

SOLICITATION/CONTRACT/ORDER FOR COMMERCIAL ITEMS				1. REQUISITION NUMBER 5002181292026	PAGE 1 OF 27
OFFEROR TO COMPLETE BLOCKS 12, 17, 23, 24, & 30				"UNCLASSIFIED"	
2. CONTRACT NO. 2023H2-25-A-00002	3. AWARD/EFFECTIVE DATE 09/24/2025	4. ORDER NUMBER 2023H2-25-F-00145	5. SOLICITATION NUMBER	6. SOLICITATION ISSUE DATE	
7. FOR SOLICITATION INFORMATION CALL:		a. NAME Alison Adamson	b. TELEPHONE NUMBER (No collect calls) (b)(6)		8. OFFER DUE DATE/ LOCAL TIME
9. ISSUED BY Office of Procurement Operations-Criminal Investigations 1160 W 1200 S Ogden, UT 84414 Attn: Alison M. Adamson Tel: (b)(6) Email: (b)(6)		CODE 2050	10. THIS ACQUISITION IS <input checked="" type="checkbox"/> UNRESTRICTED OR <input type="checkbox"/> SET ASIDE: % FOR:		
			<input type="checkbox"/> SMALL BUSINESS <input type="checkbox"/> WOMEN-OWNED SMALL BUSINESS (WOSB) ELIGIBLE UNDER THE WOMEN-OWNED SMALL BUSINESS PROGRAM NAICS: 513210 <input type="checkbox"/> HUBZONE SMALL BUSINESS <input type="checkbox"/> EDWOSB SIZE STANDARD: \$47.0 M <input type="checkbox"/> SERVICE-DISABLED VETERAN-OWNED SMALL BUSINESS <input type="checkbox"/> 8 (A)		
11. DELIVERY FOR FOB DESTINATION UNLESS BLOCK IS MARKED <input type="checkbox"/> SEE SCHEDULE	12. DISCOUNT TERMS		13a. THIS CONTRACT IS A RATED ORDER UNDER DPAS (15 CFR 700) <input type="checkbox"/>		13b. RATING
15. DELIVER TO See Attached Delivery Schedule		CODE	16. ADMINISTERED BY Office of Procurement Operations-Criminal Investigations 25520 Commercentre Drive Lake Forest, CA 92630 Attn: (b)(6) Tel: (b)(6) Email: (b)(6)		14. METHOD OF SOLICITATION <input type="checkbox"/> RFQ <input type="checkbox"/> IFB <input type="checkbox"/> RFP
17a. CONTRACTOR/OFFEROR PALANTIR TECHNOLOGIES INC. 1200 17th Street, Floor 15, Denver, CO 8020 TELEPHONE NO.	CODE	FACILITY CODE	18a. PAYMENT WILL BE MADE BY Invoices must be submitted via the Invoice Processing Platform at www.ipp.gov		
<input type="checkbox"/> 17b. CHECK IF REMITTANCE IS DIFFERENT AND PUT SUCH ADDRESS IN OFFER		<input type="checkbox"/> 18b. SUBMIT INVOICES TO ADDRESS SHOWN IN BLOCK 18a UNLESS BLOCK BELOW IS CHECKED <input type="checkbox"/> SEE ADDENDUM			
19. ITEM NO.	20. SCHEDULE OF SUPPLIES/SERVICES		21. QUANTITY	22. UNIT	23. UNIT PRICE
	See Attached Schedule(s)				
25. ACCOUNTING AND APPROPRIATION DATA See Attached Schedule(s)		26. TOTAL AWARD AMOUNT (For Govt. Use Only) \$6,594,996.00			
<input type="checkbox"/> 27a. SOLICITATION INCORPORATES BY REFERENCE FAR 52.212-1, 52.212-4. FAR 52.212-3 AND 52.212-5 ARE ATTACHED. ADDENDA <input type="checkbox"/> ARE <input type="checkbox"/> ARE NOT ATTACHED			<input type="checkbox"/> ARE <input type="checkbox"/> ARE NOT ATTACHED		
<input checked="" type="checkbox"/> 27b. CONTRACT/PURCHASE ORDER INCORPORATES BY REFERENCE FAR 52.212-4. FAR 52.212-5 IS ATTACHED. ADDENDA <input checked="" type="checkbox"/> ARE <input type="checkbox"/> ARE NOT ATTACHED			<input checked="" type="checkbox"/> ARE <input type="checkbox"/> ARE NOT ATTACHED		
28. CONTRACTOR IS REQUIRED TO SIGN THIS DOCUMENT AND RETURN COPIES TO ISSUING OFFICE. CONTRACTOR AGREES TO FURNISH AND DELIVER ALL ITEMS SET FORTH OR OTHERWISE IDENTIFIED ABOVE AND ON ANY ADDITIONAL SHEETS SUBJECT TO THE TERMS AND CONDITIONS SPECIFIED			29. AWARD OF CONTRACT: REF. 2023H2-25-Q-5000198117 OFFER DATED 09/10/2025. YOUR OFFER ON SOLICITATION (BLOCK 5), INCLUDING ANY ADDITIONS OR CHANGES WHICH ARE SET FORTH HEREIN, IS ACCEPTED AS TO ITEMS:		
30a. SIGNATURE OF OFFEROR/CONTRACTOR (b)(6)		31a. UNITED STATES OF AMERICA (SIGNATURE OF CONTRACTING OFFICER) Alison M. Adamson Digitally signed by Alison M. Adamson Date: 2025.09.24 20:47:04 -06'00'			
30b. NAME AND TITLE OF SIGNER (Type or print) (b)(6)	30c. DATE SIGNED September 24, 2025	31b. NAME OF CONTRACTING OFFICER (Type or print) Alison M. Adamson		31c. DATE SIGNED 9/24/2025	

19. ITEM NO.	20. 2026-08526 00000622847 SCHEDULE OF SUPPLIES/SERVICES "UNCLASSIFIED"	21. 5/28/2026 QUANTITY	22. UNIT	23. UNIT PRICE	24. AMOUNT

32a. QUANTITY IN COLUMN 21 HAS BEEN RECEIVED INSPECTED ACCEPTED, AND CONFORMS TO THE CONTRACT, EXCEPT AS NOTED: _____

32b. SIGNATURE OF AUTHORIZED GOVERNMENT REPRESENTATIVE	32c. DATE	32d. PRINTED NAME AND TITLE OF AUTHORIZED GOVERNMENT REPRESENTATIVE
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32e. MAILING ADDRESS OF AUTHORIZED GOVERNMENT REPRESENTATIVE	32f. TELEPHONE NUMBER OF AUTHORIZED GOVERNMENT REPRESENTATIVE 32g. E-MAIL OF AUTHORIZED GOVERNMENT REPRESENTATIVE
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33. SHIP NUMBER PARTIAL FINAL	34. VOUCHER NUMBER	35. AMOUNT VERIFIED CORRECT FOR	36. PAYMENT COMPLETE PARTIAL FINAL	37. CHECK NUMBER
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38. S/R ACCOUNT NO.	39. S/R VOUCHER NUMBER	40. PAID BY
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41a. I CERTIFY THIS ACCOUNT IS CORRECT AND PROPER FOR PAYMENT	42a. RECEIVED BY (Print)
41b. SIGNATURE AND TITLE OF CERTIFYING OFFICER	41c. DATE 42b. RECEIVED AT (Location)
	42c. DATE REC'D (YY/MM/DD) 42d. TOTAL CONTAINERS

Internal Revenue Service

**Office of the Chief Procurement Officer (OCPO) Special Operations Division, Criminal
Investigations Branch, Section 3**

Lead Case Analysis (LCA)

Blanket Purchase Agreement (BPA) Number: 2023H2-25-A-00001

Procurement BPA Order Number: 2032H2-25-F-00145

Table of Contents

SF1449

Section I – Line-Item Table

Section II – Performance Work Statement (PWS)

Section III – Clauses

Section I –Line-Item Table

Line Item Table

Item No.	Item Description	QTY	Unit	Unit Price	Total Value
0001	Palantir Term Software License configure Palantir Term Software License configured for Procurement Hub	(b)(4)			
0002	Core Engineering Services (CES) Core Engineering Services (CES)				

Accounting and Appropriation Data

ACCT. Line No.	Accounting and Appropriation Data	Amount
0001-0001	(b)(4)	
0002-0001		

Note: In the event the Government requires continued performance, prices for the 12-month base period of performance will be used for the extension of services, FAR 52.217-8, Option to Extend Services.

Section II – Performance Work Statement

Procurement Hub

1.1 Introduction

The IRS seeks to modernize reporting, traceability, and alignment of data to IRS goals and objectives. The purpose of this Performance Work Statement (PWS) is to establish the requirements for the acquisition of Palantir software solutions and services to support data integration, analytics, and decision-making across enterprise operations. The contractor shall provide licensing, configuration, integration, training, and support for the Palantir platform to enhance operational efficiency, compliance, and mission execution.

To improve the use of AI and advance the mission to innovate and remove barriers, the Office of the Chief Procurement Officer (OCPO) seeks to modernize the federal acquisition utilizing AI. The IRS seeks to modernize its acquisition lifecycle by leveraging an advanced AI Solution. This solution will enhance efficiency, accuracy, regulation, policy, and procedures compliance across key acquisition functions. The objective is to utilize AI capabilities such as, but not limited to, machine learning, natural language processing, and robotics- process automation, and predictive analytics – to analyze procurement data, automate processes, and provide actionable insights that drive informed decision-making.

The AI Solution must support federal procurement professionals and program owners by surfacing Procurement System of Record data to facilitate responding to procurement questions/data calls, completing analysis, automating Procurement workflows, visualizing Procurement information, and ensuring alignment with internal policies and procedures, cybersecurity standards, Federal Information Security Management Act (FISMA), Section 508 accessibility guidelines, federal regulations, and other IRS specific language is incorporated into procurement packages, as applicable.

1.2 Background

The Digital Accountability and Transparency Act (DATA Act) mandates "consistent" and "reliable" contract spending data. The OPEN Government Data aims to convert government data assets (e.g. contract documents) to machine readable formats to the maximum extent practicable. High quality, machine-readable data will fuel the vision in the Promoting Rigorous and Innovative Cost Efficiencies for Federal Procurement and Acquisitions Act (PRICE Act) of 2021 for "modernized data analytics, and advanced technologies that allow decision making to occur in a more friction-free buying environment".

