AMERICAN BATTLE MONUMENTS COMMISSION

Performance Work Statement

For

Freshworks Licenses, Implementation, and Maintenance

May 12, 2026

CAUTION:

Interested Contractors shall submit proposals that are clear, technically accurate, and tailored to each requirement in this Performance Work Statement. Proposals shall explain the Contractor's specific approach and deliverables; proposals that merely restate requirements without a workable solution may be considered non-responsive.

ABMC recognizes that Contractors may use drafting tools to support proposal development. Regardless of tools used, the proposal must reflect the Contractor's own understanding, capabilities, and proposed approach. ABMC may consider proposals non-responsive if they are generic, internally inconsistent, or not aligned to the requirements in this solicitation.

Contractors shall ensure proposals are reviewed by qualified subject matter experts and demonstrate a working understanding of ABMC's mission, constraints, and operating environment.

Contents

SECTION 1: BACKGROUND 4
Statement of Needs 4
Information Technology (IT) Environment 4
SECTION 2: SCOPE OF WORK 5
CLIN 0001-Software Licensing (Base and Four Option Years) 5
Licenses for CLIN 0001 (12-month term) 6
Licenses for CLINs 0003 & 0004 (6-month term) 6
Licenses for CLIN 0005 (Optional) 6
CLIN 0002-ITSM Foundation, ManageEngine Migration and Initial Departmental Workflows 8
CLIN 0003-Operations, Finance, Administration, and Collections Integrations 10
CLIN 0004-Administrative and Cemetery Mailboxes Integrations 13
CLIN 0005-(Optional) Freddy AI 16
CLIN 0006-(Optional) Additional Consulting and Configuration Services (On-Demand Enhancements) 18
CLIN 0007-Operations and Maintenance 20
SECTION 3: KEY PERSONNEL 22
SECTION 4: PROPOSAL FORMAT 23
Evaluation Criteria 24
SECTION 5: GENERAL INFORMATION 25
Key Requirements 25
Controls and Change Management 25
Payment Schedule 25
Post-Award Meetings 26
Project Start Date & Kick Off 26
Language Requirements 26
Section 508 Requirements 26
Holidays and Work Hours 26
Appendix A: Estimated Breakdown of Workflows by Site 27

SECTION 1: BACKGROUND

American Battle Monuments Commission (ABMC) is an independent federal agency responsible for commemorating the service and sacrifice of members of the United States Armed Forces. ABMC operates and maintains 26 cemeteries and numerous memorials and monuments across 17 countries, with staff located in Arlington, Virginia; Paris, France; and at overseas sites.

ABMC currently utilizes ManageEngine for IT service management (ITSM) functions and requires an integrated, enterprise-wide platform capable of supporting structured enterprise case management workflows across Public Affairs, Historical Services, Human Resources, Operations, Finance, and other mission-support offices.

Statement of Needs

ABMC requires a consolidated, cloud-based Commercial-Off-The-Shelf (COTS) Freshworks enterprise service management (ESM) platform to replace its existing ITSM solution and implement standardized customer and enterprise case management capabilities across the agency. The solution must support approximately 550 internal users and designated agents, public media and historical service inquiries, and enable consistent intake, routing, Service Level Agreement (SLA) management, reporting, automation, and role-based access control.

The platform must integrate with Microsoft 365 E5 and Microsoft Entra ID, support secure public-facing intake where required, and provide enterprise-grade auditability and data governance.

ABMC requires subscription licenses and professional services necessary to configure, migrate, integrate, secure, train, and deploy the platform in phased increments, beginning with ITSM migration, Historical Services, Human Resources and Public Affairs case workflows and expanding to additional departments and global sites.

Information Technology (IT) Environment

ABMC operates a Microsoft 365 E5 hybrid enterprise environment with identity services managed through Microsoft Entra ID, supporting Single Sign-On (SSO), multi-factor authentication, and conditional access policies. Endpoint and mobile device management are administered through Microsoft Intune. The enterprise architecture emphasizes role-based access control, centralized logging, and secure cloud integrations.

Any proposed solution must integrate with Microsoft Entra ID for identity federation, support standards-based provisioning such as SCIM where available, and align with federal cybersecurity, identity governance, and audit requirements.

ABMC currently utilizes ManageEngine as its enterprise ITSM platform supporting incident management, service requests, change management, and asset tracking. The system maintains historical service records and a Configuration Management Database (CMDB) containing enterprise hardware and software assets across domestic and international locations. Core workflows support ticket intake, routing, escalation, and resolution. However, the current

platform is limited to IT service management functions and does not provide integrated ESM or structured case management capabilities for non-IT departments, resulting in additional inquiry and workflow processing occurring outside the ITSM system.

SECTION 2: SCOPE OF WORK

This contract is structured using Contract Line Item Numbers (CLINs) to organize the acquisition of software, implementation services, optional capabilities, and long-term sustainment in a phased and controlled manner.

1. **CLIN 0001** provides the required Freshworks software licenses for ITSM and business agents, structured with a base year and four option years and aligned to the phased rollout. This CLIN shall be firm-fixed price.
2. **CLIN 0002** establishes the foundational implementation of the Freshworks platform, including core ITSM configuration, migration from ManageEngine, and initial departmental workflows. This CLIN shall be firm-fixed price.
3. **CLIN 0003** expands the platform to additional departments and global sites, deploying standardized enterprise service management and case management capabilities across the enterprise. This CLIN shall be firm-fixed price.
4. **CLIN 0004** focuses on optimization, enterprise standardization, and additional workflow deployment. This CLIN shall be firm-fixed price.
5. **CLIN 0005** provides **optional** Freddy AI licensing to enable AI-assisted capabilities. This CLIN shall be firm-fixed price.
6. **CLIN 0006** provides **optional** consulting and configuration services for future workflow expansion or new facilities. Work shall be authorized in writing by the Contracting Officer and is priced as fixed-price per authorized task unless otherwise authorized by the Contracting Officer.
7. **CLIN 0007** provides operations and maintenance support to sustain the platform during the base year and option periods. This CLIN shall be firm-fixed price.

