response to direction from the Sponsor and in support of Contractor initiatives. These studies include, but are not limited to, investigation of process anomalies such as defective and/or deteriorating processes. Develop remediation approaches and recommendations.

- Identify and investigate software enhancements and new automation tools in support of TASK 1.

- Research process and technology transfer where appropriate and beneficial between and among the tasks under this SOW.

3.1.3.3.1   CDC Business Process Improvement Deliverables

The Business Process Improvement Deliverables include:

- Annual briefing to Sponsor on the BPI Plan. This briefing is due within 90 calendar days of the contract start and annually 90 days after the anniversary date of contract start. The briefing should include, but is not limited to, planned activities, and recommendations for business process improvement investigations.

- Business process improvement recommendations resulting from the investigations under the plan above or studies in both written and briefing form, as these become available.

- Briefings on the results of BPI studies and/or investigations performed at the request of the Sponsor or in response to Contractor initiatives. Briefings shall include remediation approaches and recommendations.

- Monthly analyses of process metrics data from document conversion and document review for the purpose of evaluating efficiency, examining trends and identifying bottlenecks and process deficiencies amenable to cost-effective improvements. These analyses shall be provided the Sponsor in briefing format.

- Written recommendations and associated briefings proposing new automation tools and software enhancements to existing systems in support of the BPI program.

- Written recommendations and associated briefings proposing process and technology transfer between and among the various tasks under this SOW.

3.1.4   CDC Training Support

The Contractor shall support the Sponsor in training personnel in all relevant business areas of the contract; this includes document conversion, document indexing, document review and use of all manual and automated systems. Other courses shall be provided by the Sponsor with the support of the Contractor, as required, to include, refresher courses. The Sponsor shall reserve the right to prepare and present portions of the training program.

3.1.4.1   CDC Training Tasks (TASK 1E)

The Contractor shall:

- Attend all mission-related training. Exceptions are subject to Sponsor approval.

- Develop and present segments of the declassification review training courses, including refresher training, for contractor and staff personnel. The Contractor shall provide training aids for these training segments.

- At the request of the Sponsor, provide training to OGA personnel on the identification of CIA equity in the declassification review of OGA documents.

3.1.4.2   CDC Training Deliverables

All course, curriculum, and training aids shall be approved by the COTR and are considered deliverables for this contract and are the property of the Sponsor. Training deliverables include:

- Confirmation of attendance at mission-related training for all Contractor personnel. Written approval from the Sponsor is required for all exceptions.
- The Contractor will be called on to support up to six (6) classes in the base year and three (3) classes and three (3) refresher classes in the option years.
- Training materials for the training segments the Contractor is called upon to support. These materials include, but are not limited to, class exercises, student handouts, slides, etc.

3.1.5   Information Technology Service Desk Support

The Contractor shall provide onsite information technology service desk support to users of information review and release systems supporting this SOW. Continuous support shall be provided from 0700 AM to 1700 PM, Monday through Friday through staffing of the Service Desk itself.

3.1.5.1   Information Technology Service Desk Tasks (TASK IF)

The Contractor shall provide first line service desk support to all Contractor and Sponsor users of IMS information review and release systems. The list of systems and brief descriptions of these systems is provided in Appendix 6.

The Contractor shall:

- Assist users with questions related to IMS information review and release systems.
- Create trouble tickets for user problems that cannot be resolved by the Service Desk.
- Work closely with the appropriate technical teams to resolve hardware/software issues.
- Assist users with basic questions on desktop applications that include, but are not limited to, Lotus Notes, and MS Office Suite.
- Create user accounts.

- Represent users at the IMS Engineering Review Board.
- Participate in scheduled and ad hoc meetings.

3.1.5.2 Information Technology Service Desk Deliverables

The Contractor shall provide service desk support. The Contractor shall also provide a report of user service calls that includes a summary of problems and resolutions and a summary of system availability on a weekly basis.

3.2 Support to Other Government Agencies (OGA) Review and Release Programs

The Contractor shall provide information review and release labor support to the National Aeronautics and Space Administration (NASA) and the United States Air Force (USAF). This support includes onsite records handling, performing equity review, providing declassification recommendations, and inputting decisions into an OGA-provided database in accordance to guidance provided by the OGA. Other agencies may be considered for a similar level of support.

3.2.1 OGA Reviewer and Technician Tasks (TASK 1G)

The Contractor shall provide onsite records handling, equity review, and other declassification support to OGAs. Individual taskings will be coordinated with the OGAs by the COTR. The COTR shall approve all individual taskings.

3.2.1.1 OGA Reviewer and Technician Deliverables

The Contractor shall provide all results of equity review and declassification support to OGAs in an approved OGA specified format.

3.3 Support to Non-CDC Information Review and Release (IRR) Programs

The Contractor shall plan, provide, and administer reviewer and technician support as necessary to efficiently and economically meet the annual CIO/IMS targets for review, redaction, declassification and/or release of Agency records in support of FOIA, PA, and EO-MR cases, special searches, historical collections review, special projects and publications review. This may include searches, declassification review, and case management activities.

The Sponsor shall provide the Contractor with declassification guidance and internal administrative procedures, as required.

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3.3.1 Non-CDC IRR Reviewer Tasks (TASK 2)

The Contractor shall provide reviewers with knowledge of intelligence collection and analysis, and subject matter experts for case and/or collection based reviews for mandated and discretionary information review and release programs. They shall be assigned particular tasks consisting of FOIA, PA, EO-MR cases, special searches, historical collections and publications review. (Additional information on the FOIA program is provided in Appendix 4.) In doing so, they will be required to utilize their expertise to accomplish each task. These tasks may include one or more of the elements listed below:

The Contractor shall:

• Review shelf lists, indexes and other finding aids, to identify documents responsive to FOIA, PA, EO-MR, and special search requests and provide the results to the Sponsor.

• Research previous document release decisions as necessary to ensure accuracy and efficiency and provide feedback to the Sponsor.

• Review documents, using the criteria of Executive Order 12958 as amended, the FOIA and PA laws as well as the required review standards of special searches and provide recommendations to the Sponsor regarding the release of responsive documents.

• Manage and redact documents responsive to FOIA, PA, EO-MR, special searches and historical collections electronically using the Management of Officially Released Information (MORI) system and/or the new replacement system, CADRE.

• Consolidate directorate and/or component responses, ensure completeness, and recommend additional directorate and/or OGA taskings and record decisions in MORI and/or CADRE.

• Review nonofficial manuscripts and/or media prepared by current and former Sponsor and Sponsor-contractor personnel to determine if the proposed publication contains classified information via annotations on the manuscript and report the findings to the Sponsor.

• Prepare draft responses to IRR requests and provide to the Sponsor.

The Sponsor is responsible for final declassification decisions and approval for the physical release of records.

3.3.1.1 Non-CDC IRR Reviewer Deliverables

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The deliverables include, but are not limited to a target number of FOIA, PA, EO-MR requests. The Sponsor, in consultation with the Contractor, sets these review and release targets, and associated schedules and requirements at the beginning of each fiscal year or at the initiation of a project. If needed, priorities will be de-conflicted by the Sponsor.

3.3.2 Non-CDC IRR Technician Tasks (TASK 2A)

The Contractor shall provide technicians responsible for case management, document management, administrative support and registry activities in support of the Non-CDC information review and release programs. These tasks may include one or more of the elements listed below:

The Contractor shall:

- Create and maintain hardcopy and electronic FOIA, PA, EO-MR, and special search case files utilizing MORI and/or CADRE that includes requester data, correspondence and tasking activity information as required by the Sponsor.

- Conduct records retirement of case files and document collections on a regularly scheduled basis as directed by the Sponsor.

- Organize, index, reproduce, and maintain document collections responsive to special search and historical collection reviews as requested by the Sponsor.

- Record in MORI and/or CADRE and prepare outgoing coordinations and referrals to OGAs in accordance with standard operating procedures provided by the Sponsor.

- Receive, collate, record, and organize directorate responses to FOIA, PA, EO-MR, special searches, and historical collections and provide to the Sponsor.