The IRS currently uses and interfaces with more than 10 business systems and procurement data sources and creates/maintains numerous spreadsheets to identify, track, manage, and report against IRS Procurements. These systems have been built over decades, leveraging different technologies and data sources while supporting business processes. This fragmented landscape can lead to a number of undesirable outcomes including but not limited to duplication of effort and cost, poor understanding of gaps in the coverage, and suboptimal procurement transparency.

2.0 OBJECTIVES

The objective of the Procurement Management Palantir project is to reduce overall IRS operating costs and streamline systems and services needed to conduct IRS revenue collection and taxpayer services. To do this, IRS must understand the state of the world of their contracts, identify priority contracts for actions, and streamline IRS procurement operations. The contractor will enable these objectives by:

- Continually ingest and surface procurement data from multiple procurement systems of record integrating data and sustaining data connections required to create Contract 360 view that surfaces key information about contracts, vehicles and vendors.
- Maintain and refine current procurement workflows and determine the viability of transitioning existing procurement workflows from disparate systems to a modern consolidated platform
- Determine the changes required to IRS business processes to transition existing procurement review/approval methods to a modern platform.
- Understand the long-term cost implications of running these methods on a commercial-cloud-based platform.
- Reconciling related data elements of structured, unstructured, and semi-structured formats to enhance source-of-truth information about the contracting landscape
- Enabling operational decisions and actions to be made regarding IRS contracts, vehicles and market research and track those actions in platform.
- Integrating with open-source databases and existing procurement systems at IRS and enabling writeback to those systems where necessary
- Enabling access for IRS procurement and other Treasury users as mutually agreed upon
- (Optional) Implementing mutually agreed upon procurement workload management workflows to assess contracting officer workload, reallocate work, and understand state of active procurement operations and real-time progress and bottlenecks, and take related actions in platform, ensuring writeback to required systems where needed

3.0 SCOPE

The Contractor shall assist the Government in implementing an AI-driven Procurement Hub that integrates with existing and incoming government Procurement Systems of Record and data sources and enhances procurement knowledge sharing, compliance monitoring, risk assessment, analysis, and decision support throughout the acquisition lifecycle. The solution must be scalable, user-friendly, and capable of supporting acquisition professionals throughout the entire procurement lifecycle.

The Procurement Hub shall incorporate AI capabilities that are currently available in the marketplace including, but not limited to, large language models, machine learning, deep learning, robotics process/intelligent automation/bots, agentic AI and natural language processing (NLP). The Procurement Hub shall consider risks related to external exposure to sensitive or proprietary procurement information and data. The Contractor shall provide AI Use Cases inclusive of implementation plans in compliance with IRS Certificate to Operate (CTO) requirements. The implementation plans shall include prioritization criteria that balance factors related to ease of implementation with impact on the Procurement organization and include performance metrics by which the benefits can be measured. The AI Solution shall meet all relevant Federal Acquisition Regulation (FAR), cybersecurity (e.g., FedRAMP), and IRS-specific requirements. The AI

Solution shall comply with AI Governance, innovation, and risk management guidance set forth in OMB M-24-10.

Requirements:

- Software licensing - Provide term licenses for Palantir Foundry based on various use cases. Ensure cloud deployment options comply with agency/bureau IT policies, procedures, and protocols based on various use cases. Ensure cloud deployment options comply with agency/bureau IT policies, procedures, and protocols
- System Integration - Integrate Palantir solutions with existing government data sources and IT systems, upon mutual consent of the contractor and the customer. Ensure compliance with federal cybersecurity requirements, including FedRAMP and FISMA. Configure and deploy data integrations and create application programming interfaces (APIs) for data ingestion and system interoperability
- Data Analytics and AI Capabilities - Enable AI/ML-based data analysis, anomaly detection, and predictive analytics for the above-referenced objectives. Ensure data fusion capabilities to correlate information across multiple domains.
- Compliance and Security - Ensure all software solutions comply with federal cybersecurity standards. Implement secure data governance policies and granular access controls. Provide audit and logging capabilities to maintain accountability and compliance.

- Design, maintain and optimize current Contract 360 procurement workflows and function coding on Palantir SNAP to allow OCPO stakeholders the ability to assign, review, route, track, and edit actions within the Procurement Hub:
 - o Active Contract Review / Approval workflow
 - o Termination Reversal workflow
 - o Contract Decision Change Request workflow

- Provide support to design and configure mutually agreed upon new or existing Contract 360 workflows and visualizations on the Palantir Platform as OCPO's needs are identified.

- Maintain and optimize current procurement data feeds to the Palantir Platform, including, but not limited to:
 - o Integrated Financial System-Procurement for Public sector (IFS-PPS) System of Record or future IRS Procurement System of Record
 - o Federal Procurement Data System (FPDS)
 - o USA Spending (USASpending.gov)

- Provide support to ingest mutually agreed upon new data sources and elements into the Palantir Platform. The contractor shall partner with IRS or other designated vendors in the testing and deployment of these integrations.:
Options include but are not limited to PRISM, other Contract Writing System and Financial System Data, Treasury Requirements Approval & Coordination System (TRACS), Treasury Dynamic Forecast, IT Contract Tool (ITCT), GSA Data to Decisions Government-Wide Category Management Reports (<https://d2d.gsa.gov/report/government-wide-category-management-reports>) and government-wide civilian agency data from the Acquisition.gov Service Contract Inventory (<https://www.acquisition.gov/content/service-contract-inventory>).

- Provide support to develop mutually agreed new or deploy existing visualizations on Palantir Platform as OCPO's needs are identified.

- Integrate available data elements, agency- and bureau- specific data sources into the platform to provide a holistic approach to managing, tracking, reporting, and tracing data back to various elements to inform the decision-making process.
- Provide connections to internal bureau systems via RESTful APIs, JDBC connections, file system connections, directory connections, vendor plugins, custom plugin development, and other platform integration mechanisms. The contractor shall partner with IRS or other designated vendors in the testing and deployment of these integrations. Requires connecting various data sources and elements within the agency/bureau for decision making. The contractor will make available all data elements in the system via RESTful APIs.
- Provide necessary administrative support by maintaining code repositories, troubleshooting platform errors, and cataloging changes made to data pipelines, workflows, etc.
- Continually provide training and analysis assistance for Palantir Platform capabilities on an as-needed, mutually agreed upon cadence:
 - Options include but are not limited to use cases for Quiver, Contour, Workshop, and other platform applications.

3.1 Sustainment and expansion of current Contract 360 use cases:

The contractor shall sustain connections to FPDS, USA Spending and IRS IFS and PPS to support contract 360 workflows and enable workflows such as:

- Performing structured, keyword and AI/LLM supported queries across all available IRS contract document content alongside CLIN, mod and contract metadata from multiple data sources
- Translating complex queries into live reporting, allowing leadership to stay up to date on overall status, workflow progress, and key alerts
- Row and column-level permissions ensure users only have access to data based on their role, while providing 360 views showing all relevant information in one place across all relevant data sources
- Support existing contract assessment and review workflows alongside contract 360 views

The contractor shall extend current use cases by integrating procurement-related data

- Establish live connections to mutually agreed procurement-related systems, such as Oracle Financial, PRISM and TRACS
- Establish data feeds or upload processes for capturing associated files for contracts, such as PDFs of award
- Extraction and transformation of these data feeds for incorporation into the core Contract 360 workflow (complex querying, monitoring, analysis, live reporting, 360 views)

3.2 Procurement Workload Operations (Optional)

Optional Surge support will be invoked at the Government's discretion through a written bilateral modification issued by the Contracting Officer and agreed upon by both Parties. Based on mutually agreed upon priorities and scope, The contractor shall implement procurement workload operations use cases by enabling IRS to see status of current contracts, stages of procurement, workload allocation by contracting officer, and contract load by IRS program office. This will enable the IRS to proactively manage CO workload, reassign contracts, see state of active procurement operations and take actions to reassign and reallocate workloads where needed.

- The contractor shall integrate shopping carts, TRACS data, contracting officer workload data, and other data as required to enable this workflow.
- The contractor shall configure workflows to see state of procurement operations, assignee, business owner/program office, and deadlines with automated notifications or as otherwise mutually agreed upon.
- The contractor shall configure actions to reassign the workload, change state and update underlying systems with writeback where required and as mutually agreed upon.
- The contractor shall implement alerting in platform to enable proactive procurement operations (e.g. upcoming contract expirations, shopping carts stuck in a state for a certain amount of time, overdue approvals, etc.)
- The contractor shall provide training, user support and workflow configuration for COs and CORs and other procurement officials.
-

4.0 TASKS

The Contractor shall coordinate with the Business stakeholders to understand user needs and business requirements for a Procurement Hub capable of automating Procurement review/approval processes and providing procurement transparency to the IRS.

Representative activities may include:

- The Contractor shall facilitate elaboration sessions, the elaboration of Business processes, and the identification of Business Rules.
- The Contractor shall work with IRS business and technical staff to define workflows, Process Optimization, Wireframes (as applicable), Journey Maps of Data Needs, Personas, Scenarios/Use Cases, and Acceptance Criteria
- The Contractor shall deploy an integrated interface (e.g., agile development pipeline and change control log) that reflects the business requirements and data needs.

Desired Outcomes:

- Continual scope and business requirements for requested changes, approved by the business.
- Delivery of a functional Procurement Hub in SNAP

Measures:

- A continually optimized Procurement Hub is with agile development pipeline and change control log.

4.1 Incorporation of various procurement and financial datasets into the Procurement Hub through external and internal data sources through Structured Query Language (SQL) tables and connections.

The Contractor shall set up necessary data connections from various procurement and financial data sources and coordinate with stakeholders to identify the required data fields to display in the Procurement Hub. The contractor will extract, connect and transform raw source data into useable fields for stakeholder analysis and reporting through data pipeline tables and queries. The contractor shall coordinate with OCPO stakeholders to understand user needs and business requirements for incorporation into the Procurement Hub.

4.2 Design and implement workflows and platform function coding to allow OCPO stakeholders the ability to assign, review, route, track, and edit actions within the platform.

The contractor will assist OCPO in establishing Procurement Hub workflows. Workflows may include, but are not limited to, contract assessment assignments, requests for contract disposition adjustments, contract termination rescissions, and the tracking of requisitions through the acquisition lifecycle. The contractor will ensure workflows execute all necessary steps for review/approvals and will deploy notifications accordingly to appropriate contracting points of contact for action. Contractor will provide administrative support to maintain code repositories for workflows and configure platform capabilities for OCPO to modify, track, and report outcomes from workflows.