This CLIN structure allows ABMC to implement the platform in phases, control licensing activation, and maintain flexibility for future expansion while ensuring predictable costs across the contract period.

Contractor shall manage kickoff meetings for each CLIN with different stakeholders, maintain a project schedule, track milestones, provide weekly status reports, and maintain a log of risks, issues, actions, and decisions. Contractor shall provide a project manager, a business analyst, and a configuration specialist and/or developer.

CLIN 0001-Software Licensing (Base and Four Option Years)

CLIN 0001 provides the Freshworks software subscriptions required to operate the IT service management and ESM platform implemented under CLINs 0002 through 0006. Contractor shall coordinate with the software manufacturer, Freshworks, to provide the licenses necessary to support IT service management agents, departmental agents, and case management users. Licensing shall support management of approximately 2,500 hardware and software assets within the Freshservice platform. Licenses shall be provided for one base year and four option

years and shall be activated in phases consistent with the implementation schedule defined under CLINs 0003 and 0004.

Scope

1. **License Provisioning**
   Contractor shall provide the Freshworks licenses required to operate the platform for ABMC personnel. Licenses shall support Office of the Chief Information Officer's IT service management agents and business agents supporting departmental workflows, and agents supporting Historical Services, Human Resources, and Public Affairs case management functions.

2. **Year One Licensing Structure**
   Licenses for the first year shall be activated according to the implementation schedule and shall include the following:

Licenses for CLIN 0001 (12-month term)

- Twelve (12) Freshservice Pro Agent licenses supporting the IT service management team
- Fifteen (15) Freshservice Business Agent licenses supporting Human Resources departments in US and overseas locations
- Ten (10) Freshdesk Pro Agent licenses supporting Public Affairs and Historical Services public-facing intake and communications (when Freshdesk is used for those functions)
- Freshservice capability to manage approximately 2,500 hardware and software assets

Licenses for CLINs 0003 & 0004 (6-month term)

- Fifty-five (55) Freshservice Business Agent licenses supporting additional operations, administration, and Cemetery sites

Licenses for CLIN 0005 (Optional)

- Freddy AI for 12 IT agents

Licenses associated with CLIN 0001 shall be activated at project kickoff. CLINs 0003 and 0004 licenses shall be activated when expansion activities begin. CLIN 0005 licensing shall be activated when directed in writing by the Contracting Officer.

3. **Option Year Licensing Structure (Years 2 to 5)**

Beginning in Year 2 and continuing through each exercised option year, the following annual license quantities shall be maintained:

• Twelve (12) Freshservice Pro Agent licenses supporting the IT service management team
• Seventy (70) Freshservice Business Agent licenses supporting non-IT departments and global operations
• Ten (10) Freshdesk Pro Agent licenses supporting Public Affairs and Historical Services public-facing intake and communications (when Freshdesk is used for those functions)
• Freshservice capability to manage approximately 2,500 hardware and software assets

Each option year represents a twelve-month subscription period that may be exercised at ABMC's discretion.

4. License Administration
   Contractor shall coordinate with Freshworks to ensure the correct license quantities are provisioned and available for assignment. Contractor shall ensure ABMC administrators are able to view license allocations and reassign licenses as needed within the purchased quantities.

5. Compliance Requirements
   All software provided under this CLIN shall meet the security and hosting requirements defined in this Performance Work Statement. The platform shall support integration with Microsoft Entra ID for authentication and shall maintain appropriate access control and logging capabilities.

Deliverables

Contractor shall provide the following deliverables:

• License bill of materials identifying license quantities for Year One and each option year
• License activation schedule aligned with each CLIN implementation activities
• Annual pricing schedule for the base year and each option year
• Confirmation that the licensing configuration supports management of approximately 2,500 IT assets
• Documentation describing license administration procedures for ABMC administrators
• Contact information and procedures for license renewal coordination

CLIN 0002-ITSM Foundation, ManageEngine Migration and Initial Departmental Workflows

CLIN 0002 provides the professional services required to implement the Freshworks IT service management (ITSM) platform for ABMC. Contractor shall configure, test, and deploy Freshservice and migrate existing ITSM records from ManageEngine. This CLIN establishes the core ITSM capability for ABMC and introduces structured case workflows for four business offices: Information Technology, Human Resources, Historical Services, and Public Affairs.

This CLIN includes configuration of the service platform, data migration and validation, identity integration with Microsoft Entra ID, initial asset ingestion, workflow setup, training, and deployment support. Upon completion, the platform shall be operational and ready to support ABMC staff and subsequent expansion under later CLINs.

Scope

1. Platform Configuration: Contractor shall configure the Freshservice environment for production use. Configuration shall include service categories, user groups, roles and permissions, notification templates, business hours, and service level policies. Access controls shall support appropriate separation of duties and role-based access for administrators, agents, and requesters.

2. ITSM Workflow Configuration: Contractor shall configure core IT service management functions including incident management, service requests, intake forms, a basic service catalog, change management, problem management, service level policies, assignment rules, and escalation rules. The configuration shall support approximately twelve (12) IT agents and approximately 550 internal users who may submit service requests.

3. Data Migration and Validation from ManageEngine: Contractor shall prepare and execute the migration of existing service records and asset data from the current ManageEngine system into Freshservice. This includes developing a migration plan, mapping data fields between systems, performing one test migration, validating the results, and executing the final migration. Contractor shall provide a reconciliation report summarizing migrated records and any exceptions.

4. Initial Asset Data Integration: Contractor shall establish initial asset tracking within Freshservice by importing asset data from one existing source system, such as Microsoft Intune or another approved inventory source. Contractor shall define the asset categories, map relevant fields, and validate that asset records are correctly imported and visible within the system.