- Conduct searches for case information and previously released documents via MORI and/or CADRE and provide results to the Sponsor.

- Provide mail-processing support for the onsite IMS registry Monday through Friday, 6:30AM – 3:30 PM.

- Process incoming and outgoing mail in accordance with Sponsor-provided policies and procedures.

3.3.2.1 Non-CDC IRR Technician Deliverables

The deliverables include, but are not limited to, a target number of requests. The Sponsor, in consultation with the Contractor, sets these review and release targets, and associated schedules and requirements at the beginning of each fiscal year or at the initiation of a project. If needed, priorities will be de-conflicted by the Sponsor.

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3.4 Agency Scanning Center (ASC)

The Contractor shall plan for, provide, and administer technicians and specialists necessary to convert physical records into digital records, index records for subsequent electronic processing, perform automated document duplicate detection, and deliver digital records efficiently and economically. The Agency Scanning Center supports scanning requirements for the CDC, RAC, other CIO/IMS components, ad hoc Agency components and OGAs on a cost reimbursable basis. Periodic domestic travel may be required to support these projects. The ASC has annual scanning targets established by the Sponsor in consultation with the Contractor.

3.4.1 ASC Tasks (TASK 3)

The Contractor shall:

• Record and maintain pertinent data describing material received for processing, including but not limited to the date of receipt, number of physical items, name of receiver, container barcode/tracking number, and transmittal sheet tracking number. Upon completion of processing, customer data will be packaged and returned as instructed by the customer. Occasionally, the Contractor may be required to pickup/return customer data, typically within the Washington Metropolitan Area (WMA). The Contractor's packaging and transport of data will comply with all Sponsor's Security/INFOSEC regulations, policies and procedures.

• Prepare all document pages for scanning by removing bindings such as staples, rubber bands and paperclips. As required, insert bar-coded separator sheets between documents and folders to facilitate the scanning process.

• Decide which scanning device will properly perform the operations depending on the type and quality of documents to be imaged. The operator shall load the feeders, clear any document jams, and remove completed documents. An inventory shall be performed at the beginning and completion of each "batch" of documents and any discrepancies noted and repaired. Error correction could include rescanning of the documents. The Contractor shall be responsible for daily care and cleaning of all scanning equipment as recommended by the manufacturer.

• Review the scanned document images electronically to verify that all pages within the document were scanned accurately and completely. The review shall include a 100% verification of each scanned page image to ascertain the image quality. Rescanning of documents will be required if the scanned images are deemed to be of poor quality or incomplete.

• Follow instructions provided with each batch of documents to capture associated metadata. Examples of document metadata include title/subject, publication date,

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document type, classification, etc. The Contractor shall enter metadata into the project specific database for each document as required. The number of metadata elements required for a batch will vary from project to project.

- Provide a quality review of the indexed metadata information to verify that the metadata is appropriate and correct for each record. For invalid metadata entries, the Contractor shall edit the entry and provide the correct metadata, based upon the customer's requirements. Feedback regarding the quality of the initial indexing of each batch shall be provided to the ASC Site Manager.

- For certain projects, edit the resulting textual output from documents processed through Optical Character Recognition (OCR) software, provided by the Sponsor. Based upon customer requirements, the Contractor shall validate and correct individual characters/words that were processed incorrectly by the OCR software.

- At the Sponsor's request, electronically review a subset of newly processed documents, identified by the Sponsor, that are identified as potential duplicate documents in the existing document repository. The Contractor shall review document metadata and document images identified by Sponsor-provided software (Duplicate Document Resolution, DDR, see Appendix 6) to determine potential duplicates. The Sponsor shall provide training in duplicate document detection processing.

- Provide support to ad hoc records conversion requirements.

- Participate in scheduled and ad hoc meetings.

3.4.1.1   ASC Deliverables

The Contractor shall deliver scanned pages in electronic format and meet scanning targets and deadlines. The Sponsor, in consultation with the Contractor, sets these review and release targets, and associated schedules and requirements at the beginning of each fiscal year or at the initiation of a project. If needed, priorities will be de-conflicted by the Sponsor.

3.4.2   ASC Data Management

The Contractor shall provide O&M support to the existing automated systems and other automated systems developed under the purview of the ASC. The existing systems were developed to support conversion of hard copy records to electronic format (to include document indexing and QA/QC tools) and full text search capability of electronic records. These systems were developed primarily using Oracle 9i, Microsoft Visual Basic 6, Microsoft Visual C++ and Visual Studio.net. Many of the systems make use of 3rd party OCR toolkits such as Prime Recognition, Nuance, Expervision, and IRIS as well as imaging toolkits such as Snowbound, TMS Sequoia, and Accusoft.

3.4.2.1 ASC Data Management Tasks (TASK 3A)

The Contractor shall:

• Capture, archive, distribute, manage, and perform quality assurance of all image and metadata to include indexing consistency. This responsibility includes, but is not limited to, stewardship of all image and metadata from entry into the ASC to production release.

• Act as the focal point for prompt resolution of problems and recognize, track, and solve problems with data within the production system and ensure data integrity. The Contractor shall also be the focal point for continual process improvements to streamline production efforts and reduce costs. System changes are subject to approval by the Cognizant Government Manager (CGM) and COTR.

• Maintain the existing document conversion system (hardware and software). This system supports paper and microform scanning, indexing of metadata, quality assurance of images and metadata and OCR processes.

• Maintain a transportable record conversion system, separate from the system used by the RAC program. Configuration of this system is subject to CGM and COTR approval, and will comply with all Sponsor's Security/INFOSEC regulations, policies and procedures. .

• Upon the Sponsor's request and approval, develop, maintain and document, image and metadata processing automated tools in support of information review and release.

3.4.2.1.2 ASC Data Management Team Deliverables

The Contractor shall maintain all existing ASC document image automated systems and tools. Recommendations to modify existing systems and/or implement new systems shall be submitted for Sponsor approval. The Contractor shall further document, deliver and maintain all new ASC document image automated systems and tools. The system and tool documentation shall be in accordance with CIO/IMS standards. These deliverables are considered property of the Sponsor.

The Contractor shall meet deadlines as established by the Sponsor in consultation with the Contractor. If needed, priorities will be de-conflicted by the Sponsor.

3.5 Agency Archives and Records Center (AARC)

The Contractor shall provide a staff of technicians who are responsible for retiring records and performing systematic destruction of records according to a Sponsor-provided Record Control Schedule (RCS) and provide archival and records center

support in response to customer requirements. All personnel shall be able to move cages/carts with 300-500 lbs of records, lift cartons weighing up to 35 lbs, and move shrink-wrapped pallets with a power jack and other operating dock equipment (lift gates), as required.

3.5.1   AARC Support Tasks (TASK 4)

The Contractor shall:

• Maintain accurate indices and other finding aids using a GFE automated system (SMART2, see Appendix 6) to ensure the AARC inventory is adequately controlled.

• Conduct inventories.

• Maintain authorized classification access to inactive records.

• Respond to customer archival and records center requirements accurately and within established deadlines.

• Attend Sponsor-scheduled meetings.

• Efficiently manage office processes and record systems.

• Give presentations/tours to AARC visitors as required.

3.5.1.2   AARC Deliverables

AARC deliverables include timely and accurate inventories, responses to customer archival and records center requests; the updating of the GFE automated system (SMART2); and presentations/tours as required. The Sponsor, in consultation with the Contractor, will establish timelines and accuracy standards for requests.

3.6   Air Force Declassification Office (AFDO) Pilot

3.6.1   Microfilm Digitization and Declassification Support

• Please reference SIRR Attachment B.

Section 4: Administrative Deliverables

4.0 Monthly Reporting

The reports defined in 4.2 and 4.5 are currently produced by Sponsor's automated system (TeamMetrix, see Appendix 6). The system will be made available for Contractor's use.