4.3 Provide necessary administrative support by maintaining code repositories, troubleshooting platform errors, and cataloging changes made to data pipelines, workflows, etc.

The contractor will provide administrative support to OCPO stakeholders on system enhancements, workflow function changes, workflow action requests, permissions management, and be available to troubleshoot and walk personnel through technical issues within the Procurement Hub. Contractor will maintain a log of all production workflow customizations and changes requested and approved for deployment to the platform. Any production workflow customizations and changes must follow the established procedure for approval prior to deployment into the platform. This change log will contain detailed information on the change description, the impact on users, the date it was approved, and the name of the approver..

4.4 Continued training and analysis assistance across Procurement Hub capabilities

Contractor will provide learning opportunities to procurement personnel on capabilities within the platform. Contractor will assist stakeholders in developing and formatting required analysis paths into executive level dashboards.

4.5 Project Management Support

The Contractor shall appoint a project manager who has the responsibility for all deliverables and services provided under this contract and full management authority for all Contractor personnel assigned to work on this project. The Contractor's project manager shall serve as the primary point of contact for the Government's Contracting Officer Representative (COR) in matters concerning this Award and will interact with other Government employees as appropriate. Resources will be onboarded in a manner that will provide on-time support.

The Contractor shall provide the deliverables as described in the table below in collaboration with Government Project Management and Business stakeholders. All potentially duplicate reporting needs will be avoided wherever possible, ensuring efficiency in Project Management tracking and reporting for all involved. Each Task Order will identify the specific deliverables required for that Task Order and the final format and content requirements will be mutually developed and agreed upon among the IRS Program Manager (PM), the contractor and the contracting officer's technical representative (COR).

Representative activities may include:

- The Contractor shall oversee project management to ensure smooth delivery within the agreed-to timelines.
- The Contractor shall develop a Quality Control Plan (QCP). The QCP will set forth the staffing and procedures for self-inspecting the quality, timeliness, responsiveness, customer satisfaction, and other performance requirements in the PWS.

Deliverables:

Program management support is responsive, timely and of benefit in identifying and resolving issues and risks.

Deliverable & Reference	Content / Purpose	Format	Due / Frequency
Software Licenses	Provision of Palantir Software licenses		5 days ARO
Technical Support Services	Ongoing technical support and troubleshooting		Throughout period of performance
Risk Register	Risk Register and Issues Log	Word PDF or XLS PDF	
Risk Management Plan (RMP) § 4.5	Risk Management Plan	Word PDF or XLS PDF	Monthly (5BD after month-end)
Integrated Master Schedule (IMS) § 4.5	All tasks, dependencies, critical path, baseline vs. actual	MS Project (MPP) or XML	Monthly (5BD after month-end)
Quality Control Plan (QCP) § 4.5	Staffing, inspection methods, metrics map, corrective-action flow	Word/PDF	30 CD ARO; revisions within 5 BD of Gov't comments
Data-Integration Technical Package § 4.1	ETL/ELT scripts, SQL view definitions, data-source inventory, security controls	Exportable open formats and descriptions. Exportable open formats and descriptions	60 CD ARO for first 5 data sources; thereafter per approved change request
Monthly Data-Quality Report § 4.1 & 5.0	Error rate, latency, data-profile metrics, how often used, how many uses.	XLS/PDF	Monthly (5 BD after month-end)

MVP Workflow Release § 4.2	Contract review, termination reversal, decision-change workflows deployed to SNAP	Deployment package + release notes	120 CD ARO
Workflow Performance Report § 4.2	Cycle-time statistics, success/failure counts, user feedback	PDF + CSV extract	Quarterly
Change / Configuration Log § 4.3	Change log with detailed information on the change description, the impact on users, the date it was approved, and the name of the approver for updates to production workflows	Word or Excel	Weekly (by COB Friday)
Tier-2 Trouble Ticket Summary § 4.3	Ticket count, mean-time-to-resolve (MTTR), backlog status	PDF	Monthly
Training Plan & Materials § 4.4	Course outline, objectives, schedule, 508-compliant slide deck/job aids	PDF + MP4 recordings	30 CD ARO; 15 CD before subsequent changes
AI Use-Case Implementation Plan § 3.0	Prioritized backlog, impact/effort matrix, KPI forecast, FedRAMP & Publication 4812 artifacts list	Word/PDF	45 CD ARO; refresh semi-annually
System Security Plan (SSP) Update & ATO Package § 3.0	FedRAMP Moderate controls, control implementation summary, POA&M	Word + XLS	Draft 60 CD ARO; Final 20 BD after IRS CISO comments
Monthly Performance Review (MPR) Deck § 4.5	KPI dashboard, schedule & cost variance, risk log, lessons learned	PPT/PDF	Monthly (within 5 BD after month-end)
Quarterly Executive Brief (QEB) § 4.5	Trend analysis, strategic risks, projected savings, roadmap	PPT	Quarterly
Authority-to-Operate (ATO) Support Artifacts § 3.0	Updated control evidence, penetration-test results, ISSO review memo	ZIP bundle	As scheduled by IRS CISO (anticipated annually)

Final Transition Plan & Knowledge-Transfer Package	Asset inventory, admin credentials hand-off, archival procedures, user manuals	Word/PDF + CSV + MP4	30 CD before contract end
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5.0 PERIOD OF PERFORMANCE and METRICS

The task order performance period is 12 months from the date of the award.

KPI	Target	Monitoring Method
Workflow cycle time	≤15 min median	Platform audit logs, reported in MPR

The Contractor shall be available to proactively receive, respond, and remediate issues per the maximum response times (during normal business hours ET):

- Critical (Priority 1) – 60 minutes
- High (Priority 2) – 4 hours
- Standard (Priority 3) – 1 Business Day
- Low or Planned (Priority 4) – 5 Business Days
- Maximum response times do not account for reasonable delay factors approved by the CO with input from the PM and COR, such as but not limited to:
 - Timely responses from users to assist in troubleshooting questions.
 - Time needed to develop, test, and deploy updates, patches, etc., as authorized by the CO with input from the COR and PM. Other approved delays as authorized by the CO with input from the COR and Project Managers
 - Application User Group Page

6.0 PLACE OF PERFORMANCE/ACCESS TO GOVERNMENT FACILITIES

The Contractor shall generally work remotely, though the Contractor will have the option to work at IRS locations if requested to facilitate faster delivery. The nature of this work may require effort outside the normal workday to minimize the impact of application changes upon the user community. Contract employees shall be provided with secure remote access to the IRS network via whatever technology is approved for that purpose (currently Enterprise Remote Access Project (ERAP)). These employees will also be granted occasional, “as-needed” access to an IRS facility

near their location to obtain services only available in IRS offices (e.g., computer hardware repair or replacement).

- **(Provide 5%) Government's site:** The primary site of performance is the New Carrollton Federal Building 5000 Ellis Road, Lanham, MD and the IRS main facility at 1111 Constitution Avenue, Washington, DC.
- The Contractor is allowed limited access to the IRS Government facilities, as specified below:
 - IRS New Carrollton Office (NCFB)
5000 Ellin Road, Lanham MD 20706

IRS Main Building
1111 Constitution Avenue, NW, Washington DC 20224

7.0 INSPECTION AND ACCEPTANCE

7.1 Inspection

The inspection will be at the same place as performance and delivery, unless otherwise specified. Submission of all deliverables should be sent to the COR, Program Manager, Team Leads.

7.2 General Acceptance Criteria

The general quality measures as set forth below will be applied to each work product received from the Contractor under this task order.

- Accuracy - work products shall be accurate in presentation, technical content, and adherence to accepted elements of style.
- Clarity - work products shall be clear and concise; engineering terms shall be used, as appropriate. All diagrams shall be easy to understand and relevant to the supporting narrative.
- Specifications Validity - All work products shall satisfy the requirements of the Government as specified herein.
- Format - work products shall be submitted in hard copy (where applicable) and in media defined in the PWS. The work product format is defined in this PWS. Hard copy formats shall follow Department of the Treasury and IRS Directives and shall be consistent with other similar efforts. All text and diagrammatic files shall be editable by the Government.
- Timeliness - work products shall be submitted on or before the due date specified in this Task Order, or submitted IAW later, scheduled date determined by the CO.

7.3 Documentation Quality

The Contractor shall provide all information in accordance with the required IRS standards and guidelines as stated in the PWS.

All Deliverables, Documents, and Services shall satisfy program and project requirements, and comply with IRS CMMI standards, existing IRS standards and guidelines, and integrate with IRS, security requirements and Section 508.

- Completeness – The document demonstrates sufficient level of detail to show understanding of the requirements, technology and design, customers and operating environment.

- Feasibility - The document defines information, which is formatted properly, contains valid information in support of this task order and provides a deliverable within time constraints.
- Understandability - The document is to be clean, clearly written and legible (all printed words). The outline is to be easy to follow. All diagrams are to be easy to understand and relevant to the supporting narrative.
- Accuracy – The document is accurate in presentation, exhibiting clear and concise information, technical content, adherence to accepted elements of style, operational content and consistent within itself and with other documents.
- Practicality - The document provides information and guidance that is practical for implementation within the IRS environment and appropriate given the subject organization's level of maturity.
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8.0 SURVEILLANCE

The surveillance process will be included in the Quality Assurance Surveillance Plan (QASP). The Contractor shall establish and maintain a complete Quality Control Plan (QCP) IAW the QASP. This links the Government and Contractor's quality assurance efforts into an integrated package with shared objectives.

The contractor shall deliver a QCP briefing during the orientation briefing to explain how the quality of the Contractor is implemented in addition to delivering a written QCP to the Program Manager, Team Leads, and COR within 14 (fourteen) business days after award.

9.0 PERFORMANCE REQUIREMENTS, STANDARDS AND SURVEILLANCE

The Government believes there is value in incorporating Performance-Based Service Acquisition (PBSA) methodology with an outcomes-based focus for this work. The Quality Assurance Surveillance Plan (QASP) defines the Governments Desired Outcomes, Required Services, Performance Standards, Acceptable Quality Levels and Monitoring Methods for each Task included in this Contract.

9.1 Performance Requirements

Performance requirements shall be identified in the Quality Assurance Surveillance Plan (QASP).