5. Identity Integration: Contractor shall configure Single Sign-On between Microsoft Entra ID and Freshservice. The configuration shall support authentication for requesters, agents, and administrators. Where supported, automated user provisioning may be implemented using standard identity provisioning methods. Contractor shall provide documentation describing the configuration and administrative procedures.

6. Department Case Workflows: Contractor shall configure structured case workflows for the following ABMC offices: Public Affairs, Human Resources, and Historical Services. Each workflow shall include intake forms, routing rules, status tracking, and reporting. The system

shall also support intake from designated shared mailboxes to create and route records within Freshservice.

7. Public Website Intake Form: Contractor shall configure one integration from an ABMC public website form so that submitted requests create records in Freshservice. Contractor shall configure field mapping, routing rules, and confirmation messages for the requester.

8. Training and Deployment Support: Contractor shall provide one training session for system administrators & IT service staff, one for Public Affairs staff, and one for Historical Services staff. Training materials shall include presentation slides and user guides. Contractor shall assist with deployment planning and provide a short stabilization period following system launch.

Deliverables
Contractor shall provide the following deliverables:

1. Project kickoff summary and approved project schedule
2. Weekly status reports and issue tracking log
3. System configuration documentation describing workflows, intake forms, roles, and permissions
4. Data migration and validation plan and field mapping documentation
5. Test migration results and validation summary
6. Final migration execution report and reconciliation summary
7. Configured ITSM workflows within the platform
8. Configured case workflows for Public Affairs, Human Resources, and Historical Services
9. Asset data integration and documentation
10. Entra ID Single Sign-On configuration and documentation
11. Documentation describing the public website form integration
12. Training materials and training sessions for designated users
13. Deployment readiness checklist
14. Transition documentation for ABMC administrators

Acceptance Criteria
CLIN 0002 shall be considered complete when ABMC confirms in writing that the following conditions are met:

1. Platform Configuration
   The Freshservice environment is configured with defined roles, permissions, service categories, and notification settings and is accessible to designated ABMC users.

2. ITSM Functionality
   Incident and service request workflows operate from submission through assignment and closure. Service level policies function as configured and escalation behavior can be demonstrated.

3. Data Migration and Validation
   Contractor completed the test migration and final migration, and ABMC verified migration results using the reconciliation report. “99.5% or greater accuracy” means at least 99.5% of migrated records in the agreed-upon population (as defined in the approved migration plan) match the source system for required fields after de-duplication and any Government-

approved exclusions. Contractor shall document all exceptions, unmapped fields, and excluded records in the final reconciliation summary.

4. Identity Integration
   Single Sign-On using Microsoft Entra ID functions for system users, and authentication can be validated for requester, agent, and administrator roles.

5. Department Workflows
   Public Affairs, Human Resources, and Historical Services workflows and intake forms operate as configured and can accept and route requests. Service level policies function as configured and escalation behavior can be demonstrated.

6. Website and Email Intake
   The public website form integration and designated shared mailbox intake create records within the system and route them appropriately.

7. Training and Deployment
   Training sessions were conducted, materials were delivered, and the system was placed into operational use with a brief stabilization period following launch.

Completion of CLIN 0002 results in an operational enterprise IT service management platform and initial departmental case management capability for ABMC.

CLIN 0003-Operations, Finance, Administration, and Collections Integrations

CLIN 0003 expands the Freshservice ESM platform implemented under CLIN 0002 to support additional ABMC departments and overseas cemetery and memorial sites. Contractor shall configure additional case management workflows and deploy structured request intake across headquarters and field locations. Work includes additional workflow configuration, email-based intake for designated mailboxes, integration of additional public request forms, reporting improvements, and training. The objective of CLIN 0003 is to provide a consistent method for receiving, tracking, and resolving requests across ABMC offices and sites while maintaining appropriate access controls for each department.

Scope

1. Additional Department Workflows: Contractor shall configure case management workflows for additional ABMC offices including Operations, Finance, Administration, and Collections. Each workflow shall include intake forms, routing rules, status tracking, task assignment, permissions, and basic reporting.

3. Email Intake Configuration: Contractor shall configure Freshservice to receive requests submitted through designated shared mailboxes used by ABMC operations. The system shall create records from incoming messages and apply the appropriate routing and categorization rules. Mailboxes to be configured will be identified by ABMC and listed in Appendix A.

4. Additional Public Request Form Integrations: Contractor shall implement two additional integrations from ABMC public website forms so that submitted requests create records

within Freshservice. Contractor shall configure field mappings, routing rules, and confirmation messages.

5. System Alert Integration: Contractor shall configure at least one additional integration to allow an external alert source to create records within Freshservice. Contractor shall configure severity levels, routing rules, and validation tests.

6. Reporting and Dashboards: Contractor shall configure reporting dashboards that provide visibility into requests across departments and sites. Dashboards shall support monitoring of request volumes, response times, and workload distribution.

7. Documentation Updates: Contractor shall update the system configuration documentation created under CLIN 0002 to reflect new workflows, integrations, and system settings implemented under CLIN 0003.

8. Training and Deployment Support: Contractor shall provide training for newly participating departmental staff and designated cemetery personnel. Training materials shall be updated to reflect CLIN 0002 functionality. Contractor shall support system rollout and provide a short stabilization period following deployment.

Period of Performance
CLIN 0003 shall be completed within four (4) months from the CLIN 0003 kickoff meeting unless otherwise approved in writing by the Contracting Officer. CLIN 0003 shall be performed as a firm-fixed-price effort.

