



# Instructions for Completing the IT Program Optimization Review Template

An Additional Help for ADS Chapter 548

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# Instructions for Completing the ADS 548 IT Program Optimization Review Template

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The Program Manager (PM) or the PM’s designated representative must complete the [ADS 548 IT Program Optimization Review Template](#) and provide supporting documentation to facilitate the review. Examples of documentation for each type of ADS 548 Review are provided in Table 1, below.

The PM or the PM’s designated representative is responsible for contacting M/CIO/IA to initiate ADS 548 Reviews. Please refer to Table 1 to determine when an ADS 548 review should occur and what basic documents are required to support the review.

Once completed, the ADS 548 Program Optimization Review Template must be submitted to [ADS-548Review@usaid.gov](mailto:ADS-548Review@usaid.gov).

Questions may also be submitted to [ADS-548Review@usaid.gov](mailto:ADS-548Review@usaid.gov).

M/CIO will verify the completeness of each request submission within one U.S. business day and will complete the Review and respond within seven U.S. business days of the receipt of a complete submission. Please see Figure 1, below, for the ADS 548 workflow.

## ADS 548 Review Types

Table 1 provides information on the timing of reviews, supporting documentation, and the review outcomes.

**Table 1. ADS 548 Review Types**

Review Type	Timing	Result	Applies to	Level	Submitter	Participants	Documentation
1. Project Design Review	Development of PAD	CIO recommendations on potential IT innovation and enablement.	A, G, C	Project	PM	Mission, OAA, M/CIO	Design documents.
2. Pre-solicitation Review	Development of RFP, RFA, IFB	CIO recommendations on clarity, compliance and efficacy of IT requirements.	A, G, C	Award	OAA	Mission, OAA, M/CIO	Annual Program Statement, IFB, RFP, RFA, or IFB.
3. Proposal Technical Review	Technical Evaluation	CIO evaluations of capability, capacity, compliance, cost effectiveness, and potential efficacy of IT services or resources proposed.	A, G, C	Award	OAA	Mission, OAA, M/CIO	Proposal documentation.

Review Type	Timing	Result	Applies to	Level	Submitter	Participants	Documentation
4. Standard Technical Review and Approval	Within 30 days after award	CIO concurrence or remediation requirements.	A, G, C	Award	Mission	Mission, OAA, M/CIO	Proposals, Bill of Materials template, and other documents, as necessary.
5. Annual Technical Review	Annually during Period of Performance (PoP)	CIO recommendations.	A, C	Award	Mission	Mission, OAA, M/CIO	Previously submitted Standard Review template and Annual Review checklist.
6. Extensive Technical Review	As needed	CIO remediation and risk mitigation recommendations.	A, C	Award	Mission	Mission, OAA, M/CIO	Documentation will vary with the focus of the review.
7. Closeout Technical Review	Within 60 days of PoP end	Evaluation of execution to plan, cost-benefit, and compliance. Assistance with disposition.	A, G, C	Award	Mission	Mission, OAA, M/CIO	Previously submitted Standard Review template with Closeout checklist.

## Instructions for Completing the ADS 548 IT Program Optimization Review Template

The ADS 548 IT Program Optimization Review Template includes sections that are related to acquisition of hardware, software, services, and training. The complexity and level of detail of the information submitted should be commensurate with the complexity and cost of the project and acquisition.

### Note:

In the context in which it is used in the ADS 548 documents, “**Program**” refers to a temporary organizational entity that is created to develop, coordinate, and manage multiple, related “**Projects**,” which, together, serve to support the organization’s strategic objectives. Programs often span multiple years and may involve layered and interdependent projects.

A **Program** encompasses a series of related and possibly interdependent projects that jointly deliver an overall mission objective. This may entail coordination among scheduling subsets of the projects that make up the program and compiling high-level performance monitoring data from project components for consolidated reporting on Program progress.

A **Project** has its own schedule, milestones, and processes for monitoring and reporting progress, issues, and risks. These are set within a deliverable-focused framework of management processes established by Program Management policies and standards.

### General Instructions:

- Please complete all relevant sections of the template. An incomplete template will delay the review response.
- Please do not remove fields or sections from the template.

- If a field or requested information is not available or not applicable, please provide a reason.
- If additional information, not specifically requested in the template, is believed to be relevant and helpful to the review, please include it in the section where it is most appropriate.

## **Section-by-Section Guidance**

### **1. Type of Review Requested (check one)**

Check the type of review being requested: Project Design, Pre-solicitation, Post Proposal, Annual, Extensive, or Closeout. (See Table 1, above, for more details)

### **2. Project Information**

Provide the complete Project Title, as well as the name of the Program under which this Project operates, if applicable. Provide contact information for the current proposal and information about any related procurements. “Implementing Partners” are the vendors, contractors, and other organizations that provide support, assistance, or cooperative ownership of the project. Provide the total projected cost for the procurement(s) being proposed. This amount should include only the procurements being considered in the current Review Request; costs for previous procurements and/or ancillary components and infrastructure may be detailed in later sections.

### **3. Procurement Type (check the one that are applicable)**

Select all applicable components included in this procurement request: hardware, software, services, and training.

### **4. Award Type(s) (check one)**

Select the type of awards utilized for this project and procurement request. See [ADS 303](#) for more information.

### **5. Project Business Objective**

Describe the business need(s) that the proposed procurements are intended to support. Briefly describe the purpose of the project.

### **6. Project Scope**

Briefly describe the scope of the procurement as it relates to the overall Program.

### **7. Current Program Phase**

Briefly describe the phase of the Program in which the current proposal resides (e.g., Planning, Requirements, Design, Integration, Test and Acceptance, or Deployment).