9.2 Performance Standards

The Government is incorporating the PBSA methodology with an outcome-based focus for this work. The QASP defines the Government's desired outcomes, required services, performance standards, acceptable quality levels and monitoring methods for each Task included in this contract.

9.3 Skill Requirement

The Contractor shall demonstrate their experience and expertise in supporting large Federal data integrations and clear interfaces. The Contractor shall provide technical expertise supporting the objectives described in this PWS. This expertise could include:

- Experience in Palantir systems
- Experience with Agile project delivery

- Experience with user interface development
- Experience with IRS data ecosystem and integrations
- Experience with IRS security and accessibility requirements

10.0 GOVERNMENT FURNISHED PROPERTY (GFP) AND INFORMATION (GFI)

10.1 Government furnished property (to include material, equipment, and/or information) shall be provided during performance. The IRS will provide the following property to all contractors as needed:

ITEMS
GFE, laptop
PIV Card

10.2 Government furnished information (to include manuals, notes, memos, instruction materials, and other information) shall be provided during the performance of this agreement. The IRS will provide the following information:

ITEMS	QUANTITY
Palantir operating process and procedures	

Access to standards and guidelines and any other documentation that is required for the satisfactory performance of this requirement will be made available to the Contractor no later than five (5) business days after request.

The issuance, handling, and disposition of GFP shall be conducted IAW FAR 52.245-1, Government Property, Alternate I, 52.245-9, Use and Charges and the requirements set forth in Section 11, Security Requirements. All GFP/GFI shall be returned to the Government upon contract completion, as appropriate.

11. Security

All contractor staff proposed for work under this task order must undergo successful background investigations that correspond with tasks performed. The TSO Organization will partner with and rely on the IRS Cyber-Security Office to provide guidance and ensure compliance with all IRS security requirements and considerations including contractor access to IRS systems, data and secure facilities.

11.1 Personnel Security

All Contractor personnel must have a background investigation. Specific security requirements, including the level of background investigation, will be identified at the task order level by the IRS. The IRS will process the initiation of investigations in a timely manner to avoid unnecessary delays to contractor performance. The Contractor shall ensure personnel provide all required information promptly to support this process.

If required by the IRS for designated positions, contractor personnel will comply with pre-onboarding drug-screening requirements consistent with IRS policy. The IRS will confirm which positions, if any, are subject to such requirements.

11.2 Physical Security

The contractor shall:

- Comply with all pertinent facility regulations and procedures for Federal agencies, unless the Government grants a waiver,
- Make recommendations for improving protection for contractor staff if there is a security issue,
- Promptly report unlawful acts committed on or against property under the charge and control of their contract. All such reports should be submitted through the COR to Treasury's Chief Information Security Officer or designee, and
- Provide planning and training to contractor and sub-contractor personnel on matters relating to protection and emergency response if funded by the Government.

11.3 Desktop Security

The contractor shall screen all electronic deliverables or electronically provided information for malicious code using Treasury approved anti-virus software prior to delivery to the government. The contractor shall utilize appropriate controls (firewalls, password protection, encryption, digital certificates, etc.) at all times to protect contract related information processed, stored or transmitted on the contractor's and government's computers/servers to ensure confidentiality, integrity, availability, authentication and non-repudiation. This includes ensuring that provisions are in place that will safeguard all aspects of information operations pertaining to this contract in compliance with all applicable PWS references.

The contractor shall be responsible for policy, practice, and compliance by its personnel, subcontractors, and representatives regarding the storage and removal of electronic and printed materials considered sensitive in nature (i.e., system password and user identification access codes) from printers, desktops, laptops, furniture, presentation equipment, and any other form of information housing. This is so that the information is not accessible by unauthorized personnel and so that disposal follows Treasury information security practices. The contractor must ensure that the contractor, sub-contractor, or business partner personnel protect all sensitive and secure documents to the extent possible from either inadvertent or deliberate compromise.

11.4 Solution Information/Data/Content Security and Protection

The contractor shall support the compliance and promotion of policy, guidance, and practices for the protection of those cyber systems, databases, and/or web sites to ensure system content, data, and information repositories developed and maintained. This protection shall include inadvertent events/acts, overt internal and external acts, system failure, cyber-attacks, or acts of nature.

Contracting Officer: Allison Adamson

(b)(6)

IR1052.239.9002 Section 508 Services

For Development or Customization: All contracts, solicitations, purchase orders, delivery orders and interagency agreements that contain a requirement of services which will result in the delivery of a new or updated information and communication technology (ICT) item/product must conform to the applicable provisions of the appropriate technical standards in 36 CFR, Appendix C to Part 1194, and functional performance criteria in 36 CFR Chapter 3, unless an agency exception to this requirement exists at E202 General Exceptions.

IR1052.239-9001 Section 508 Conformance

When Less than Fully Conforming: Each information and communication technology (ICT) product and/or product related service delivered under the terms of this contract, at a minimum, shall conform to the applicable accessibility standards at 36 CFR, Appendix C to Part 1194 at the level of conformance as specified in the Attachment entitled (Please state where attachment may be found and name of attachment for example, Section J., Voluntary Product Accessibility Template (VPAT) or Section J., Evaluation Matrix).

IR1052.239-9003 Section 508 Accessibility of

Information and Communication Technology (100% Compliance)

When Fully Conforming: Each information and communication technology (ICT) product or service furnished under this contract shall comply with the Information and Communication Technology Accessibility Standards (36 CFR, Appendix C to Part 1194). If the Contracting Officer determines any furnished products or services are not in compliance with the contract, the Contracting Officer will apply the remedies described under FAR 52.246-2, Inspection of Supplies – Fixed Price or FAR 52.246-4, Inspection of Services – Fixed Price.

The following technical standards have been determined to be applicable to this contract (Reference - ICT Accessibility 508 Standards):

Chapter 5: Software

502 Interoperability with Assistive Technology

502.1 General

502.2 Documented Accessibility Features

502.2.1 User Control of Accessibility Features

502.2.2 No Disruption of Accessibility Features

502.3 Accessibility Services

502.3.1 Object Information

502.3.2 Modification of Object Information

502.3.3 Row, Column, and Headers

502.3.4 Values

502.3.5 Modification of Values

502.3.6 Label Relationships

502.3.7 Hierarchical Relationships

502.3.8 Text

502.3.9 Modification of Text

- 502.3.10 List of Actions
- 502.3.11 Actions on Objects
- 502.3.12 Focus Cursor
- 502.3.13 Modification of Focus Cursor
- 502.3.14 Event Notification
- 502.4 Platform Accessibility Features

503 Applications

- 503.1 General
- 503.2 User Preferences
- 503.3 Alternative User Interfaces
- 503.4 User Controls for Captions and Audio Description
 - 503.4.1 Caption Controls
 - 503.4.2 Audio Description Controls

504 Authoring Tools

- 504.1 General
- 504.2 Content Creation or Editing
 - 504.2.1 Preservation of Information Provided for Accessibility in Format Conversion
 - 504.2.2 PDF Export
- 504.3 Prompts
- 504.4 Templates

Chapter 7: Referenced Standards

702.10.1 WCAG 2.0

- 1.1.1 Non-text Content
- 1.2.1 Audio-only and Video-only (Pre-recorded)
- 1.2.2 Captions (Pre-recorded)
- 1.2.3 Audio Description or Media Alternative (Prerecorded)
- 1.2.4 Captions (Live)
- 1.2.5 Audio Description (Pre-recorded)
- 1.3.1 Info and Relationships
- 1.3.2 Meaningful Sequence
- 1.3.3 Sensory Characteristics
- 1.4.1 Use of Color
- 1.4.2 Audio Control
- 1.4.3 Contrast (Minimum)
- 1.4.4 Resize Text
- 1.4.5 Images of Text
- 2.1.1 Keyboard
- 2.1.2 No Keyboard Trap
- 2.2.1 Timing Adjustable
- 2.2.2 Pause, Stop, Hide
- 2.3.1 Three Flashes or Below

- 2.4.1 Bypass Blocks
- 2.4.2 Page Titled
- 2.4.3 Focus Order
- 2.4.4 Link Purpose (in Context)
- 2.4.5 Multiple Ways
- 2.4.6 Headings and Labels
- 2.4.7 Focus Visible
- 3.1.1 Language of Page
- 3.1.2 Language of Parts
- 3.2.1 On Focus
- 3.2.2 On Input
- 3.2.3 Consistent Navigation
- 3.2.4 Consistent Identification
- 3.3.1 Error Identification
- 3.3.2 Labels or Instructions
- 3.3.3 Error Suggestion
- 3.3.4 Error Prevention (Legal, Financial, Data)
- 4.1.1 Parsing
- 4.1.2 Name, Role, Value

The standards do not require the installation of specific accessibility-related software or the attachment of an assistive technology device, but merely require that the ICT be compatible with such software and devices so that it can be made accessible if so required by the agency in the future.

Chapter 3: Functional Performance Criteria

The following functional performance criteria (36 CFR Chapter 3) apply to this contract.

- 302.1 Without Vision
- 302.2 With Limited Vision
- 302.3 Without Perception of Color
- 302.4 Without Hearing
- 302.5 Without Limited Hearing
- 302.6 Without Speech
- 302.7 With Limited Manipulation
- 302.8 With Limited Reach and Strength
- 302.9 With Limited Language, Cognitive, and Learning Abilities

IR1052.239-9000 Section 508 Information,

Documentation and Support

In accordance with 36 CFR, Appendix C to Part 1194, the information and communication technology (ICT) products and product support services documentation furnished in performance of this contract shall be provided at no additional cost. The contractor shall provide information, documentation, and support relative to the supplies and services described in the statement of work, performance work statement or statement of objectives (select one). The following technical standards and provisions have been determined to be applicable to this contract:

Chapter 6: Support Documentation and Services

Support Documentation

602.2 Accessibility and Compatibility Features

602.3 Electronic Support Documentation

602.4 Alternate Formats for Non-Electronic Support
Documentation

Support Services

603.2 Information on Accessibility and Compatibility
Features

603.3 Accommodation of Communication Needs

Section III – Clauses

GSA terms and conditions, as well as BPA terms and clauses, flow down to this Order. In the event of a conflict between the terms and conditions of these documents, the IRS and the contractor will adhere to the following order of precedence, GSA contract, BPA, Task Order.

52.217-8 Option to Extend Services (Nov 1999)

The Government may require continued performance of any services within the limits and at the rates specified in the contract. These rates may be adjusted only as a result of revisions to prevailing labor rates provided by the Secretary of Labor. The option provision may be exercised more than once, but the total extension of performance hereunder shall not exceed 6 months. The Contracting Officer may exercise the option by written notice to the Contractor within 60 days.