Deliverables
Contractor shall provide the following deliverables:

1. CLIN 0003 kickoff summary and updated project schedule
2. Discovery session summaries and workflow requirements documentation
3. Updated system configuration documentation
4. Configured departmental workflows for Operations, Finance, Administration, and Collections
5. Configuration templates for cemetery and memorial sites
6. Email intake configuration for designated shared mailboxes
7. Documentation describing the alert integration
8. Two configured public website form integrations
9. Configured dashboards and reports
10. Updated user and administrator documentation
11. Training materials and delivered training sessions
12. Deployment stabilization summary and transition documentation

Acceptance Criteria

CLIN 0003 shall be considered complete when ABMC confirms in writing that the following conditions are met:

1. Department Workflows
   Configured departmental workflows and intake forms accept requests, route them to the appropriate users, and allow requests to be tracked through completion. Service level policies function as configured and escalation behavior can be demonstrated.

2. Site Deployment
   Configuration templates for cemetery and memorial sites are implemented and validated in at least one test location prior to broader deployment.

3. Email Intake
   Incoming messages from designated mailboxes create records in the system and route to the correct department or site.

4. Website Form Integration
   Each implemented public request form successfully creates a record within Freshservice with the expected information fields populated.

5. Alert Integration
   Configured alert sources generate records within the system and apply the defined routing rules.

6. Reporting
   Configured dashboards display request volume, response activity, and other operational information needed by ABMC managers.

7. Documentation
   System documentation is updated to reflect CLIN 0003 configurations and administrative procedures.

8. Training and Deployment
   Training sessions are completed and materials delivered. The system is placed into operational use with a short stabilization period following deployment.

Completion of CLIN 0003 results in an expanded enterprise case management capability supporting ABMC departments and overseas sites within the Freshservice platform.

CLIN 0004-Administrative and Cemetery Mailboxes Integrations

CLIN 0004 improves and standardizes the Freshservice ESM platform following the deployments completed under CLINs 0002 and 0003. Contractor shall refine workflows, intake forms, enhance reporting, and standardize configurations across ABMC Arlington, Paris, and all cemetery sites. This work focuses on improving operational efficiency, establishing consistent workflows across locations, and ensuring the platform can support long-term operations.

Contractor shall configure the system to support request intake and tracking for ABMC's overseas cemeteries and memorial sites and the Paris office. Contractor shall implement configuration templates that can be applied across sites to support consistent intake and routing. A standard configuration shall support most sites, while a separate configuration may be applied to higher-volume locations that require additional routing or reporting capabilities. The system shall create records from incoming messages and apply the appropriate routing and categorization rules. Mailboxes to be configured will be identified by ABMC and listed in Appendix A.

Discovery sessions and site validation activities are described in the Scope and Acceptance Criteria sections below.

Contractor shall establish standardized deployment templates to ensure consistency across sites while accommodating operational differences. This includes:

1. A Standard Site Template applicable to most cemetery locations with smaller staff and lower inquiry volumes. The template shall include standard inbox intake, routing rules, case categories, response templates, and reporting configuration.
2. A Visitor Center Template applicable to high-volume locations such as Normandy, Manila, and Luxembourg. This template shall support expanded categories, additional routing and escalation logic, visitor inquiry management, and more granular reporting.

Contractor shall deploy site configurations using a phased rollout approach. Sites shall be implemented in waves, beginning with a limited number of pilot locations to validate configuration, workflow routing, and reporting. Following successful validation, remaining cemetery sites shall be deployed in batches using the established templates.

For each site or deployment wave, Contractor shall ensure the configuration meets defined completion criteria. A site shall be considered operational when:

1. The site inbox is connected to Freshservice.
2. Test submissions successfully create tickets and route to the correct queue.
3. Standard response templates and workflow configurations are loaded.
4. Reporting dashboards display ticket volume and SLA performance for the site or queue.

Activities under this CLIN include additional workflow configuration, automation enhancements, reporting improvements, template standardization, documentation updates, and administrative knowledge transfer to ensure the platform can be sustained and expanded across ABMC operations.

Scope

1. Operational Discovery and Workflow Review: Contractor shall conduct six discovery sessions with representatives from the Paris office and cemetery sites. These sessions shall review current request handling processes, intake methods, routing practices, and reporting needs. Contractor shall document recommended workflow improvements.

2. Workflow Improvements for Cemetery Operations: Contractor shall configure or refine workflows used by cemetery and memorial sites. These workflows may support activities such as visitor inquiries, records requests, facilities or maintenance requests, administrative coordination, and collections-related requests. Configuration shall include request categories, routing rules, status tracking, and assignment processes.

3. Standard Configuration Templates: Contractor shall establish and document configuration templates that can be used across ABMC cemetery sites. These templates shall support both standard sites and higher-volume visitor center locations. Templates shall include request categories, routing rules, service level policies, notifications, and reporting views so they can be reused for future site deployments.

4. Automation Improvements: Contractor shall configure system automation features that reduce manual processing of requests. These may include automatic categorization, routing rules, approval steps, escalation triggers, task assignments, and knowledge base references to assist agents during case handling.

5. Reporting Improvements: Contractor shall enhance system reporting to provide improved operational visibility. Dashboards shall support monitoring of request volumes, response times, workload distribution, and trends across departments and sites.

6. Email Intake Improvements: Contractor shall review and improve email-based request intake across configured mailboxes. Improvements may include consistent categorization rules, improved routing logic, and documentation describing mailbox configuration and operation.

7. Documentation and Knowledge Transfer: Contractor shall update system documentation created under earlier CLINs to reflect all configuration changes implemented under CLIN 0004. Documentation shall include workflow descriptions, configuration settings, and system administration guidance. Contractor shall conduct knowledge transfer sessions for ABMC administrators.

8. Stabilization Support: Contractor shall provide post-implementation support to validate system changes, resolve configuration issues, and assist ABMC administrators as the updated configuration is placed into operation.

Period of Performance

CLIN 0004 shall be completed within six (6) months following completion of CLIN 0003 unless otherwise approved in writing by the Contracting Officer. CLIN 0004 shall be performed as a firm-fixed-price effort.