4.1 Monthly Cost Report

The Contractor's Program Manager shall prepare mutually acceptable monthly reports as of the last day of the month and due to the Contracting Officer (CO) and COTR by the fifteenth (15th) day of the following month. These reports shall include, but are not limited to:

- Period of Performance.
- Accomplishments during the reporting period.
- Plans for the next reporting period.
- Costs incurred during the reporting period.
- A comparison of dollars planned with dollars expended by month and cumulatively to-date.
- A comparison of FTE hours planned with FTE hours expended by month and cumulatively to-date, by category.
- Justification for any variances in planned costs versus actual costs for the month.
- Concerns, issues, and recommendations.

4.2 Monthly SIRR Labor Support Cost Report

The Contractor's Program Manager shall prepare mutually acceptable monthly reports as of the last day of the month and due to the CO and COTR by the fifteenth (15th) day of the following month. These reports shall include but are not limited to:

- Cost and Funding Summary, 25-Year Program Totals
- Monthly Dollars vs. Monthly Average Dollars Charts
- Monthly Hours vs. Monthly Average Hours Charts
- Cost & Funding Summary, Non-CDC IRR Projects

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- Cost & Funding Summary, ASC Special Projects
- Cost & Funding Summary, All Others
- RAC Support Monthly Details.
- Travel Expense Costs Monthly Detail.
- Monthly Costs by Organizational Structure
- Cumulative Costs by Organizational Structure
- Monthly Hours by Organizational Structure
- Cumulative Hours by Organizational Structure
- Program Management Office (PMO) Cost Summary

4.3 Monthly Cost Meeting

The Contractor shall hold a monthly cost meeting with the Sponsor to review, in detail, the monthly expenditures reported above. Staffing requirements shall also be addressed at that time.

4.4 Weekly Reports

The Contractor shall provide the Sponsor a SIRR Weekly Report that details all significant events from the prior week. The report should also provide the planned activities for the coming week, as well as address any anticipated personnel changes.

A supplement to the SIRR Weekly Report, the AARC Weekly Report is to include the following:

- AARC statistics for inclusion in an activity report.
- Detailed list of accomplishments.
- List of safety issues.
- List of driving & vehicle incidents.

Additionally, the ASC Weekly will supplement the SIRR Weekly report. The ASC Weekly Report is due to the ASC CGM by COB every Tuesday and will include the following:

- ASC technician/specialist identified by name with cumulative weekly hours aligned by task and activity
- Total all hours by task, activity, person and FTE

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- Information pertaining to all batches processed in the ASC during the week to include:
- Process
- Task
- Batch Number
- Job Number
- Box Number
- Number of Documents
- Number of Images
- Total Number of Documents by Process
- Total Number of Images by Process
- Summary of Indexing Quality Results

The SIRR Weekly Report is due no later than 10:00 AM every Thursday.

4.5   Management Accounting System (MAS)

The Contractor shall provide to the Sponsor on a weekly basis accurate labor hours and costs by person, labor category (i.e., Reviewer, Expert Reviewer, Technician, etc.), Sponsor organization of assignment (i.e., CDC, PIPD, etc.). In addition, the Contractor shall provide labor hours and costs on a weekly basis according to a taxonomy of activities and tasks (projects). Activities will fall into one of three classes:

- Direct: Activities associated with document conversion, document review, product generation, and referral processing, etc.

- Indirect: Activities that support direct activities such as training, surveying, IT development, etc.

- Overhead: Activities that are not directly tied to production such as administrative requirements, general meetings, time off, etc.

The Contractor shall provide these data in a Government-provided format on a weekly basis via data entry into a GFE automated system accessible on the Agency Secure Network (ASN). Weekly data shall be made available to the Sponsor in the system by COB Friday of the following week. The Contractor will be responsible for generating standard reports from the system as required by the Sponsor. These reports will be monthly or ad hoc. Monthly reports shall be due no later than the fifteenth (15th) day of the following month.

Section 5: Key Personnel Qualifications and Experience

5.0 Key Personnel Qualifications

The following are considered Key Personnel. These personnel are considered essential to the success of the contract and the Sponsor's overall effort under this SOW. The Contractor shall select qualified individuals to fill and, if necessary, re-fill these positions and make every effort to retain the Key Personnel in their positions.

All Key Personnel performing tasks in support of this SOW except the USAF Program Key Person (SOW para. 5.8 below) are required to have an Industrial Security Staff Approval/Top Secret (ISSA/TS) clearance at contract award. An ISSA/TS clearance is based upon a full Special Background Investigation (SBI) and a polygraph interview. The USAF Program Key Person is required to have a Permanent DOD Top Secret clearance at contract award.

The Contractor shall notify the Sponsor thirty (30) calendar days in advance of any changes in the Key Personnel and shall replace, with the replacement subject to approval of the COTR, all Key Personnel who leave the effort within thirty (30) calendar days.

Note: Equivalent work experience at a supervisory or technical expert level in a field relevant to this SOW may be substituted for the formal education qualifications for the purposes of this SOW: two (2) years experience for each one (1) year of college (e.g., eight (8) years experience equals a bachelor's degree, etc.)

5.1 SIRR Program Manager (SIRR-PM)

The Contractor shall provide a *SIRR Program Manager (SIRR-PM)* who shall be responsible for the successful completion of all tasks described in this SOW. He/she shall be responsible for reporting to the Sponsor and be present at weekly staff meetings and other status meetings as required by the COTR. The individual proposed shall be an employee of the prime Contractor with full authorities of the Contractor.

The duties of the SIRR-PM are as follows:

- Plan, organize and manage the overall activities of the Contractor effort to successfully accomplish all tasks required in this SOW (i.e., program management, declassification review, information review and release support, technical work, guidance support, quality assurance, scheduling, and cost management, etc.)

- Act as primary interface with the Sponsor and be responsible for reporting to the COTR concerning production requirements performed under the contract, costs and cost control, problem resolution, and operational planning.

- Responsible for all recruitment, staffing and retention of personnel under the contract.

- Ensure that all Contractor-performed activities operate in conformance with the terms and conditions of the contract and serve as a liaison between the CO and/or the COTR and the Contractor corporate management.

Mandatory Experience

Six (6) years of management and oversight of a staff (similar in scope and resources to the SIRR effort) that performed production/processing operations in support of Government and/or private industry activities. Specific experience required includes:

- Management of contracts with classified work products, explicit periodic goals, deadlines and metrics.

- Project management experience with a program similar in scope and resources to the SIRR effort.

- Demonstrated ability to interact at all private industry and/or Government organizational levels.

- Financial accountability for a program similar in scope and resources to the SIRR effort.

- The ability to make effective presentations to Government and Contractor audiences.

- Demonstrated experience with quality assurance programs.

Desirable Experience
Experience in the following is highly desirable but not required:

- Experience with information review and release as described in this SOW.

- Experience as an intelligence analyst, intelligence collector or in a related support position.

- More than six (6) years experience in production operations, including managing workflow and assignment.

Mandatory Education

Bachelor's degree or equivalent from an accredited institution in a field directly related to:

- Foreign relations, history, political science, area studies, language studies, physical or social sciences or comparable discipline relevant to the SIRR effort; or

- Engineering management, production operations, computer resources/information systems management, library science, business administration or comparable discipline.

General Professional Qualifications include the following:

- Successful record of accomplishment in assignments of increasing responsibility.

- Superior management and leadership skills.

- Excellent written communication skills.

- Excellent oral communication skills.

- Excellent interpersonal skills; ability to work well with Government, subordinates, and other non-governmental personnel.

5.2   SIRR- Operations Manager (SIRR-Ops Mgr)

The Contractor shall provide a *SIRR-Operations Manager (SIRR-Ops Mgr)* who shall be responsible for overseeing and facilitating the document review, technical support and quality control under the SOW. He/she shall work with the SIRR-PM and the Sponsor in the completion of these duties and be present at weekly staff meetings and other status meetings as required by the COTR and/or Cognizant Government Managers (CGMs). The individual proposed shall be an employee of the prime Contractor with full authorities of the Contractor.

The duties of the SIRR-Ops Mgr are as follows:

- Assist the SIRR-PM in overseeing the day-to-day activities of the SIRR effort (i.e., declassification review, program management, technical work, guidance development, quality assurance, production control, scheduling, and cost management, etc.)