(End of Clause)

1052.201-70 Contracting Officer's Representative (COR) Appointment and Authority (APR 2015)

(a) The COR is (b)(6)

(b) Performance of work under this contract is subject to the technical direction of the COR identified above, or a representative designated in writing. The term "technical direction" includes, without limitation, direction to the contractor that directs or redirects the labor effort, shifts the work between work areas or locations, and/or fills in details and otherwise serves to ensure that tasks outlined in the work statement are accomplished satisfactorily.

(c) Technical direction must be within the scope of the contract specification(s)/work statement. The COR does not have authority to issue technical direction that:

- (1) Constitutes a change of assignment or additional work outside the contract specification(s)/work statement;
- (2) Constitutes a change as defined in the clause entitled "Changes";
- (3) In any manner causes an increase or decrease in the contract price, or the time required for contract performance;
- (4) Changes any of the terms, conditions, or specification(s)/work statement of the contract;
- (5) Interferes with the contractor's right to perform under the terms and conditions of the contract; or
- (6) Directs, supervises or otherwise controls the actions of the Contractor's employees.

(d) Technical direction may be oral or in writing. The COR must confirm oral direction in writing within five workdays, with a copy to the Contracting Officer.

(e) The Contractor shall proceed promptly with performance resulting from the technical direction issued by the COR. If, in the opinion of the Contractor, any direction of the COR or the designated representative falls within the limitations of (c) above, the Contractor shall immediately notify the Contracting Officer no later than the beginning of the next Government workday.

(f) Failure of the Contractor and the Contracting Officer to agree that technical direction is within the scope of the contract shall be subject to the terms of the clause entitled "Disputes."

(End of clause)

Electronic Invoicing and Payment Requirements for the Invoice Processing Platform (IPP) (JUL 2019)

(a) Definitions:

"Short payment" as used in this clause means the partial payment of an invoice for goods/services rendered at the time of payment when the invoice includes additional goods/services that have not yet been provided/rendered.

“Short payment” example: The contract requires the delivery of a set number of items, with the price, delivery location, and delivery due date also specified. The vendor delivers 50% of the items as specified but invoices for 100% of the items. Before implementation of the IPP, the IRS would have paid the vendor for the items delivered and instructed the vendor to re-invoice the IRS when the balances of the items were delivered. In other words, the IRS would "short pay" the invoice since the IRS did not remit payment for the full invoice amount. With implementation of the IPP, the IRS can no longer do this because the IRS cannot accept an electronic invoice that includes items not yet received. The IRS will reject the invoice. The vendor needs to submit an invoice for only the items received by the IRS (in this case, 50%), and, if these items meet all other contract terms and conditions, the IRS will pay the invoiced amount. The vendor submits subsequent invoice(s) for items as they are delivered and accepted.

(b) The Invoice Processing Platform (IPP) is a secure Web-based electronic invoicing and payment information service available to all Federal agencies and their suppliers. Effective October 1, 2012, invoicing for payment through the IPP will be mandatory for all new contract awards. Additional information regarding the IPP may be found at the IPP website address <https://www.ipp.gov>. Contractors must complete the contractor point of contact information below and submit it with their proposal submissions. Contractors may contact the IPP Helpdesk for assistance via e-mail at ippgroup@stls.frb.org or via phone at (866) 973-3131. Once a contract award has been made, the contractor will be contacted by the IPP via e-mail to set-up an account. It will be necessary for contractors to login to their IPP accounts every 90 days to keep their IPP accounts active.

(c) Contractor Point of Contact Information

Contractor Name: Palantir Technologies, Inc.

Contractor IPP Point of Contact Name: (b)(6)

Contractor Phone Number: (b)(6)

Contractor E-mail Address: (b)(6)

(d) Electronic Invoicing and Payment Requirements

Vendor invoices submitted electronically through the IPP should be in the proper format and contain the information required for payment processing. To be approved for payment, a “proper invoice” must list the items specified in FAR 52.232-25 (a)(3)(i) through (a)(3)(x), or in the case of a Commercial Item Contract, the items included in 52.212-4(g)(1)(i) through (g)(1)(x).

If the vendor is offering a discount via the IPP, the discount must be reflected on the invoice. The vendor will select 'Create Invoice'. The IPP system will default to ‘Net 30 Prompt Pay’ under the Payment Terms dropdown box. The vendor will select from 54 different discount options for the invoice that is being created. If the vendor chooses to offer a discount on the invoice screen, the information will interface to the payment system for processing. Discounts that are offered on attachments rather than the invoice itself cannot be accepted.

Under this contract, the following documents are required to be submitted as an attachment to the invoice (Contracting Officer fills in additional documentation that must be furnished by the contractor (e.g., timesheet)). **Please do not submit into IPP any documentation/attachments**

that conflict with what is stated on the invoice:

Payment and Invoice Questions

For payment and invoice questions, contact the Ancillary Systems at (304) 254-3372 or via e- mail at cfo.fm.ipp.customer.support@irs.gov.

(e) Waiver

If the Contractor is unable to use the IPP for submitting payment requests starting on October 1, 2012, then a waiver form must be completed and submitted with the contractor’s proposal submission for review and approval by the Contracting Officer based on one of the conditions listed in the waiver. The vendor will be notified prior to award as to whether their request for waiver has been approved or denied. If the waiver is granted, then a copy of the waiver must be submitted with each paper invoice that the vendor submits to the payment office, or the invoice will be returned.

(f) Short Payment

Short payment on vendor submitted invoices will no longer be processed or paid. If any portion of the invoice does not meet the requirements for a proper invoice, the entire invoice shall be rejected and returned to the vendor unpaid.

IRS Invoice Processing Platform (IPP) Waiver Form

The IRS invoicing and payment requirements clause (IR1052.232-9000) requires that all invoices under awards made (or effective) on or after October 1, 2012, be submitted electronically via the IPP unless a waiver is requested and granted. If the Contractor is unable to submit its invoice through the IPP, the Contractor shall complete this waiver form indicating the reason for the waiver request by selecting the appropriate box below and providing a narrative summarizing in detail the circumstances requiring a waiver.

For a solicitation, submit the waiver form with the proposal submission. For a modification that incorporates the IPP clause into an existing contract, submit the waiver form with the modification. The CO will notify the vendor via e-mail or another appropriate means of communication prior to award as to whether their waiver has been approved or denied. If the waiver is granted, then a copy of the approved waiver must be submitted with each invoice that the vendor submits to the payment office, or the invoice will be returned.

Reason for requesting a waiver of the requirement to submit an electronic invoice via the IPP:

- 1. Submission of invoices through IPP would impose a hardship on an individual (includes employees and sole proprietors) due to either a physical or mental disability; a geographic, language, or literacy barrier; or an undue financial burden. The requirement to submit invoices through the IPP is automatically waived for all individuals who do not have payment capability using ACH with a U.S. financial institution.
- 2. The political, financial or communications infrastructure where the place of business is located does not support access to the IPP for submitting invoices electronically.
- 3. The contractor is located within an area designated by the President of the United States or an authorized agency administration as a disaster area. (Please identify area/location.)
- 4. The submission of invoices electronically may pose a threat to national security, the life or physical safety of an individual may be endangered, or a law

enforcement action may be compromised.

- 5. The agency does not expect to receive more than one invoice from the same contractor within a one-year period. i.e., the invoice submission is non- recurring.
- 6. The contractor customarily submits a high volume of invoices on a regular basis via file format, not currently supported by the IPP (i.e., uses a file format other than XML or CSV) and the high volume of invoices would cause a significant burden to the contractor if submitted through the IPP individually. If utilizing this exception, please identify the file formats supported by your invoicing system so that the IPP may consider implementing the requested file format at a later date. File format(s) used:
- 7. Other - Please explain:

Attach a separate sheet of paper with a summary narrative substantiating the circumstances for the waiver exception selected from above (1 through 7).

Waiver Submitted By:

Contractor Name

Name of Person Submitting Request for Waiver

Title Signature of Person Submitting Request for Waiver

E-mail Address

Phone No.

Contract/Order No.

Date Submitted

Waiver Approved By:

Contracting Officer's Name Printed

Contracting Officer's Signature

Date

SOLICITATION/CONTRACT/ORDER FOR COMMERCIAL ITEMS
OFFEROR TO COMPLETE BLOCKS 12, 17, 23, 24, & 30

2. CONTRACT NO. 2023H2-25-A-00002	3. AWARD/EFFECTIVE DATE 09/24/2025	4. ORDER NUMBER 2023H2-25-F-00144	5. SOLICITATION NUMBER 2023H2-25-Q-5000198117	6. SOLICITATION ISSUE DATE
--------------------------------------	---------------------------------------	--------------------------------------	--	----------------------------

7. FOR SOLICITATION INFORMATION CALL:	a. NAME Alison Adamson	b. TELEPHONE NUMBER (No collect calls) (b)(6)	8. OFFER DUE DATE/ LOCAL TIME
---------------------------------------	---------------------------	--	-------------------------------

9. ISSUED BY Office of Procurement Operations-Criminal Investigations 1160 W 1200 S Ogden, UT 84414 Attn: Alison M. Adamson Tel: (b)(6) Email: (b)(6)	CODE 2050	10. THIS ACQUISITION IS <input checked="" type="checkbox"/> UNRESTRICTED OR <input type="checkbox"/> SET ASIDE: % FOR: <input type="checkbox"/> SMALL BUSINESS <input type="checkbox"/> HUBZONE SMALL BUSINESS <input type="checkbox"/> SERVICE-DISABLED VETERAN-OWNED SMALL BUSINESS <input type="checkbox"/> WOMEN-OWNED SMALL BUSINESS (WOSB) ELIGIBLE UNDER THE WOMEN-OWNED SMALL BUSINESS PROGRAM NAICS: 513210 <input type="checkbox"/> EDWOSB <input type="checkbox"/> 8 (A) SIZE STANDARD: \$47.0 M
--	--------------	---

11. DELIVERY FOR FOB DESTINATION UNLESS BLOCK IS MARKED <input type="checkbox"/> SEE SCHEDULE	12. DISCOUNT TERMS	13a. THIS CONTRACT IS A RATED ORDER UNDER DPAS (15 CFR 700) <input type="checkbox"/>	13b. RATING	14. METHOD OF SOLICITATION <input type="checkbox"/> RFQ <input type="checkbox"/> IFB <input type="checkbox"/> RFP
--	--------------------	---	-------------	--