Deliverables
Contractor shall provide the following deliverables:

1. Discovery session summaries and workflow improvement documentation
2. Updated system configuration documentation
3. Configuration templates for cemetery and visitor center sites
4. Updated workflows for cemetery operations
5. Documentation describing configured automation rules
6. Enhanced dashboards and reports
7. Updated email intake configuration documentation
8. Updated administrative runbooks and guidance
9. Knowledge transfer sessions for ABMC administrators
10. Post-implementation stabilization summary

Acceptance Criteria

CLIN 0004 shall be considered complete when ABMC confirms in writing that the following conditions are met:

1. Workflow Operation: Updated workflows accept requests, route them correctly, and allow requests to be tracked through completion for designated cemetery and headquarters operations. Service level policies function as configured and escalation behavior can be demonstrated.

2. Template Availability: Configuration templates for standard cemetery sites and higher-volume locations are documented and can be reused for future deployments.

3. Automation Functionality: Configured automation rules operate as expected and correctly apply routing, categorization, or approval logic.

4. Reporting Capability: Dashboards display request volumes, response activity, and other operational information needed for management oversight.

5. Documentation: System documentation and administrative guidance are updated to reflect CLIN 0004 configurations and are delivered to ABMC.

6. Stabilization Support: System updates are placed into operation and any configuration issues identified during the stabilization period are resolved.

CLIN 0005-(Optional) Freddy AI

CLIN 0005 provides optional licensing and configuration of Freshworks Freddy Copilot AI capabilities for use within the Freshservice and Freshdesk platforms. These capabilities are intended to assist designated agents in reviewing requests, generating draft responses, summarizing case activity, identifying relevant knowledge articles, and improving request categorization.

Initial implementation shall focus on clearly defined use cases, including:

• Case and ticket activity summaries to help agents quickly understand request history.
• Suggested response drafts to assist agents when replying to common inquiries.
• Knowledge assist to surface relevant knowledge base articles during case handling.
• Automated triage and categorization suggestions to improve routing and queue assignment.

AI capabilities shall initially be limited to specific queues or teams selected by ABMC. This controlled deployment approach allows ABMC to evaluate operational impact, accuracy, and usefulness before expanding to additional users or workflows.

AI licenses shall be assigned only to designated agents and may be expanded over time if additional users require access. ABMC may begin with a limited number of users and expand deployment only if the capabilities demonstrate measurable improvements in efficiency, response quality, or request handling performance.

Licensing shall be structured for one base year and four option years.

Scope

1. AI Capability Identification: Upon exercise of this CLIN, Contractor shall coordinate with Freshworks to identify the available Freddy AI features compatible with the platform configuration deployed under CLINs 0001 through 0004. Contractor shall document the recommended AI features that support request handling, case management, and knowledge usage within the platform.

2. AI License Provisioning: Contractor shall provide Freddy AI licenses for designated agents using Freshservice or Freshdesk. Licenses shall be assigned only to users authorized by ABMC and shall be scalable within the purchased quantities. AI licensing shall align with the agent-based licensing structure established under CLIN 0001.

3. Activation of AI Licenses: AI licenses shall not be activated or billed unless the Contracting Officer exercises this optional CLIN in writing. If exercised during the base year, licenses shall be activated upon written authorization from the Contracting Officer. If exercised during an option year, activation shall follow the pricing established for that option year.

4. AI Feature Configuration: If this CLIN is exercised, Contractor shall configure the AI features within the platform. Configuration may include enabling AI assistance for agents, connecting AI features to the knowledge base, and establishing administrative controls for enabling or disabling AI features for designated users.

5. Training and Administrative Guidance: Contractor shall provide training materials and guidance for agents who will use AI-assisted features. Contractor shall also provide administrative guidance to ABMC system administrators describing how AI features are enabled, monitored, and managed within the platform.

Deliverables

Contractor shall provide the following deliverables:

- Documentation identifying the Freddy AI features enabled within the platform
- License bill of materials identifying AI license quantities for the base year and option years
- Documentation describing AI configuration settings
- Administrative guidance for managing AI licenses and features
- Training materials for users of AI-assisted features
- Confirmation that AI features are enabled and functioning within the production environment

Acceptance Criteria

CLIN 0005 shall be considered complete for any exercised year when ABMC confirms in writing that the following conditions are met:

1. Feature Availability: Configured AI features are available within the Freshservice or Freshdesk environment and accessible to designated users.
2. License Assignment: Only authorized users have been assigned AI licenses.
3. Operational Function: AI features perform the intended functions, such as assisting with case summaries or draft responses, within the system.
4. Administrative Control: ABMC administrators are able to enable or disable AI features and manage license assignments.
5. Documentation and Training: Configuration documentation and training materials are delivered to ABMC.

CLIN 0006-(Optional) Additional Consulting and Configuration Services (On-Demand Enhancements)

CLIN 0006 is an optional reserve CLIN for additional configuration, integration, workflow development, or system improvements not included under CLINs 0001 through 0005. Work shall be performed only when authorized in writing by the Contracting Officer.

This CLIN allows ABMC to request additional work if operational requirements change or new services are introduced. Work may support new workflows, additional locations, expanded integrations, or improvements to the existing platform. Examples may include support for new ABMC facilities such as the Honolulu Interpretive Center or other future programs.

Work under this CLIN shall be performed only when the Contracting Officer (CO) gives written authorization. Authorization may be provided in writing, including via email.

Upon receipt of a written request from ABMC, Contractor shall provide a proposal within five (5) business days unless otherwise approved in writing by the Contracting Officer. The proposal shall include scope, assumptions and dependencies, approach, schedule, deliverables, acceptance criteria, and price.

Each approved enhancement shall be treated as a discrete task order or "mini-SOW" and shall include:

• Defined scope of work.
• Assumptions and dependencies.
• Deliverables and implementation activities.
• Acceptance criteria.
• Price and schedule.