- In conjunction with the SIRR-PM, act as an interface with the Sponsor, reporting routinely to the COTR and the CGMs concerning SIRR effort.

- Focus specifically on the recruitment, staffing and retention of reviewer personnel under the SOW.

- Actively engage in quality assurance and business process improvement under the CDC portions of the SOW.

- Assist the CGMs in improving coordination and ensuring the use of "best practices" in the guidance, business process and quality assurance aspects of the various review programs under the SOW.

Mandatory Experience

Four (4) years of management and oversight of a staff (similar in scope and resources to the SIRR effort) that performs production/processing operations in support of Government and/or private industry activities, including:

- Management of contracts with classified work products, explicit goals, deadlines and metrics.

- Project management responsibility.

- Interaction at all private industry and/or Government organizational levels.

- Financial accountability.

- Presentations to Government and Contractor audiences.

Desirable Experience

Experience in the following is highly desirable but not required:

- Four (4) years of senior-level experience as an intelligence analyst or intelligence collector or in a comparable intelligence-related position with a policy focus.

- Two (2) years information review and release experience as described in this SOW (or comparable experience as determined by the Sponsor).

- More than four (4) years experience in production operations, including managing workflow and assignment.

Mandatory Education

Bachelor's degree or equivalent from an accredited institution in a field directly related to:

- Foreign relations, history, political science, area studies, language studies, physical or social sciences or comparable discipline relevant to the SIRR effort; or

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- Engineering management, production operations, computer resources/information systems management, library science, business administration or comparable discipline.

General Professional Qualifications include the following:

- Successful record of accomplishment in assignments of increasing responsibility.

- Superior management and leadership skills.

- Excellent written communications skills.

- Excellent oral communications skills.

- Excellent interpersonal skills; ability to work well with Government, subordinates, and other non-governmental personnel.

5.3   SIRR-CDC Guidance Coordinator (SIRR-CDC GC)

The Contractor shall provide a *SIRR-CDC Guidance Coordinator (SIRR-CDC GC)* who shall be responsible for all CDC guidance support tasks and deliverables (paras 3.1.3.1 and 3.1.3.1.1) described in the CDC portion of the SOW. The GC shall consult with the Sponsor in accordance with his/her duties and be present at weekly staff meetings and other meetings as required by the COTR and/or CGMs. The duties of the SIRR-CDC GC are as follows:

- Assist the Sponsor in the development of guidance in support of the CDC portion of this SOW.

- Research guidance issues, prior information releases and information relevant to declassification topics.

- Maintain the CDC Declassification Handbook, which contains declassification guidance for use by CDC reviewers.

- Participate in and provide administrative support for the Sponsor QRB.

- Participate in and provide administrative support for the Sponsor PIC.

- Participate in and provide administrative support for the Sponsor in presentations and discussion before the ARP.

- Provide training, as required, to CDC and other IMS personnel, on guidance and referral issues.

- Provide training to OGA personnel on the identification of Sponsor's equity in the declassification review of OGA documents. Review the quality of Sponsor equity identification, upon request, in OGA review efforts.

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- Provide quality assurance support to the CDC review effort (e.g., develop "dirty word" lists as needed; perform "dirty word" searches).

Mandatory Experience

- Ten (10) years senior-level experience as an intelligence analyst or intelligence collector or in a comparable intelligence-related position with a policy focus.
- Five (5) years experience in information review and release as described in this SOW (or comparable experience as determined by the Sponsor).

- Experience giving successful presentations on complex issues to Government and Contractor audiences.

Desirable Experience

Experience in the following is highly desirable but not required:

- More than five (5) years information review and release experience as described in this SOW (or comparable experience as determined by the Sponsor).

- More than ten (10) years senior-level experience as an intelligence analyst or intelligence collector or comparable intelligence-related position with a policy focus (as determined by the Sponsor.)

- Declassification review guidance development.

- Performing quality assurance work in a production environment.

- Experience as a classroom trainer.

- Development of training aids.

Mandatory Education

Bachelor's degree or equivalent from an accredited institution in a field directly related to:

- Foreign relations, history, political science, area studies, language studies, physical or social sciences or comparable discipline relevant to the SIRR effort; or

- Engineering management, production operations, computer resources/information systems management, library science, business administration or comparable discipline.

General Professional Qualifications include the following:

- Excellent oral and briefing communications skills.

- Excellent written communication skills.

- Excellent interpersonal skills; ability to work well with Government, Contractor and other non-governmental personnel.

5.4   SIRR-CDC Quality Assurance Manager (SIRR-CDC QAM)

The Contractor shall provide *a SIRR-CDC Quality Assurance Manager (SIRR-CDC QAM)* who shall be responsible for CDC quality assurance support tasks and deliverables (paras 3.1.3.2 and 3.1.3.2.1) described in the support to CDC portion of the SOW. He/she shall consult with the Sponsor in accordance with assigned duties and be present at weekly staff meetings and other meetings as required by the COTR and/or CGMs. The SIRR-CDC QAM shall provide the Sponsor critical and unbiased reviews of product quality, and recommendations as to how product quality may be continuously improved. The duties of the SIRR-CDC QAM are as follows:

- Support the Sponsor QRB.

- Support the Sponsor PIC.

- Establish quality-monitoring programs for document conversion, document indexing, and document review designed to identify documents not meeting the quality standard and to analyze these documents to determine the source of errors.

- Assist the Sponsor in the development of quality assurance policies, procedures, standards, and methodologies in support of the CDC portion of the SOW and the overall goals of the contract.

- Work with the independent CDC Metrics Team to ensure all relevant data are collected and processed to support the quality assurance effort.

- Provide an in-depth quality analysis of data showing critical failure points, trends, and other issues, derived from document conversion and review.

- Investigate quality assurance anomalies including inadvertent releases. Develop remediation approaches as part of business process improvements.

- Provide training, as required, to CDC and other IMS personnel on quality assurance procedures.

Mandatory Experience

(Note: Experience requirements below may be satisfied on the same project/task)

- Four (4) years experience using analytic and statistical methodologies to study business processes.
- Four (4) years experience performing quality assurance and related studies.

Desirable Experience

Experience in the following is highly desirable but not required:

- Information review and release experience as described in this SOW (or comparable experience as determined by the Sponsor).
- Experience as an intelligence analyst or intelligence collector or in a comparable intelligence-related position.

Mandatory Education

Bachelor's degree or equivalent from an accredited institution in a field directly related to:

- Engineering, statistics, industrial psychology, operations research or other discipline related to quality assurance or control, organizational behavior, process improvement, etc.;
- Engineering management, production operations, computer resources/information systems management, business administration (with a quantitative minor);
- Other discipline in which statistical methodologies played a significant role in the candidate's studies (provide details).

General Professional Qualifications include the following:

- Experience with databases and statistical manipulation software.
- Demonstrated analytical skills; ability to dissect complex issues and develop novel solutions.
- High level of initiative, ability to conceive of a project and follow through with minimum Sponsor oversight.

- Successful record of accomplishment in assignments of increasing responsibility.

- Excellent oral communications skills; ability to present complicated issues to a lay audience in a non-threatening way.

- Excellent briefing skills.

- Excellent written communications skills.

- Excellent interpersonal skills; ability to work well with Government, Contractor, and other non-governmental personnel.

5.5   SIRR-Agency Scanning Center Site Manager (SIRR-ASC SM)

The Contractor shall provide a *SIRR-Agency Scanning Center Site Manager (SIRR-ASC SM)* who shall be responsible for ensuring daily ASC production (e.g., document preparation, document conversion, indexing, etc) meets Sponsor requirements. The ASC SM shall coordinate with the CGM on production priorities, throughput, deliverables and costs. The ASC SM shall be responsible for managing multiple ongoing and ad hoc conversion projects, all with unique processing requirements. The ASC SM shall also be responsible for coordinating support to RAC scanning trips to various domestic locations. The ASC SM shall provide guidance to all ASC projects. He/she shall be responsible for ensuring the final product meets all quality standards as established by the customer in coordination with the Sponsor. He/she shall provide production metrics, data and reports as required by the Sponsor. He/she shall represent the ASC and participate in formal meetings and ad hoc technical exchanges as required. He/she shall provide consulting services and be present at weekly staff meetings and other status meetings as required by the COTR and/or CGM. The individual proposed shall be an employee of the prime Contractor with full authorities of the Contractor.