15. DELIVER TO See Attached Delivery Schedule	CODE	16. ADMINISTERED BY Office of Procurement Operations-Criminal Investigations 25520 Commercentre Drive Lake Forest, CA 92630 Attn: (b)(6) Tel: (b)(6) Email: (b)(6)	CODE
--	------	---	------

17a. CONTRACTOR/OFFEROR PALANTIR TECHNOLOGIES INC. 1200 17th Street, Floor 15, Denver, CO 80202 TELEPHONE NO.	CODE	FACILITY CODE	18a. PAYMENT WILL BE MADE BY Invoices must be submitted via the Invoice Processing Platform at www.ipp.gov	CODE
--	------	---------------	---	------

17b. CHECK IF REMITTANCE IS DIFFERENT AND PUT SUCH ADDRESS IN OFFER

18b. SUBMIT INVOICES TO ADDRESS SHOWN IN BLOCK 18a UNLESS BLOCK BELOW IS CHECKED SEE ADDENDUM

19. ITEM NO.	20. SCHEDULE OF SUPPLIES/SERVICES	21. QUANTITY	22. UNIT	23. UNIT PRICE	24. AMOUNT
	See Attached Schedule(s) <i>(Use Reverse and/or Attach Additional Sheets as Necessary)</i>				

25. ACCOUNTING AND APPROPRIATION DATA See Attached Schedule(s)	26. TOTAL AWARD AMOUNT (For Govt. Use Only) \$6,594,996.00
---	---

27a. SOLICITATION INCORPORATES BY REFERENCE FAR 52.212-1, 52.212-4. FAR 52.212-3 AND 52.212-5 ARE ATTACHED. ADDENDA ARE ARE NOT ATTACHED

27b. CONTRACT/PURCHASE ORDER INCORPORATES BY REFERENCE FAR 52.212-4. FAR 52.212-5 IS ATTACHED. ADDENDA ARE ARE NOT ATTACHED

28. CONTRACTOR IS REQUIRED TO SIGN THIS DOCUMENT AND RETURN COPIES TO ISSUING OFFICE. CONTRACTOR AGREES TO FURNISH AND DELIVER ALL ITEMS SET FORTH OR OTHERWISE IDENTIFIED ABOVE AND ON ANY ADDITIONAL SHEETS SUBJECT TO THE TERMS AND CONDITIONS SPECIFIED	29. AWARD OF CONTRACT: REF. 2023H2-25-Q-5000198117 OFFER DATED 09/10/2025. YOUR OFFER ON SOLICITATION (BLOCK 5), INCLUDING ANY ADDITIONS OR CHANGES WHICH ARE SET FORTH HEREIN, IS ACCEPTED AS TO ITEMS:
---	--

30a. SIGNATURE OF OFFEROR/CONTRACTOR (b)(6)	31a. UNITED STATES OF AMERICA (SIGNATURE OF CONTRACTING OFFICER) Alison M. Adamson Digitally signed by Alison M. Adamson Date: 2025.09.24 20:44:09 -06'00'
--	---

30b. NAME AND TITLE OF SIGNER (Type or print) (b)(6)	30c. DATE SIGNED September 24, 2025	31b. NAME OF CONTRACTING OFFICER (Type or print) Alison M. Adamson	31c. DATE SIGNED 9/24/2025
---	--	---	-------------------------------

19. ITEM NO.	2026-08526 200000622845 SCHEDULE OF SUPPLIES/SERVICES "UNCLASSIFIED"	21. 5/28/2026 QUANTITY	22. UNIT	23. UNIT PRICE	24. AMOUNT

32a. QUANTITY IN COLUMN 21 HAS BEEN RECEIVED INSPECTED ACCEPTED, AND CONFORMS TO THE CONTRACT, EXCEPT AS NOTED: _____

32b. SIGNATURE OF AUTHORIZED GOVERNMENT REPRESENTATIVE	32c. DATE	32d. PRINTED NAME AND TITLE OF AUTHORIZED GOVERNMENT REPRESENTATIVE
--	-----------	---

32e. MAILING ADDRESS OF AUTHORIZED GOVERNMENT REPRESENTATIVE	32f. TELEPHONE NUMBER OF AUTHORIZED GOVERNMENT REPRESENTATIVE
	32g. E-MAIL OF AUTHORIZED GOVERNMENT REPRESENTATIVE

33. SHIP NUMBER PARTIAL FINAL	34. VOUCHER NUMBER	35. AMOUNT VERIFIED CORRECT FOR	36. PAYMENT COMPLETE PARTIAL FINAL	37. CHECK NUMBER
--------------------------------------	--------------------	---------------------------------	---	------------------

38. S/R ACCOUNT NO.	39. S/R VOUCHER NUMBER	40. PAID BY
---------------------	------------------------	-------------

41a. I CERTIFY THIS ACCOUNT IS CORRECT AND PROPER FOR PAYMENT	42a. RECEIVED BY (Print)
41b. SIGNATURE AND TITLE OF CERTIFYING OFFICER	41c. DATE
	42b. RECEIVED AT (Location)
	42c. DATE REC'D (YY/MM/DD)
	42d. TOTAL CONTAINERS

Internal Revenue Service

**Office of the Chief Procurement Officer (OCPO) Special Operations Division, Criminal
Investigations Branch, Section 3**

Lead Case Analysis (LCA)

Blanket Purchase Agreement (BPA) Number: 2023H2-25-A-00002

Criminal Investigations Case Management BPA Order Number: 2023H2-25-F-00144

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SF1449

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Section I –Line-Item Table

Line Item Table

Item No.	Item Description	QTY	Unit	Unit Price	Total Value
0001	Palantir IT Support (CM Platform) Palantir Platform Term Software Licenses (PT-PG-TERM) Palantir Term Software License configured for ICM (b)(4)	(b)(4)			
0001A	Palantir Non-IT Support (CM Platform) Palantir Platform Term Software Licenses (PT-PG-TERM) Palantir Term Software License configured for ICM (b)(4)				
0002	Palantir IT Suppt Director of Eng. (DES) Palantir Enablement Services (b)(4)				
0002A	Add'l funding CLIN 0002 Palantir Enablement Services Director of Engineering Services (DES) (b)(4)				

Note: In the event the Government requires continued performance, prices for the 12-month base period of performance will be used for the extension of services, FAR 52.217-8, Option to Extend Services.

Accounting and Appropriation Data

ACCT. Line No.	Accounting and Appropriation Data	Amount
0001-0001	(b)(4)	
0001A-0001		
0002-0001		
0002A-0001		

Section II – Performance Work Statement



Performance Work Statement

CI Case Management (CM)

September 2025

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SECTION A. DESCRIPTION / SPECIFICATIONS / WORK STATEMENT

A.1 INTRODUCTION AND BACKGROUND

The Internal Revenue Service Criminal Investigation (IRS-CI) has a requirement for designing and deploying a new cloud-based Case Management system to collect and analyze data, catalog issues and potential solutions to accomplish its mission. CI legacy case management systems mostly comprise of documents in generic OTS software resulting in significant redundancy and overlap in the data; and the maintenance on multiple legacy systems with numerous languages, and different structures is costly.

The purpose of this acquisition is to create a new CI Case Management (CM) System capable of supporting issue-resolution for IRS-CI. The new Case Management solution will give every authorized IRS-CI employee the ability to see the entire range of issues and communications with an entity, quickly resolve concerns cost effectively, and give visibility to responsible managers. This comprehensive strategy will enhance taxpayer service, modernize business processes, and improve the efficiency of IRS-CI operations.

The new Case Management system is envisioned to comprise data-driven, role-based applications services, and integrations that allows for the facilitated sharing of case data and the disposition of cases across multiple user communities and organizational functions. Case Management will define the direction of case management across the service and consolidate Business and IT processes related to case management. CM will identify common case management capabilities across the system and create a target solution based on common services and reusability. The Business and IT organizations will jointly develop and implement the solution using Agile methodology that includes IT development, Business configuration, and targeted retirement to reduce the Operations and Maintenance (O&M) footprint. As the new CM system matures, legacy systems supporting individual organization's case management will be retired.

Case Management (CM) will build upon the established CI capabilities provided by Lead and Case Analytics (LCA) and expand to provide a modernized case selection management system. This will allow CI to consolidate and decommission four outdated legacy systems: CI Management Information Systems (CIMIS), Asset Forfeiture Tracking and Retrieval (AFTRAK) System, Diary (Timekeeping), and TIMS (Total Inventory Management System) to improve efficiency and take advantage of new innovative capabilities (analytics, AI, etc.)

IRS-CI is seeking Contractor support to provide skilled labor and subject matter expertise to transfer the functionality and data of the IRS-CI legacy case management systems and implement the CM solution across the IRS environment.

Goal 1—Case Development and Investigation

- Objective: Provide modern tools(s) to support IRS-CI priorities and mission by enhancing IRS-CI processes for investigations including but not limited to complex criminal financial crimes, organized crime, tax crimes, protecting the US financial system and other US Treasury Department missions.

- Objective: Advance data access, usability, and analytics to inform decision making and improve operational outcomes.
- Objective: Drive increased agility, efficiency, effectiveness, and security in IRS-CI operations.

Goal 2—Modernize Data and Technology

- Objective: Integrate ever evolving and employee focused technologies that drive a more agile, efficient, mobile, and impactful financial investigative capability.
- Support a training space that solely uses sanitized and desensitized data without requiring access to real case data.
- Objective: Modernize information systems to improve service and enforcement

Goal 3--Communications

- Objective: Ensure the security of IRS-CI information systems.
- Objective: Modernize business processes and align the infrastructure support to maximize resources devoted to front-line IRS-CI investigative operations.

The Internal Revenue Service (IRS), Criminal Investigation (CI) is the law enforcement arm of the IRS. CI is charged with the enforcement of the federal income tax statutes. CI's top priority is the investigation of violations of the federal income tax law. Additionally, CI special agents lend their financial investigative expertise to money laundering and narcotics investigations and others conducted in conjunction with other law enforcement agencies at the local, state, and federal levels.

CI currently uses a 20-year-old investigation information system and seeks to implement Investigative Technology to migrate CI to a new CI Case Management (CM) platform.