Each approved enhancement shall be priced and performed in accordance with the approved proposal. Unless otherwise authorized in writing by the Contracting Officer, enhancements under this CLIN shall be fixed-price per authorized task. No work shall begin until the Contracting Officer approves the task scope and price in writing.

Scope

1. Additional Workflow Configuration: Contractor may configure additional workflows within the platform to support new operational needs. Work may include creation of new request types, intake forms, routing rules, task assignments, service level policies, or approval processes.

2. New Site or Facility Support: Contractor may configure the system to support new ABMC locations or facilities, such as Honolulu Interpretive Center in Hawaii. Work may include configuring workflows, request intake methods, user roles, and reporting views for new sites. Configuration templates established under previous CLINs may be reused or modified as needed.

3. System Integrations: Contractor may implement additional integrations between the Freshworks platform and other systems. These integrations may include Microsoft 365 services, internal ABMC systems, website request forms, monitoring alerts, or data reporting tools.

4. Platform Improvements: Contractor may perform additional configuration changes that improve system performance or usability. These may include workflow adjustments, automation rules, taxonomy updates, or knowledge base improvements.
5. Documentation Updates: For each authorized task, Contractor shall update the relevant system documentation to reflect any new configurations, workflows, or integrations implemented under this CLIN.
6. Training and Knowledge Transfer: Contractor shall provide training or administrative guidance for ABMC personnel when new workflows or system features are implemented under this CLIN.

Task Authorization

Work under CLIN 0006 shall be performed only after the Contracting Officer issues written authorization describing the requested work. Contractor shall provide a fixed-price proposal describing the work to be performed unless the Contracting Officer authorizes a different pricing arrangement in writing. Work shall begin only after the Contracting Officer approves the task scope and price in writing.

Deliverables

For each authorized task under CLIN 0006, Contractor shall provide:

• A brief description of the requested configuration or integration work
• System configuration updates or integrations implemented within the platform
• Updated system documentation reflecting the changes made
• Training materials or user guidance when applicable
• A task completion summary describing the work performed

Acceptance Criteria

Each authorized task under CLIN 0006 shall be considered complete when ABMC confirms in writing that the following conditions are met:

1. Functional Operation: The implemented configuration, workflow, or integration functions as described in the approved task authorization.
2. Access Controls: User access and permissions operate according to ABMC security and governance requirements.
3. Documentation: System documentation is updated to reflect the implemented configuration changes.
4. Validation: ABMC personnel have reviewed and confirmed that the requested capability operates as intended.

CLIN 0007-Operations and Maintenance

CLIN 0007 provides ongoing operations and maintenance (O&M) support for the Freshworks platform implemented under CLINs 0002 through 0004 and licensed under CLIN 0001. Contractor shall assist ABMC in maintaining the platform in an operational, stable, and secure condition and support day-to-day administration of the system.

Support shall be provided during standard business hours unless otherwise coordinated with ABMC. Contractor shall respond to support requests based on the following priority targets:

• Priority 1 (P1-Critical System Issue): Platform unavailable or critical functionality impaired. Initial response within 1 hour.
• Priority 2 (P2-High Impact Issue): Major feature or workflow degraded but system operational. Initial response within 4 business hours.
• Priority 3 (P3-Routine Request or Issue): Minor issue, configuration question, or administrative request. Initial response within 1 business day.

Services under this CLIN include routine system administration and operational support, including:

• Break/fix troubleshooting for platform configuration or workflow issues.
• Minor workflow adjustments within existing processes.
• Updates to email templates, notifications, or knowledge templates.
• Minor report and dashboard adjustments.
• Administrative assistance with user roles, queues, and configuration questions.
• Monitoring of platform performance and coordination with Freshworks technical support when required.

This CLIN does not include development of major new workflows, onboarding of new departments, or implementation of new channels or integrations. Those activities shall be performed under CLIN 0006 when authorized.

Contractor shall also conduct a simple monthly service review with ABMC that summarizes platform operations and identifies improvement opportunities. At a minimum, the review shall include:

• Ticket volume by queue or department.
• SLA performance metrics.
• Current backlog and aging tickets.
• Top request categories or recurring issues.
• A short list of recommended improvements or optimizations.

These reviews are intended to maintain operational visibility, support continuous improvement, and ensure the platform continues to meet ABMC operational needs.

Scope

1. Platform Administration Support: Contractor shall provide administrative support for the Freshworks platform. This support may include monitoring system operation, assisting with license administration, adjusting user roles and permissions, updating service level policies or business hours, maintaining notification templates, and making minor configuration adjustments within existing workflows.
2. System Issue Support: Contractor shall assist ABMC in troubleshooting issues related to system configuration or platform behavior. Contractor shall coordinate with Freshworks support when necessary and track issue resolution activities.
3. Minor Configuration Updates: Contractor may perform limited configuration changes that do not alter the overall system design. Examples may include updating request forms, adjusting routing rules, modifying dashboards, or updating service level thresholds.
4. Platform Release Monitoring: Contractor shall monitor platform updates released by Freshworks and review any potential impact on ABMC configurations. When significant changes occur, Contractor shall inform ABMC and assist in validating that system functionality remains operational.
5. Reporting Support: Contractor shall maintain operational dashboards and assist ABMC in reviewing system usage, request volumes, and other operational metrics as needed.
6. Security and Compliance Support: Contractor shall assist ABMC in maintaining identity integration and access controls within the system. Contractor may also assist with retrieving system information needed for internal reviews or audits.
7. Administrative Guidance: Contractor shall provide guidance to ABMC administrators regarding system operation and recommended configuration practices. Contractor may conduct periodic review sessions to discuss system performance or configuration improvements.

Service Support

Contractor shall provide support during standard business hours unless otherwise specified. Contractor shall establish procedures for submitting support requests and identifying escalation contacts when issues require additional attention.