The duties of the SIRR-ASC SM are as follows:

- Plan, organize, and manage the overall activities of the SIRR-ASC support effort (i.e., overseeing Contractor day-to-day activities, including document preparation, document conversion, and indexing; also being responsible for program/project management and planning, technical work, ASC policy and procedures development, quality assurance, training, production control, scheduling, costs, etc.)

- Oversee technicians' activities other than document conversion in support of CDC operations, such as automated duplicate detection and resolution.

- Act as primary ASC operations interface with the Sponsor and consult routinely with the CGM concerning SIRR-ASC support efforts, including production planning and control, problem resolution, costs and cost control, etc.

Mandatory Experience

Note: The experiences described below may be in the same qualifying position.

- Two (2) years of management and oversight of a staff (similar in scope and resources to the SIRR ASC effort) that performed production/processing operations in support of Government and/or private industry activities, including:

  – Management of projects with explicit goals, deadlines, and metrics.

  – Project management experience.

  – Demonstrated experience with quality assurance programs.

- One (1) year experience in the document conversion business area or its equivalent as determined by the Sponsor. This experience can be in government or industry.

Desirable Experience

Experience in the following is highly desirable but not required:

- More than two (2) years experience in oversight of production/processing operations as described in this SOW (or comparable experience as determined by the Sponsor.)

- More than one (1) year experience in the document conversion business area (or comparable experience as determined by the Sponsor.) This experience can be in government or industry.

- More than two (2) years supervisory experience providing oversight to technician and specialist category-type employees.

Mandatory Education

Associate's degree or equivalent from an accredited institution in a field directly related to:

- Engineering management, production operations, computer resources/information systems management, library science, social science or business administration.

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General Professional Qualifications include the following:

- Successful record of accomplishment in assignments of increasing responsibility.

- Strong management and leadership skills.

- Effective written communications skills.

- Effective oral communications skills.

- Excellent interpersonal skills; ability to work well with Government, subordinates, and other non-governmental personnel.

5.6 SIRR-ASC Engineering & Operations Support Manager (SIRR-ASC EOSM)

The ASC Engineering and Operations Support Manager (ASC EOSM) is responsible for the design, development, operations and maintenance and operational support of the automated systems utilized throughout the ASC as well as the Remote Archive Capture (RAC) program. He/she also develops tools on an ad hoc basis to support specialized automated review and quality assurance projects within CDC. He/she is responsible for analyzing and enhancing the workflow software within the ASC to support process improvement. The ASC EOSM is responsible for the data management tasks within the ASC.

He/she shall be responsible for ensuring final products meet all programmatic and quality standards as established by the customer. He/she shall provide production metrics, data and reports as required by the Sponsor. He/she shall provide consulting services and be present at weekly staff meetings and other status meetings as required by the COTR and/or CGM. He/she shall be responsible for meeting project deadlines, as established by the Sponsor in consultation with the Contractor.

The duties of the SIRR-ASC EOSM are as follows:

- Design, develop, document, test and provide training on automated systems utilized throughout the ASC and the RAC program.

- Design, develop, document, test and provide training on specialized automated systems utilized throughout CDC supporting automated review and quality assurance.

- Provide operations and maintenance support as well as data base administration support on existing and new systems developed by the ASC EOSM under this SOW.

- Provide production metrics, data and reports for all systems developed or maintained by the ASC EOSM under this SOW.

- Use an appropriately tailored CIO/IMS project management methodology.

- Ensure that all systems developed by the EOSM meet Sponsor security and INFOSEC standards.

Mandatory experience

Experience in the following is required:

- Five (5) years software development experience with emphasis on document imaging and production operations software.

- Two (2) years experience in the document conversion business area or its equivalent as determined by the Sponsor. This experience can be in government or industry.

- Two (2) years experience with the following software and hardware:

  – Commercial Off-the-Shelf (COTS) development toolkits for document imaging and conversion.

  – Turnkey software to support document scanning, indexing and formatting.

  – COTS development tools for OCR recognition libraries, image formatting and manipulation.

  – Paper and microform scanning devices.

  – Designing and implementing relational databases such as Oracle 9/10.

  – Programming languages, applicable to image and data manipulation.

Desirable Experience

Experience in the following is highly desirable but not required:

- More than five (5) years software development experience with emphasis on document imaging and production operations software.

- More than two (2) years experience in the document conversion business (or comparable experience as determined by the Sponsor.) This experience can be in Government or industry.

- More than two (2) years experience with the following software and hardware:

  – COTS development toolkits for document imaging and conversion.

  – Turnkey software to support document scanning, indexing and formatting.

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- COTS development tools for OCR recognition libraries, image formatting and manipulation.
- Paper and microform scanning devices.
- Designing and implementing relational databases such as Oracle 9/10.
- Programming languages, applicable to image and data manipulation.

Mandatory Education

Bachelor's degree or equivalent from an accredited institution in a field directly related to:

- Engineering management, production operations, computer science/information systems management, or business administration or comparable field (with emphasis on computer applications).

General Professional Qualifications include the following:

- Successful record of accomplishment in assignments of increasing responsibility.
- Effective project management skills.
- Excellent interpersonal skills; ability to work well with Government, Contractor, and other non-governmental personnel.
- Effective oral and written communications skills.

5.7 SIRR Agency Archives and Records Center (AARC) Site Manager (SIRR AARC-SM)

The Contractor shall provide a *SIRR-AARC Site Manager (SIRR-AARC SM)* who shall be responsible for overall management and oversight of all AARC-related activities under this SOW. He/she shall provide consulting services/guidance on current business trends as well as policy/procedures and technologies that relate to AARC operations. The AARC SM shall be present at weekly staff meetings and other status meetings as required by the COTR and/or CGM. The individual proposed shall be an employee of the prime Contractor with full authorities of the Contractor.

The duties of the AARC SM are as follows:

- Plan, organize and manage the overall activities of the AARC support efforts under this SOW (i.e., day-to-day supervision of AARC technicians, SIRR-AARC policy, technical work, production control, scheduling, staffing and costs, etc.)

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- Act as a onsite primary interface with the Sponsor, consulting routinely with the COTR and the CGM concerning SIRR-AARC production planning and execution, problem resolution, scheduling, Contractor staffing and retention, costs and cost control, etc.

- Initiate, monitor, and coordinate all AARC taskings.

- Manage Contractor personnel to meet the AARC's mission.

- Provide training to the AARC Contractor cadre.

- Maintain accurate indices and other finding aids to ensure the AARC inventory is adequately controlled.

- Provide guidance on routine and special tasks to the AARC Contractor cadre.

- Assess potential problems/issues and recommend solutions.

- Ensure only authorized personnel have access to inactive records.

- Maintain knowledge/awareness of current business trends as well as policy/procedures and technologies that relate to AARC operations.

Mandatory Experience

Two (2) years supervision of a staff (similar in scope and resources to the SIRR AARC effort) that performs production/processing operations in support of Government and/or private industry activities.

Desirable Experience
Experience in the following is highly desirable but not required:

- More than two (2) years supervision of a staff (similar in scope and resources to the SIRR AARC effort) that performs production/processing operations in support of Government and/or private industry activities.

- Transferable skills/experience applicable in an archives or records center.

Mandatory Education

Associate's degree or equivalent from an accredited institution in a field directly related to:

- Engineering management, production operations, computer resources/information systems management, library science, business administration, physical or social sciences or comparable discipline.

General Professional Qualifications include the following:

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- Strong customer service skills.

- Successful record of accomplishment in positions of increasing responsibility.

- Strong supervisory and leadership skills.