CI does not have a centralized law enforcement case management system that allows for deconfliction (increased intelligence and officer safety), lead tracking, centralized evidence/case file management, chain of custody tracking, or investigative file sharing/comprehensive case file access (across CI, Chief Counsel, Department of Justice, and civil counterparts). Nor does CI have a centralized repository for all CI case data (intelligence and data analytics). CI's current solution for managing case data is having case related evidence, memorandums, and investigative approval requests housed in Windows folders maintained on individual agent's computers, shared Windows folders within field offices that periodically backup to regional servers and locking filing cabinets and grand jury storage rooms that house physical evidence.

This Task Order will enhance CI's current Investigative process throughout its lifecycle. A comprehensive new case management cloud-based system will enable IRS-CI to streamline the investigative process and decommission existing outdated, inefficient investigative technology.

A.2 TASK ORDER OBJECTIVES

This Performance Work Statement (PWS) is a Firm Fixed Price (FFP) /acquisition with mission-oriented, event driven performance measures and incentives.

The purpose of this PWS is to analyze the current case management requirements within IRS-CI, their business objectives, applicable scope, and constraints; and solicit an experienced industry partner that

will implement and provide a comprehensive disciplined approach to implementing those individual case management functionalities and data into a single IRS-CI Case Management system. This PWS provides the maximum flexibility for each Offeror to propose innovative solutions using proven processes, methods, standards, and technologies. Offerors shall ensure that all aspects of the PWS are addressed in their proposals as proposed FFP deliverables.

A.3 SCOPE OF WORK AND DESCRIPTION OF TASKS

The scope of work for this acquisition includes all efforts to install a comprehensive system to subsume the functionality of numerous individual organization's legacy case/file/evidence management systems to achieve the efficiencies and cost-effectiveness inherent in a standard system universally available to all authorized IRS employees. The work will include:

- (1) Collaborating with legacy system owners, IRS-CI agents and investigators, IRS-CI Information Security Subject Matter Experts, and IRS-CI Technical Operation personnel to determine short- and long-term future requirements.
- (2) Analyzing legacy systems CM and investigative content and functionalities, and processes.
- (3) Developing solutions to transition required functionalities and data into a modern system and centralized data store to support analytics, data sharing as permissible, and a new CM for investigative CM.
- (4) Structured User Acceptance Testing (UAT) for validating CM requirements are satisfied.
- (5) Assessment, analysis and projected level of effort to integrate functional services of existing IRS-CI file and evidence storage systems to a new system architecture.
- (6) Develop Application Programming Interfaces to facilitate integration with other systems as required.

The application shall be configurable to complex case management workflows, with a granular permissions framework to enable actions and completion of forms and be used as a document repository. Case management workflows may include escalating leads to create cases, scheme specific case workflows, asset/seizure tracking, equipment tracking, and personnel management. Robust reporting capabilities must be configurable and templated for recurring outbound reports.

IRS Criminal Investigations (CI) is seeking to replace and consolidate multiple systems that are currently used in CI to manage investigations, personnel, equipment, evidence, timekeeping, and seized assets. These are the existing systems whose functions should be consolidated into a single new CI Case Management (CM) system that is centralized and efficient:

- CIMIS: IRM-mandated information system for IRS CI
 - CIMIS has five main subject areas:
 1. Investigations
 - Manages and tracks the entire lifecycle of CI investigations
 2. Personnel
 - Employees and non-employees and their related data are tracked in CIMIS
 - Personnel are not necessarily CIMIS users, i.e. they may not be able to login
 3. Equipment

- Only investigative equipment is managed, i.e. badges and cars but not laptops or phones
- 4. Form 5043 (Timekeeping)
 - Timekeeping in CIMIS ingests data from the Diary application but also allows for reviews, additions, and edits to time records in the system
- 5. Admin Tools
 - Allows administrators to define organizations, roles, reference values, and manage CIMIS users
- AFTRAK: IRS CI Asset Seizure and Forfeiture Tracking System
- TIMS: IRS CI digital storage for investigative and administrative documents related to an investigation
- Diary: IRS CI standalone Time-Entry System that feeds Form 5043 data and government owned vehicle (GOV) usage data into CIMIS

Due to the number and different complexities of the legacy case management systems, the testing and proofing of individual system functionalities as they are incorporated into the CM system, and the broad application of the CM system across IRS-CI, the scope of work for this requirement consists of the task listed below:

TASK ORDER STRUCTURE

This Case Management Solution Integration Services (CM) Task Order Performance Work Statement (PWS) is structured with primary Sub-Tasks organized by the functional areas above with individual Contract Line-Item Numbers (CLINs) for each functional area. CM is a performance-based acquisition with mission-oriented, event-driven performance measures and incentives, and is expected to be performed on a primarily Firm Fixed Price (FFP) basis.

The work in each functional area will be governed by the Contractors' detailed post-award Project Plan in concurrence with the IRS-CI designated COR.

The activities and responsibilities of the Contractor include those identified in the following subtasks.

A.3.1 TASK 1- PROGRAM MANAGEMENT SUPPORT

The Contractor shall provide program management expertise in support of governance; executive meetings and reporting; development of strategic roadmaps, program planning, and project schedule management; requirements identification and risk management; stakeholder management and communications; document-management; results and performance management reporting; and cybersecurity analysis. Cybersecurity responsibilities will encompass providing support to IRS-CI's CISO/ISSO/ISSM for maintaining confidentiality, integrity, and availability of the program's information assets.

Specifically, the Contractor shall be capable of providing the following support services:

Governance

- Develop governance plans and models specific to this program with IRS-CI.

- Determine the optimal approach for aligning the new CM program with IRS Governance plans and models, in coordination with the new CM System Owner (SO).
- Prepare decision documents and maintaining decision tracking.
- Support Governance Board and Enterprise Steering Committee (ESC) coordination activities for the Delivery Partners.
- Prepare necessary materials for governance forums.

Executive Meetings and Reporting

- Assist in the preparation for standing and ad hoc executive meetings with both internal and external stakeholders, including developing meeting and presentation materials, as mutually agreed upon.
- Facilitate meetings, as required.

Strategic Planning (including Program Planning and Schedule Management)

- Provide strategy, planning, and integration support, including updating overall strategy documents and adjusting for changes in internal direction and priorities.
- Facilitate working sessions with IRS-CI CM and Cyber and Forensics Services teams and IRS-CI IT to review strategic planning documents and supporting artifacts, and to confirm alignment with IRS-CI strategic objectives, CM program objectives and legal mandates.
- Support delivery partner's activities, including coordinating reviews of documentation (e.g., program management plans, organizational readiness plans), documenting the results, assessing status of activities, and tracking actions.
- Review project charter and recommending adjustments to current project scopes or establishment of new projects, providing supporting presentations, and tracking actions.
- Facilitate reviews of IRS-CI Program Operating Model/Program Lifecycle to align the model to the current state of IRS-CI organizational structure, program management functions, and communication framework, analyzing Program Operating Models in similarly sized Federal programs and providing recommendations to enhance IRS-CI Program Operating Model/Program Lifecycle.
- Develop a Program Management Plan, in accordance with the IRS-CI Enterprise Lifecycle, and creating or updating the Program Contingency Plan for each release, including checking, as a minimum, consistency across projects for testing and deployment, resource requirements and schedules.

Requirements Identification and Risk Management

- Elicit program requirements and facilitating build-to requirements with IT delivery partners for CM releases.
- Document requirements and ensuring alignment in Contractor tools.
- Implement a mature risk and issue management approach, aligned with CM's Risk Management and Implementation Plan, to accommodate the high visibility of CM among IRS-CI and external stakeholders, issues that are inherently Government actions in the project's critical path,

including proactive identification and management of risks and issues, and development of risk mitigation strategies.

- Develop contingency plans for risks that have a high probability of becoming issues.
- Provide direction to the program team on the risk and issue management process, including providing technical expertise to facilitate and manage risks and issues.
- Schedule and facilitating meetings with risk stakeholders (e.g. application developers, business owners, and management) and assisting delivery partners in resolving any of the issues per risk management practices.

Stakeholder Communications

- Create transparency and promote collaboration with internal and external IT stakeholders by communicating the goals, objectives, and timelines of the program.
- Develop and execute a stakeholder interaction model to facilitate engagement between the IRS-CI PMO, and IRS-CI Business units and IT Delivery Partners.
- Design agenda/content development and facilitation/logistical support of current and future requirements gathering sessions and other similar events.

Quality Reviews and Audits

- Work with IRS-CI-PMO in performing quality reviews and provide editor support for critical program implementation, release overview and integration documents.
- Participate in/Conduct quality audits documenting methods in which a process, artifact/work product, or configuration is objectively evaluated to determine compliance with project specified standards, guidelines, and/or procedures. The following three types of process audits may be conducted:
 - Surveillance Audits
 - Program-level evaluation of a set of processes or activities identified by IT PMO leadership.
 - In-depth Audits
 - Comprehensive program-level evaluation of a single process and associated work products triggered by health assessment results, risk profile, strategic needs, or executive direction.
 - Includes Artifact and Work Product Audits to check for conformance to templates, content requirements, and other standards (including grammar and spelling)
 - Delta Audits
 - Formal check to ensure non-compliances from previous audit(s) have been addressed.
- Scope of audits includes Requirements management, Scheduling/WBS, Performance Management (monitoring and control), Configuration/Change Management, Quality Management (including document review), Contract Management, and Risk Management, Testing, and Cybersecurity. Additional processes may be added or removed at the discretion of PMO leadership with concurrence by the Contractor.

Performance Management

- Maintain a program reporting structure that aligns with Project Management Plan documents including maintaining and updating reporting measures, standards, and key process indicators, report design, and similar key performance activities.
 - Develop plans that provide a structured approach for managing and measuring the achievement of program results and benefits, including identifying the data required to measure and monitor results and benefits, along with the processes and tools that will be used to collect the data.
 - Review, revise, and update as necessary for each system release.
 - Work with the IRS-CI PMO and delivery partners to update and maintain the processes, templates, and tools for reporting the status of each project and summary views for the overall Program.
 - Ensure compliance and security of the solution environment.