Period of Performance

CLIN 0007 shall provide operations and maintenance support for the following periods:

• Base Year
• Option Year 1
• Option Year 2
• Option Year 3
• Option Year 4

Deliverables

Contractor shall provide the following deliverables during each performance year:

• An operations and maintenance support plan
• Periodic summary reports describing support activities and system status
• Updated system administration documentation when configuration changes occur
• Issue tracking records for platform support activities
• An annual summary describing overall platform status and recommended improvements

SECTION 3: KEY PERSONNEL

Contractor shall designate Key Personnel critical to the successful execution of this project. Please note:

- All Key Personnel must be favorably adjudicated for ABMC Tier 1 suitability or clearance eligibility within two (2) weeks of project kickoff. Failure to achieve favorable adjudication within this timeframe may result in removal from the project at no cost to the Government.
- If, upon contract award, Contractor cannot provide Key Personnel who meet the suitability requirements, ABMC may require replacement personnel and may pursue contractual remedies, up to and including termination, consistent with the terms of the contract.
- Contractor shall ensure that no personnel are assigned to perform work on ABMC systems or networks until adjudication is complete and written authorization is granted by the ABMC Security Office.
- All contractor personnel performing work under this contract must comply with FAR 52.203-13, FAR 52.204-2, and applicable suitability requirements for access to federal information systems.
- Key Personnel shall possess demonstrated experience implementing Freshservice and Freshworks enterprise service management solutions, including ITSM process configuration, integrations, data migration, reporting, and secure administration in federal or comparable environments.
- All Key Personnel performing configuration work shall be U.S.-based due to access to sensitive tenant configurations and CUI.
- Key Personnel shall be able to commence work within two (2) weeks of project kickoff.
- All designated Key Personnel shall be submitted to ABMC for review and written approval with Contractor's proposal submission. ABMC will provide instructions for Contractor to submit Key Personnel's Personally Identifiable Information.
- Substitutions of Key Personnel shall be made only with prior written consent from the Contracting Officer.

SECTION 4: PROPOSAL FORMAT

Contractors shall submit proposals organized according to the sections below. Proposals shall be clear, concise, and limited to information directly relevant to the evaluation criteria. Marketing materials that do not address the requirements should not be included.

Volume I-Technical Proposal

- Section 1-Executive Summary & Company Information: Provide a brief summary of the proposed solution, including the Freshworks products offered, the overall implementation approach, and key differentiators of the Contractor's approach.

  • Company name, address, and Unique Entity Identifier (UEI)
  • Contract vehicles through which the solution may be purchased (if applicable)
  • Confirmation of ability to meet contract requirements
  • Any assumptions or dependencies associated with the proposal.

- Section 2-Technical Approach: Describe how the proposed solution will meet the requirements of the Performance Work Statement. The response shall address:

  • Proposed Freshworks product editions, modules, and licensing structure
  • Approach for implementing ITSM and case management workflows
  • Integration with Microsoft Entra ID, Single Sign-On, and other required services
  • Data migration approach from the existing system
  • Workflow configuration and reporting approach
  • Security, access control, and compliance considerations

- Section 3-Implementation Methodology: Describe the implementation plan for CLINs 0001 through 0004. Include:

  • Project management approach
  • Implementation phases and schedule
  • Data migration strategy
  • Testing and validation approach
  • Training and deployment support

- Section 4-Operations and Maintenance Approach: Describe the approach for providing operations and maintenance support under CLIN 0007, including administration support, troubleshooting procedures, and coordination with the software manufacturer.

- Section 5-Corporate Experience and Past Performance: Provide descriptions of at least three projects performed within the last five years that are similar in scope and complexity. Include the customer name, project description, period of performance, and customer point of contact if available.

- Section 6-Key Personnel: Identify the proposed named key personnel and summarize their relevant qualifications and experience.

Volume II-Price Proposal

Contractors shall provide a detailed pricing proposal organized by CLIN. The price proposal shall include:

- Software licensing costs for CLINs 0001-0004, including for the base year and option years
- Optional licensing costs for CLIN 0005 (Freddy AI) for the base year and option years
- Implementation services pricing for CLINs 0002 through 0004
- Operations and maintenance pricing for CLIN 0007 for the base year and option years

Pricing shall clearly identify all costs associated with the proposed solution.

Evaluation Criteria

Proposals will be evaluated using a best value tradeoff approach. Award will be made to the Contractor whose proposal provides the best overall value to ABMC considering technical merit, experience, and price.

Technical Approach-Most Important
ABMC will evaluate the Contractor's understanding of the requirements and the suitability of the proposed solution. Evaluation will consider how well the proposed platform supports IT service management and case management workflows, integration with existing identity and collaboration services, and the overall soundness and feasibility of the proposed technical approach.

Implementation Approach and Project Management-Very Important
ABMC will evaluate the Contractor's implementation methodology and project management approach. Evaluation will consider the proposed implementation schedule, migration approach, testing and deployment strategy, and the Contractor's ability to manage project risks and coordinate implementation activities.

Corporate Experience and Past Performance-Important
ABMC will evaluate the Contractor's experience implementing similar enterprise service management or case management platforms. Evaluation will consider the relevance of prior projects and the Contractor's demonstrated ability to successfully deliver comparable solutions.

Price
Price will be evaluated for completeness, reasonableness, and consistency with the proposed solution. While price is an important consideration, ABMC may select a proposal that is not the lowest priced if it determines that the proposal provides greater overall value based on the evaluation factors above.