- Effective organizational skills and initiative to ensure efficient management.

- Attention to detail.

- Basic computer skills to include manipulation of databases, spreadsheets and e-mail.

- Strong oral and written communications skills.

- Excellent interpersonal skills; ability to work well with Government, subordinates and other non-governmental personnel.

- Able to meet requirements of a position that regularly requires incumbent to lift and move boxes of capacity up to a cubic foot weighing up to 35 lbs.

- Have a valid driver's license for delivering records using Government transportation within WMA.

5.8   SIRR- USAF Lead Reviewer (USAF Review and Release Program) (SIRR USAF-LR)

The Contractor shall provide a *SIRR-USAF Lead Reviewer* (SIRR USAF-LR) for the USAF program who shall be responsible for overseeing and facilitating document review, technical support and quality control. He/she will conduct training for new personnel, resolve issues associated with declassification/classification questions, and perform quality control. He/she shall work with the USAF in the completion of these duties and be present at staff meetings as required by the USAF, COTR and/or Cognizant Government Managers (CGMs). The SIRR USAF LR shall meet the Minimum Qualifications and the General Professional Qualifications of the Expert Reviewer category described in para. 6.1.

Section 6: Non-Key Personnel Duties, Qualifications and Experience

6.0   Non-Key Personnel

The Contractor shall select and assign to this program only those personnel who are well trained, knowledgeable, experienced and proficient and meet the security and minimum qualifications as outlined in this section. The Contractor shall provide the COTR with copies of resumes of personnel new to the contract 10 calendar days prior to their start on the contract.

All Contractor personnel performing tasks in support of this SOW except USAF Program personnel are required to have an Industrial Security Staff Approval/Top Secret (ISSA/TS) clearance. An ISSA/TS clearance is based upon a full Special Background Investigation (SBI) and a polygraph interview. USAF Program personnel are required to have a permanent DOD Top Secret clearance.

6.1   Reviewers

Two categories of reviewers, *Reviewer and Expert Reviewer*, are required to support the review and release tasks. The duties of all reviewers may include the following:

- Compile, organize, and review case files, special projects, or other proposed Agency releases for accuracy and completeness.

- Create final responses to the public.

- Perform quality review of own work, other reviewers or programs.

- Review, and where appropriate, redact Sponsor record holdings and referred equities, recommending continued protection or release of specific information in accordance with Sponsor declassification guidelines and policies and following established procedures.

- Follow established procedures closely in checking appropriate release or protect decisions, in identifying equities for external referral to OGAs, and in final review for quality and completeness of outgoing product.

- Manage the referral process for OGA equity.

- Meet or exceed production targets and/or other criteria established by the Sponsor in consultation with the Contractor.

- Participate and assist in research and guideline activities.

- Subject to Sponsor guidance, survey, research, and identify records suitable for further review and release.

- Engage in regular contact with internal and external customers.

In addition to the duties outlined above, the duties of *Expert Reviewers* include the following:

- Develop and implement quality assurance checks and conduct quality control activities to review and determine the suitability of review decisions.

- Research, develop, and recommend new policies, review guidelines, and review procedures.

- Recommend declassification review projects through the identification, analysis, and prioritization of collections for Sponsor approval.

- Produce analytic and decision memoranda for release projects and give Contractor and Sponsor management critical and unbiased recommendations.

- Perform quality assurance reviews of documents prepared for release to the public to ensure that guidelines followed and redactions made are proper and consistent, and that the final product is error-free.

- Review, determine, and correct the suitability of review decisions.

- Act as a review team lead; organize special projects and oversee team; and/or perform unique individual assignments.

- Oversee and mentor less-experienced analysts in the review and determination of review decisions.

- Make critical and unbiased recommendations to managers using past precedent and extrapolations of previously approved material.

Minimum Qualifications

The minimum qualifications for *Reviewers* are the following:

- Ten (10) years of Sponsor or Intelligence Community experience or comparable national security experience.

  o   For the USAF program, USAF experience (or comparable experience) is considered Sponsor experience.

- Four (4) years of senior-level experience as an intelligence analyst or intelligence collector or comparable intelligence-related position with a policy focus; or two (2) years information review and release experience as described in this SOW (or comparable experience.)

o   For the USAF program, USAF experience with a policy focus may be substituted for intelligence-related experience.

- Subject matter expertise or in-depth experience.
- Proven research and interpretative skills, familiarity with research methodology.
- Experience with Microsoft Office Suite.

The minimum qualifications for *Expert Reviewers* are the following:

- More than ten (10) years of Sponsor or Intelligence Community experience or comparable national security experience.

o   For the USAF Program, USAF experience (or comparable experience) is considered Sponsor experience.

- Multi-directorate or multi-office Sponsor or Intelligence Community experience; or more than four (4) years senior-level experience as an intelligence analyst or intelligence collector or comparable intelligence-related position with a policy focus.

o   For the USAF program, USAF experience (or comparable experience) with a policy focus may be substituted for Sponsor or intelligence-related experience above.

- More than two (2) years information review and release experience as described in this SOW (or comparable experience).
- Demonstrated understanding of declassification and release programs (e.g. 25 Year Program, FOIA, Special Searches, etc.) policies, guidance, procedures, and precedents.
- Subject matter expertise or in-depth experience.
- Proven research and interpretative skills, familiarity with research methodology.
- Experience with Microsoft Office Suite.

General Professional Qualifications for *Reviewers and Expert Reviewers* include the following:

- Highly organized.
- Detail oriented.
- Excellent interpersonal skills.

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- Ability to rapidly read and assimilate information for consistent and accurate decision-making.

- Excellent written and oral communication skills.

- The ability to present information quickly and concisely.

Expert Reviewers should also demonstrate:

- Proven management and leadership skills.

- Knowledge of intelligence bibliography, historical and current events, and Sponsor history (USAF history for participants the USAF Program).

6.2   Technical Support Labor

Three levels of technical support are required to support the tasks under this SOW, *Level 1 and Level 2 Technicians and Specialists*. They shall have the following general professional qualifications:

- Strong computer operating skills.

- Experience with office equipment.

- Strong keyboarding skills.

- Effective administrative skills including record keeping, preparing reports, and general administrative duties in support of team operations.

- Effective interpersonal skills and the ability to work well as a team member, sharing information and knowledge with team.

- Ability to rapidly become familiar with the various information review and release automated systems used in the performance of their tasks.

- Strong customer service skills.

- Ability to adapt to changing work requirements and priorities.

- Ability to work independently or with minimal supervision.

- Detail oriented.

- Able to meet requirements of a position that regularly requires the individual to lift and move boxes of capacity up to a cubic foot weighing up to 35 lbs.

- For personnel supporting the AARC, have a valid drivers license for delivering records using Sponsor transportation within WMA.

- For personnel supporting the AARC, be able to move cages/carts with 300-500 lbs. of records and move shrink-wrapped pallets with a power jack and other operating dock equipment (lift gates) as required.

In addition, Level 2 *Technicians* shall have the following general professional qualifications:

- Ability to communicate clearly and effectively with Contractor and Sponsor management.
- Excellent problem solving skills.
- Ability to rapidly master overall production workflow.

In addition to qualifications listed for *Level 1 and Level 2 Technicians, Specialists* shall have the following general professional qualifications:

- Excellent computer skills.
- Working knowledge of typical desktop applications that include Lotus Notes, and MS Office Suite.
- Basic database administration skills.
- Ability to learn to operate new computer devices/software and other hardware.

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Section 7: Transition Period

7.0   Transition Approach

The Contractor shall provide the Sponsor a transition briefing no later than fifteen (15) calendar days after contract award describing actions, risk identification and mitigation, plans and procedures that will ensure a smooth transition from contract start, initial operational capability (IOC), to full operational capability (FOC). The Contractor shall facilitate the phase-in period, and coordinate all activities with the incumbent Contractor while keeping the COTR and appropriate Sponsor management abreast of the transition. The transition period is defined as not to exceed ninety (90) calendar days. The Contractor shall develop an initial training schedule, in conjunction with the COTR, no later than fifteen (15) calendar days after start of the contract to ensure all new reviewers and all new technicians and specialists receive appropriate training in their assignments and the tools they will use to meet the requirements of the SOW in an expeditious manner.