### **8. Related Procurements and Projects**

Briefly describe any past or expected procurements and projects, including objectives and major IT components procured and implemented. This is very important if this procurement is an add-on or amendment.

## **9. Applicable Conditions**

State all significant conditions affecting the acquisition, such as: requirements for compatibility with existing or future systems or programs and any known cost, schedule, and capability or performance constraints.

## **10. Schedule**

Provide a general schedule for the procurement.

## **11. Security Information**

Briefly describe IT security considerations and measures.

## **12. Privacy Information**

Briefly describe IT privacy considerations and measures.

## **Project/Procurement Acquisition Information**

### **13. Acquisition Cost Summary Information**

Summarize the cost information contained in the Bill of Materials Spreadsheet according to the tabbed categories provided: Hardware, Software, Services, Training, and Summary. Discuss the consideration of life-cycle cost in the current procurement, if appropriate. Please provide costs in U.S. dollars. Procurement documents may be substituted for the Bill of Materials if M/CIO determines that they are sufficiently detailed for assessment. Please contact [ADS-548Review@usaid.gov](mailto:ADS-548Review@usaid.gov) to discuss this option.

### **14. Site/Logistics Information**

Procurements often involve multiple sites where acquired items will be deployed. Provide details about the different sites involved in the project and the distribution of proposed components and services, accordingly. Detailed cost information for each site should be provided on individual tabs within the Bill of Materials Spreadsheet. Information should also be aggregated and totaled in another summary tab of the spreadsheet in order to provide a total procurement view.

### **15. Implementation and Associated Sites**

Provide a list of proposed implementation locations and the associated number of users for each.

### **16. Hardware**

- **Performance.** Specify the required capabilities or performance characteristics of the supplies or the performance standards of the services being acquired and state how they are related to the need.

### **17. Software**

Provide information on the software included in the procurement. In general, the procurement of the latest versions of software is recommended.

- **Performance.** Specify the required capabilities or performance characteristics of the supplies or the performance standards of the services being acquired and state how they are related to the need.
- **Objectives.** Provide information pertaining to the purpose of the proposed software and its alignment with the project objectives, as well as the relation to other components in the procurement and project.

## **18. Services**

Provide information on the services being acquired, including the scope, duration, cost and the number of personnel involved. Please explain why any duplicated services are not consolidated.

## **19. Training**

Provide information on the training being acquired, including duration, cost, and the number of personnel to be trained. Include special considerations as necessary.

## **20. Security Strategy**

Briefly describe the IT security strategy.

## **21. Acceptance**

Explain the processes and procedures used to gain acceptance or sign off of delivery or completion of service. Detail any personnel involved, along with their responsibilities and the level of acceptance required.

## **22. Closeout**

These reviews will begin in FY2015.

Complete the closeout section of the original ADS 548 Standard Review Request Template for the project. Provide the information requested on the [Closeout check list](#) (in that section) regarding the project's execution against plans, technical capacity, performance, cost-benefit, and compliance.

Indicate what IT equipment will be transferred or disposed of at the end of this project and specify planned ongoing operations and maintenance activities

## **23. Additional Information**

Provide any additional information that is relevant to the procurement. You may provide a link to or attach additional information that is pertinent to the review.

## ADS 548 Review Work Flow

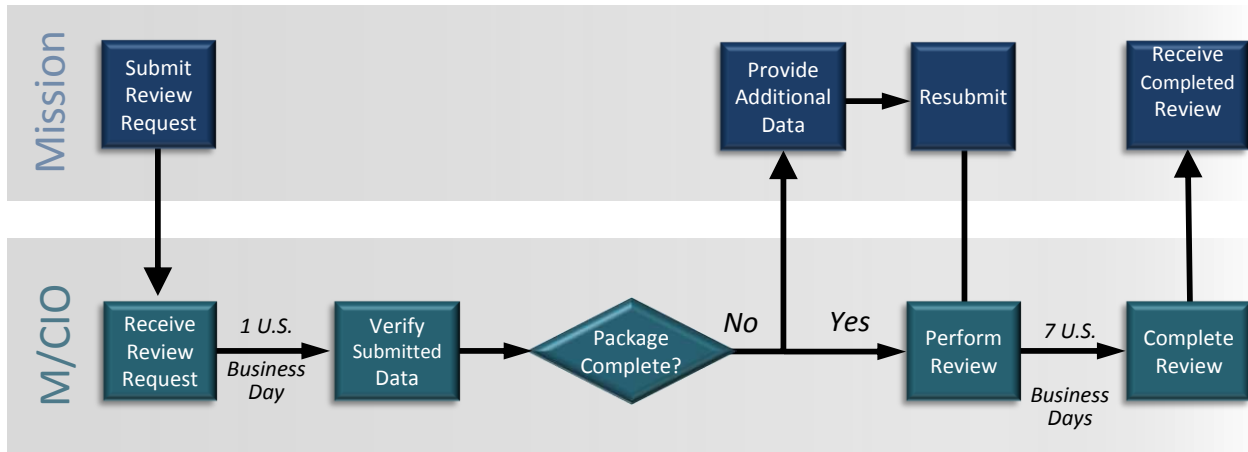


Figure 1. ADS 548 Review Workflow

## List of Abbreviations

ADS	Administrative Directive System
CIO	Chief Information Officer
IA	Information Assurance
IFB	Invitation for Bid
IT	Information Technology
M	Bureau for Management
OAA	Office of Acquisition and Assistance
PAD	Project Appraisal Document
PM	Program/Project Manager
PoP	Period of Performance
RFA	Request for Assistance
RFP	Request for Proposal