Cybersecurity Analysis

- Understand the programs and organization's strategic cybersecurity needs to establish context for all program's cybersecurity activities and planning efficient implementation and operation in the context of the CM Plan; this effort includes facilitating cybersecurity-related discussions with Delivery Partners to convey governing security policies.
- Develop and implementing risk mitigation strategies, including. developing realistic threat and risk models.
- Develop necessary artifacts for the Security Accreditation & Authorization (SA&A) process as defined in the Security Target and System Security Plan (SSP) to assist IRS-CI in support of the program receiving an Authority to Operate (ATO).
- Diagnose and resolve security related findings or issues; and advise on managing security weaknesses, vulnerabilities, or defects, corroborating the advice with the analysis of the results of the Contractor's security scanning tools in the Contractors continuous integration/continuous delivery (CI/CD) DevOps pipeline.
- Advise on cloud cybersecurity architectures and management.
- Analyze the proposed solution's security capabilities, suggesting and developing ways of strengthening these capabilities, and supporting secure integration of the proposed solution components.

DESIRED OUTCOME: The CM Program is effectively and efficiently managed as it moves toward successfully achieving its goals. Cybersecurity efforts result in program components leading to a secure Case Management System. All documentation activities for CM system are completed in accordance with approved processes.

A.3.2 TASK 2- AGILE PORTFOLIO MANAGEMENT SUPPORT

The Contractor shall perform all work within the Agile development framework established and managed by the IRS-CI team. The Contractor will fully integrate into the IRS-CI Agile processes, adhere to team-defined workflows, and be accountable for completing all tasks assigned within each sprint cycle to support the incremental development of a system of systems and/or the new CM capability.

Specifically, the Contractor shall provide the following support services:

Agile Process Integration and Management

- Align all work with IRS-CI-defined Agile milestones and ensure that multi-threaded releases are properly planned and executed in accordance with project schedules, scope, dependencies, and risk management protocols.
- Ensure all release deliverables and artifacts meet milestone exit criteria as defined by the IRS-CI team.
- Identify and manage technical dependencies throughout the development lifecycle.
- Offer recommendations on tailoring Agile methodologies to best support program objectives, while aligning with IRS-CI standards.
- Develop and maintain required documentation in accordance with IRS-CI guidelines.

DESIRED OUTCOME: Successful delivery of the CM program through a collaborative partnership between the Contractor, Contracting, and IRS-CI teams. The Contractor and IRS-CI Agile team will work together in close coordination, ensuring alignment with Agile processes and sprint objectives while leveraging the strengths and expertise of all parties to achieve project goals.

A.3.3 TASK 3- DEVELOPMENT, MODERNIZATION AND ENHANCEMENT (DME) SUPPORT

The Contractor shall provide release management support to manage, plan, schedule, and control iterations of the system of systems and CM solution through the stages of the lifecycle, culminating in deployment.

Specifically, the Contractor shall provide the following support services:

Release Management

- Determine the as-is state of the IRS-CI Business in relation to the adoption of the COTS solution for CM replacing the current IRS-CI legacy processes, including identifying and defining roles and responsibilities based on IRS-CI Business and IT rules, with associated permissions.
- Develop the to-be process view, analyzing gaps between the as-is and to-be processes under the selected solution, and developing a transition plan to move from existing individual business case management processes and systems to the new CM system.
- Identify areas for IRS-CI business process improvement and reengineering which will alter the data set and impact data migration.
- Develop, review, revise, and update the IRS-CI CM Release Plan, including developing a consistent approach to monitor change requests within an IRS-CI CM project/release.
- Evaluate change requests in terms of scope, cost and schedule and making recommendations to the IRS-CI CM Program Office
- Project/release level- Develop documentation that clearly defines the scope of each project/release, project milestones, milestone exit criteria, and acceptance criteria for CM projects/releases; this support includes collecting the required data, facilitating the analysis, creating draft and final versions of documentation and contributing recommendations during document review cycles.

- Develop, maintain, and update a configurable set of project/release documents and plans tailored to each CM project/release, including an annual lesson learned review of project/release guidance material to capture recommendations, coordinate, and implement changes.
- Develop and maintain a schedule of required project/release milestone activities and documentation and associated information, including documenting reviews, coordinating recommendations, and tracking actions to closure.
- Ensure that each project/release has a plan for ensuring that the IRS-CI PMO, Delivery and Business Partners are ready for deployment from a people perspective (including staffing, labor relations, training, and communications), a process perspective (including business processes, operational processes, and operational and infrastructure documentation), and a technology perspective (including ensuring that the technical operational production environment is in place to support the processing requirements associated with the project/release implementation).
- Support all project reviews (e.g., Project/Release Readiness Reviews, Sprint Reviews, Project/Release Milestone Exit Reviews and other program and project reviews) by developing the schedule and agenda; developing, coordinating, and producing meeting materials; facilitating sessions; documenting artifact defects and changes; and tracking actions, risks, and decisions. Ensure that IRS-CI Contractor managed GFE tools supporting the lifecycle are maximized to the fullest extent feasible to realize efficiencies in the creation, traceability, incorporation of metrics to evaluate release/project status/health, and review of any required milestone documentation.

New Solution Assumptions and Key Goals

- A1. These requirements are intentionally documented at a high-level to assist with evaluating potential platforms or solutions for the new CI CM. References to “the system” or “the new system” in this document typically refer to the desired new solution for CI Case Management.
- A2. Front end access to all relevant systems for the performance period shall be provided to cleared supporting Contractor personnel within the first month (if/when feasible) to facilitate the understanding of existing systems, data and interfaces (e.g. front-end access to CIMIS and AFTRAK within the first month of the base period).
- A3. Identification of and direct connection to any systems or interfaces (e.g. external APIs) that require a push or pull from the New Solution must be mutually agreed upon and made available within the first 3 months of each yearly performance period (e.g. CI LDAP/ADFS, CIMIS, Dairy, and AFTRAK for base year).
 - a. Note, however, that any system within the IRS CI Network may be given access to the New Solutions existing API’s at any point for their own needs.
- A4. All users of and API calls made to the New Solution are expected to come from within the IRS CI network and be authenticated against IRS CI’s existing LDAP and ADFS.
- A5. The Contractor is responsible for the configuration of the New Solution and its environment to ensure delivery, but not the configuration of other either existing or 3rd party software, including legacy systems (e.g. legacy CIMIS, legacy AFTRAK)

- A6. The Contractor will work directly with users and business stakeholders to ensure migration timelines and user needs are achieved, prioritizing the Desired Outcomes and associated capabilities documented below.
- A7. These requirements are based on the current features and functionality of existing CI systems that comprise the needs for a new Case Management system. There are opportunities for consolidation and process improvement, i.e. future state goals, that are not documented here. The system must be flexible enough to allow for future enhancements and improvements over time.
- A8. The system must model the CI organizational hierarchy and roles and restrict access to entities and activities based on each user's role and location in the organization. For example:
- a. Each CI field office (FO) includes multiple groups housed in places of duty (PODs) across multiple states. Each field office (FO) has one special agent in charge (SAC) and multiple assistant special agents in charge (ASACs). ASACs report to their FO's SAC and manage multiple groups in each field office. Supervisory special agents manage each group and report to an ASAC. Special agents in each group report to a single SSA. (Sample is in the Attachment 4).
 - b. SACs report to Director of Field Operation (DFO) staff.
 - c. Various personnel, based on their position or assigned role, have permissions to perform activities or approvals or data management. Some roles are administrative/support and not investigative. The new system must provide a granular method to define specific permissions that align with roles that exist in CI. All actions in the system must be restricted to roles authorized to perform those actions. (Sample is in the Attachment 4).
- A9. The system's search functionality must be flexible and comprehensive. It should allow users to locate entities like investigations, assets, or personnel by using multiple search criteria. For example, when initiating a case, agents need to perform deconfliction using a wide range of criteria that should search investigations across the entire system. As another example, seized assets might need to be located using a combination of CI field office/group, the related investigation, seizure location, or specific seizure criteria. (Sample is in the Attachment 4).
- A10. The system must have a robust and flexible system for creating reports. Some reports may be eligible to be replaced by system screens, views, or dashboards, but a significant number of reporting needs will still exist. The layout/formatting and file format of specific reports and exports is critical as many of the reports are used in existing processes outside the scope of the new system. This smaller subset of external reports that have inflexible formatting will be identified by the government within the first month of the period of performance and will be the exception when no other feasible options exist.
- A11. Many steps in the CI investigative process currently require manual completion and signing of forms which are recorded in CIMIS and uploaded to TIMS. The new system should be designed

so that completing, signing, and submitting internal forms outside of the system is replaced with new workflows and processes entirely inside the system.

- a. External form completion should be minimized or removed wherever possible. Requests managed in the system and review/approval workflows should replace most forms currently in use in the CI investigative lifecycle.
- b. For forms that cannot be replaced by workflows, the new system should leverage system data to auto-generate completed forms in any required formats.

(Sample is in the Attachment 4).

A12. Some requests for investigative assistance require agents to create tickets in external systems. It is a goal of the new system for agents to be able to create most assistance requests inside of the system and for groups assigned to perform those tasks to view, assign, and record the fulfillment of those requests in the system.

(b)(7)(E); (b)(2)

(b)(7)(E); (b)(2)

(b)(7)(E); (b)(2)

- A15. The system must allow admins to easily update and modify general reference lists, i.e. the data that populates dropdown lists like asset type categories, cost centers, lien statuses, etc.
- A16. The system must be capable of handling 3,200 users across various roles and responsibilities. The system must be scalable and capable of handling additional users in the future.
- A17. Any provider of a new system should be able to provide guidance and direction on migrating legacy data into the new solution.
- A18. The system must be capable of meeting performance and uptime SLAs that align with a critical enterprise application.
- A19. All activities in the system, both transactional and administrative, must be logged with enough detail to provide a sufficient audit trail (timestamp, activity, user, affected entity, IP, etc.).
- A20. Security and appropriate data governance must be at the core of all functionalities, integration, and design decisions.

(b)(7)(E); (b)(2)

- A22. Screenshots provided are not intended to be recommended guidance for layout or formatting for the new system; they are intended to provide a feel for the scope and type of data that will need to be managed in the new system. (Screenshots are in the Attachment 4).

Functionality Requirements

CIMIS

CIMIS is the case management system of record for IRS CI. CIMIS is an IRM-mandated system that houses CI employee information, investigative equipment, investigations, and time reporting. CIMIS supports investigations throughout the entire investigative lifecycle, including case initiation, escalation, approvals, reviews, prosecution support, seizures, investigative assistance requests, enforcement, and administrative functions.

Listed below are the very high-level features and functions that the new system must provide, organized by subject area:

withheld pursuant to section

(b)(2) ; (b)(7)(E)

of the Freedom of Information and Protection of Privacy Act