The Contractor shall consider the following when establishing the transition approach:

All Key Personnel shall be available for work onsite at start of contract.

The Contractor shall recruit a workforce at the full-time equivalent levels specified by the Sponsor at contract award. The workforce shall meet the labor category and mandatory qualifications defined in Section 6. Copies of resumes shall be submitted to the Sponsor at least ten (10) calendar days prior to the <u>start of the individual</u> on the contract.

Note: For the purpose of the contract an FTE (for a non-key person) is 2,000 work-hours. Thus, for example, a requirement for 5 FTE in a labor category means the Sponsor requires 10,000 hours of labor in a given year irrespective of the number of full-time or part-time individuals required to meet the labor-hour requirement.

At least one-third (1/3) of the FTE in each labor/task category, except for Key Personnel, shall be fully cleared and available for work thirty (30) days after start of contract.

At least two-thirds (2/3) of the FTE in each labor/task category, except for Key Personnel, shall be fully cleared and available for work sixty (60) calendar days after start of contract.

The full FTE in each labor/task category, except for Key Personnel, shall be fully cleared and available for work ninety (90) calendar days after start of contract.

7.1 Kick-off Meeting

Within 15 days of contract award, the Contractor shall meet with the CO, COTR and Sponsor management to present the transition briefing (described in 7.0), discuss transition plans, review the terms and conditions of the contract, exchange information, determine points of contact, identify pertinent documentation and confirm schedule and deliverables. The COTR and the Contractor's Program Manager (PM) shall agree on a mutually acceptable format for monthly reports as defined in the SOW.

7.2 Transition Training

The Contractor shall provide declassification and subject matter experts from the reviewer cadre to assist the Sponsor in training of the reviewer workforce during the transition period. The Contractor shall also provide training for all new technicians and specialists by the end of the transition period.

7.2.1 Transition Training Tasks

The Contractor shall:

- Ensure the Contractor workforce attends all required mission-related training.
- Provide and present segments of the declassification review training.
- Provide training aids for the training segments they are called upon to support.
- Provide a reviewer training schedule for the transition period.

7.2.2 Transition Training Deliverables

All course, curriculum, and training aids shall be approved by the COTR and are considered deliverables for this contract and the property of the Sponsor. Training deliverables include:

- Attendance at all required mission-related training for all Contractor personnel.
- Training materials for those training segments provided by Contractor experts. These materials include, but are not limited to, class exercises, student handouts, slides, etc.
- A training schedule shall be provided to the Sponsor within fifteen (15) calendar days after the start of the contract. An updated training schedule shall be provided, respectively, forty-five (45) calendar days and seventy-five (75) calendar days after start of the contract.

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Section 8: Special Considerations

8.0   Special Considerations

This section covers Security, the Government-Furnished Working Environment, Software and Hardware Purchases, Uses of Data Provided under this Contract, Additional Surge Support, Training and Travel.

8.1   General Security Considerations

The Contractor shall comply with all personnel, physical and automated information system (AIS) security policies, practices and procedures of the Sponsor. Appropriate Sponsor approved clearances and Sponsor approved accreditations to store classified materials and process classified data shall be coordinated with the Contracting Officer's Security Representative (COSR) and be in place for this contract prior to initiating any classified effort in support of this contract.

The association of the Sponsor with the Contractor is UNCLASSIFIED. The classification levels of Sponsor deliverables, to include the SOW, the work to be performed, and reports from the Contractor, and/or any discussions between the Contractor and Sponsor, and hardware and deliverables shall be in accordance with the stipulated Contract Data Classification Guide (CDCG).

8.1.1   Personnel Clearance Requirements

All Contractor personnel performing tasks in support of this SOW except USAF Program personnel are required to have an Industrial Security Staff Approval/Top Secret (ISSA/TS) clearance. An ISSA/TS clearance is based upon a full Special Background Investigation (SBI) and a polygraph interview. USAF Program personnel are required to have a permanent DOD Top Secret clearance.

8.1.2   Contractor Security Plan (CSP)

The Contractor shall maintain an overall Security Program in accordance with the guidance of the appropriate SCI security control system manual. The Contractor shall submit and maintain a Contractor Security Plan (CSP) that covers all security activities, which shall be approved by the COSR. The Security Plan shall ensure that the security requirements are understood and fully incorporated into the contract management, analysis, business processes, movement of classified materials, and development, integration and test processes, as well as network operations and procedures.

8.1.2.1   Contractor Security Plan Deliverable

Within 60 calendar days of contract award, the Contractor shall submit to the Sponsor, for Sponsor approval, a Contractor Security Plan (CSP). This plan shall cover all aspects of Contractor security in execution of this SOW. The plan shall cover:

- Security Officer for this program;
- Security management structure and organization;
- Intended process for the security screening of individuals for clearances;
- Intended security training, education, and indoctrination programs;
- Security briefing/debriefing procedures, including maintaining a database record;
- Foreign contact and travel reporting procedures, as applicable;
- Security incident investigation procedures;
- Information Systems Security Officer and/or Staff;
- How the prime will manage security cognizance over the subcontractors (if applicable);
- Subcontractor security officers for this program (if applicable);
- Past experience writing DCID 6/3 (Protecting Sensitive Compartmented Information Within Information Systems)-compliant security plans, and processing plans through the Sponsor Certification and Accreditation Process;
- Process by which the Security Office will monitor and respond to changes in Sponsor security rules, regulations, and policy;
- Processes for the movement of classified materials.

8.1.3   Not used

8.2   Government-Furnished Working Environment

The Sponsor shall furnish property and services for onsite Contractor support for the term of the effort. These are as follows:

- Office space, desk, and office supplies as appropriate;
- Secure and non-secure telephone service, as appropriate;
- Storage for classified materials;
- A workstation, network infrastructure, and associated software to perform this effort.

8.3   Software and Hardware Purchases

The Sponsor may direct the Contractor in writing to purchase products as part of this effort. All related purchases shall be deemed as direct costs for use on this effort or delivery to the Sponsor. All software and hardware purchased under this contract will become property of the Sponsor. The Contractor shall be responsible for property accountability transfer to the Sponsor property custodian for all purchases.

With prior approval from the COTR, all products shall be purchased from funds set aside in an equipment pool valued not to exceed $75,000 per contract period. It is the Contractor's responsibility to keep track of all purchases made from the pool and, at no time, may the Contractor exceed the amount in the pool without prior authorization from the Contracting Officer.

8.4   Uses of Data Provided under this Contract

The Sponsor reserves the right to use any data provided either directly or indirectly (such as transactional or process measurement data from an automated system) under this contract for management and business process improvement. The CDC and IRR systems make extensive use of Sponsor-furnished information. All data stored in these systems are official Sponsor records. No Sponsor-furnished information goes off-site to a contractor facility without COTR approval. The Contractor may not use the materials developed or obtained during this effort for any other contract or purpose without the express written permission of the Sponsor.

8.5   Option for Additional Surge Support

The Sponsor may direct the Contractor in writing that a necessary surge support resource is needed. The Contractor should have a strategy to surge up to 100% during the entire contract period for additional non-key personnel FTEs, as needed (See SECTION B - SUPPLIES OR SERVICES AND PRICES/COSTS; B.3   152.216-754 Option For Increased Quantity - Direct Hours (Cost Reimbursement) (NOV 2005)).
The Sponsor will provide notification and information at the time of request. This surge support will allow the Sponsor to continue management and labor resources support to CIO/IMS in meeting its annual goals for information review and release and related programs.

8.6   Training

The Contractor shall provide any needed training, except as otherwise identified in the SOW, to personnel without direct cost to the Sponsor. The Contractor shall support the Sponsor in training personnel in all relevant business areas of the contract, as identified in TASK 1. However, any training that is mission-related may be approved by the

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COTR, on a case-by-case basis. Mission-related training may include, but is not limited to records management and declassification training; imaging/scanning training; industry and government conferences, symposium, workshops, etc.; and other training, as deemed appropriate by the COTR. Mission-related training will not cover any skills that are not unique to the Sponsor.