SECTION 5: GENERAL INFORMATION

Key Requirements

1. All work shall be performed remotely using ABMC-approved collaboration tools.
2. No changes to production systems shall occur without ABMC Change Control Board authorization.
3. ABMC data shall be stored and processed only within the Freshworks cloud environment authorized for this contract and in accordance with the vendor's contracted hosting region, security controls, and applicable federal requirements. Contractor shall not export, copy, or store ABMC data outside the authorized environments except as explicitly approved in writing by the Contracting Officer.
4. Contractor shall not run automated scripts, bulk permission changes, or apply third-party tools without ABMC's written approval.
5. When Contractor access to ABMC systems (such as Microsoft 365, Entra ID, endpoints, networks, or other ABMC-managed services) is required, Contractor shall request remote administrative access only through ABMC-approved secure methods. This requirement does not replace the standard administrative access model for the Freshworks SaaS platform itself. All remote access sessions to ABMC systems may be monitored or terminated by ABMC.
6. Contractor shall not store or reuse ABMC training recordings or user data outside ABMC-approved environments, including the Freshworks environment authorized under this contract, except as explicitly approved in writing by the Contracting Officer.

Controls and Change Management

The project will follow ABMC's formal change control process. Any modification to scope, cost, or schedule shall be proposed in writing and approved by the Contracting Officer (CO) prior to implementation. Weekly status meetings will document progress and identify emerging risks or dependencies.

Payment Schedule

Payment will be made on a firm-fixed-price (FFP) basis for CLINs 0001 through 0005 and 0007, subject to ABMC acceptance. CLIN 0001 subscription licensing shall be invoiced and paid in accordance with the contract schedule for the applicable subscription period. CLINs 0002 through 0004 and any exercised CLIN 0005 shall be invoiced upon completion and ABMC acceptance of the deliverables for that CLIN. CLIN 0007 shall be invoiced and paid in accordance with the contract schedule for the applicable performance period, subject to ABMC acceptance of required O&M deliverables. All invoices must comply with FAR Part 32 and be submitted through ABMC's designated invoicing system.

ABMC may withhold up to ten percent (10%) of the firm-fixed-price value for CLINs 0002 through 0004 and any exercised CLIN 0005 and CLIN 0007 until the ABMC accepts the deliverables for that CLIN. No withhold shall apply to subscription licensing under CLIN 0001.

Post-Award Meetings

Contractor shall coordinate with ABMC's CO and COR to schedule and conduct a Kick-off Meeting within five (5) business days after contract award. Subsequent project review meetings shall occur at intervals mutually agreed upon by Contractor and the COR.

Project Start Date & Kick Off

The contract's performance period begins on the contract award date. Kick-off shall be completed within five (5) business days of contract award.

Language Requirements

Contractor shall conduct all verbal and written communications with ABMC in English.

Section 508 Requirements

All training materials and deliverables must comply with Section 508 accessibility requirements.

Holidays and Work Hours

Contractor shall plan all site activities around ABMC staff availability and holiday blackout periods. Project schedule shall account for schedule constraints:

- **ABMC Offices (Arlington & Paris)**

ABMC observes U.S. Federal and local host nation's (e.g., French, Philippines, etc.) national holidays. If a holiday falls on a Saturday, ABMC will observe the holiday on the preceding Friday. If the holiday falls on a Sunday, ABMC will observe it on the following Monday.

- A list of official U.S. Federal holidays is available at: https://www.opm.gov/policy-data-oversight/pay-leave/federal-holidays/

Meetings shall be coordinated with ABMC and generally scheduled between 0800 and 1000 Eastern Time, subject to mutual availability and overseas time zones. Contractor shall account for these availability restrictions when developing the detailed project implementation schedule and milestones. ABMC will confirm specific unavailable dates at the project kickoff meeting and subsequent project meetings. Contractor shall adjust work schedules accordingly to avoid delays.

Appendix A: Estimated Breakdown of Workflows by Site

#	Region/Location Code	Site Name	Visitor Center	Estimated Workflows Needed
1	Overseas Office (OO)	Paris Office	No	Admin Reception
2	BRAC	Brittany American Cemetery	No	Site Email
3	AMAC	Aisne-Marne American Cemetery	No	Site Email
4	EPAC	Epinal American Cemetery	No	Site Email
5	LOAC	Lorraine American Cemetery	No	Site Email
6	MAAC	Meuse-Argonne American Cemetery	**Yes**	Site Email
7	NOAC	Normandy American Cemetery	**Yes**	Site Email
8	OAAC	Oise-Aisne American Cemetery	**Yes**	Site Email
9	PDH	Pointe du Hoc Ranger Monument	No	Site Email
10	RHAC	Rhone American Cemetery	No	Site Email
11	SMAC	Saint-Mihiel American Cemetery	No	Site Email
12	SOAC	Somme American Cemetery	No	Site Email
13	SUAC	Suresnes American Cemetery	No	Site Email
14	CTAM	Château Thierry American Cemetery	**Yes**	Site Email
15	LEMC	Lafayette Escadrille Monument Cemetery	No	Site Email
16	HCAC	Henri-Chapelle American Cemetery	**Yes**	Site Email
17	ARAC	Ardennes American Cemetery	No	Site Email
18	FFAC	Flanders-Fields American Cemetery	**Yes**	Site Email
19	SRAC	Sicily Rome American Cemetery	Yes	Site Email
20	FLAC	Florence American Cemetery	No	Site Email
21	LXAC	Luxembourg American Cemetery	No	Site Email
22	NEAC	Netherlands American Cemetery	**Yes**	Site Email
23	MNAC	Manila American Cemetery	**Yes**	Site Email
24	CLAC	Clark Veterans Cemetery	No	Site Email
25	CAAC	Cambridge American Cemetery	**Yes**	Site Email
26	BKAC	Brookwood American Cemetery	No	Site Email
27	NAAC	North Africa American Cemetery	**Yes**	Site Email
28	CZAC	Corozal American Cemetery	**Yes**	Site Email
29	MXAC	Mexico City US National Cemetery	No	Site Email
30	HQ	Arlington Washington DC Headquarters	No	1. WWII Registry 2. Info@abmc.gov 3. Collections@abmc.gov 4. Public Affairs 5. ITServiceDesk@abmc.gov 6. Historical Services 7. Human Resources