8.7   Travel

Travel will include areas outside the Washington, DC area but within United States, to locations and organizations involved with records declassification. All travel must have written COTR approval prior to the commencement of the trip.

Section 9: Additional Documentation

Appendix 1 - Executive Order 13292-Further Amendment to Executive Order 12958, as Amended   (referred to as EO 12958, as amended) (in Reading Room)

Appendix 2 - 32 CFR Parts 2001 and 2004 Classified National Security Information (Directive No. 1): Final Rule (referred to as the Implementing Directive) (in Reading Room)

Appendix 3 - CIA Declassification Plan 2006
The CIA 25-Year Declassification Plan as submitted to ISOO in April 2006 was publicly released in April 2007. Two Declassification Plan annexes (Annexes B-C) originally provided to ISOO have <u>not</u> been provided in the attached.   Annexes B and C are classified (providing classified names and budget figures, respectively). The plan provides an overview of the CIA 25-Year Declassification Program through FY 2005. Though some of the numbers and projections have changed, the Sponsor believes this plan provides useful context for the Offeror. Another major change to the 25-Year effort as described in the plan is that Information Management Services (IMS) (the parent organization to the CIA Declassification Center) has been moved from the Directorate of Support to report directly to the Agency Chief Information Officer (the IMS internal organization with respect to the SIRR effort remains unchanged). On 31 December 2006, CIA met the first deadline of the EO 12958, as amended. **(in Reading Room)**

Appendix 4 – Annual CIA FOIA Report 2007 (in Reading Room)

Appendix 5 – DCID 6-3, Protecting Sensitive Compartmented Information Within Information Systems (in Reading Room)

Appendix 6 – SIRR Systems (Attached)

Appendix 7 – Glossary of Terms (Attached)

Appendix 6 – SIRR Systems

The SIRR systems supported by the Information Technology Service Desk are listed below. All systems except CREST and the NARA LAN are hosted on the Agency's Secure Network (ASN). An unclassified CREST is located at NARA, with classified CREST systems located at Presidential Libraries. First line support to these systems is provided via telephone.

CADRE - The CIA Automated Declassification and Release Environment (CADRE) system supports the electronic review and redaction of documents; final quality review of documents to be released to the public; FOIA and MR case management; workflow; search and retrieval; and reports against the system's document and case repository. CADRE has been in use by CDC for the 25-year program since May 2006. Initial operating capability for CADRE case management (i.e., FOIA, MDR, historical review, etc.) is early 2008.

CREST -The CIA Records Search Tool (CREST), located at National Archives and Records Administration II facility in College Park, MD is a repository of declassified documents reviewed through CADRE. The system is a configuration of a COTS tool that provides index and text search and retrieval capabilities. Similar classified systems are located at the Presidential Libraries supported by the RAC Program.

DDR – Duplicate Document Resolution (DDR) is a system used to compare incoming documents with previously reviewed documents in the CADRE repository (including those reviewed in IWAS and MORI). The comparison is based on document metadata and image information. Duplicates of incoming documents identified by DDR and validated by human review are flagged, and this information is made available to CADRE reviewers for use in the declassification process.

ERWI - The Electronic Records Web Interface (ERWI) is a web based search engine based on the Convera Retrieval Ware product. ERWI provides for a consolidated search capability against documents stored in both the IWAS and MORI document repositories. ERWI will be shutdown after the conversion of case management from MORI to CADRE is complete (estimated as spring 2008).

IWAS -The Image Workflow Automated System (IWAS) system is one of the legacy document review systems being replaced by CADRE. The IWAS system and its' related support systems provides a repository of original, reviewed, releasable, and released documents. IWAS should be shutdown by early 2008.

MORI -The Management of Officially Released Information (MORI) system is one of the legacy document review systems being replaced by CADRE. MORI provides

capabilities to support scanning and indexing of hardcopy documents; electronic review and redaction of documents; case management; document repository; search and retrieval; and reports. MORI will be replaced by CADRE case management. Initial operating capability for CADRE case management (i.e., required to support FOIA, MDR, historical review, etc.) is early 2008.

NARA LAN -A Local Area Network (LAN) located at NARA II, College Park, MD supports manual review of 25 Year documents under the EO. The system consists of one Windows server and 10 windows client workstations.

SMART2 - The Space Management and Retirement Tracking 2 (SMART2) is an IMS web-based application used to manage the Agency's records that are held at the Agency Archives and Records Center (AARC). SMART2 provides the tracking information associated with the retirement, retrieval, and destruction of Agency records.

STAIRS -The State of the Art Interagency Referral System (STAIRS) system supports the electronic review and redaction of documents by OGAs.

TeamMetrix – TeamMetrix is a commercially available management account and time reporting system used by all CDC staff, the SIRR Contractor, and selected other contractors supporting CDC. The TeamMetrix system is available on the ASN and accessible on the desktop.

Appendix 7 – Glossary of Terms

AARC	Agency Archive and Records Center
ARP	Agency Release Panel
ASC	Agency Scanning Center
ASN	Agency Secure Network
ASO	Area Security Officer
BPI	Business Process Improvement
CADRE	CIA Automated Declassification and Release Environment
CDC	CIA Declassification Center
CDCG	Contract Data Classification Guide
CGM	Cognizant Government Manager
CIA	Central Intelligence Agency
CIO	Chief Information Officer
CO	Contracting Officer
COTR	Contracting Officer's Technical Representative
COTS	Commercial-Off-The-Shelf
CREST	CIA Records Search Tool
CSP	Contractor Security Plan
CWE	Common Workgroup Environment
DCIA	Director of Central Intelligence Agency
DCID	Director of Central Intelligence Directives
DDR	Duplicate Document Resolution
Dirty Word	Terms generally not found in released records
DNI	Director of National Intelligence
DOJ	Department of Justice
DR	Discrepancy Report
EO	Executive Order
ERWI	Electronic Records Web Interface
FAR	Federal Acquisition Regulation
FOIA	Freedom of Information Act
FRUS	Foreign Relations of the US
FY	Fiscal Year
G&A	General and Administrative

GFE	Government- Furnished Equipment
GFI	Government-Furnished Information
HCD	Historical Collection Division
IMO	Information Management Officer
IMS	Information Management Services
IRO	Information Review Officer
IRR	Information Review and Release
ISOO	Information Security Oversight Office
ISSA	Industrial Security Staff Approval/
IWAS	Image Workflow Automated System
LAN	Local Area Network
MAS	Management Accounting System
MR	Mandatory Declassification Review
MORI	Management of Officially Released Information
NARA	National Archive and Records Administration
NASA	National Aeronautical and Space Administration
O&M	Operations and Maintenance
OAR	Operational Acceptance Review
OBS	Organization Breakdown Structure
ODC	Other Direct Costs
OGA	Other Government Agency
PA	Privacy Act
PIC	Process Improvement Council
PIPD	Public Information Programs Division
PM	Program Manager
PMO	Program Management Office
QA	Quality Assurance
QRB	Quality Review Board
RAC	Remote Archive Capture
RFP	Request For Proposal
RFC	Request For Change
RMTG	Records Management and Technology Group
SBI	Security Background Investigation
SCI	Sensitive Compartmented Information

SIRR	Support to Information Review and Release
SMART2	The Space Management and Retirement Tracking 2 (SMART2)
SOW	Statement Of Work
STAIRS	State of the Art Interagency Referral System
TBD	To Be Determined
TS	Top Secret
USAF	United States Air Force
WBS	Work Breakdown Structure
WMA	Washington Metropolitan Area

Section 10: Attachments

Attachment A: SIRR Staffing Matrix

Attachment B: Not used

Attachment C: Not Used

Attachment D: Personnel Qualifications Matrix

Attachment E: Resume Template

Attachment F: Clearance Matrix

Attachment G: Not used

UNCLASSIFIED