

Performance Work Statement (PWS)

HUD Unified Grants Systems - Recipient Analytics Platform | HUGS-RAP

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DRAFT

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Performance Work Statement (PWS)

HUD Unified Grants Systems – Recipient Analytics Platform

Vision Statement

The vision of this requirement is to deploy and configure an AI-powered Grant Intelligence platform to modernize and enhance HUD grant management and oversight, providing comprehensive insights, fraud detection, and compliance automation; with the same or more capabilities achieved during the 2026 HUGs Analytics pilot.

1 General Information

1.1 Scope of Work

The contractor will provide software capable of analyzing structured and unstructured grants data and software support to Housing and Urban Development's (HUD), capable of replicating and exceeding the results from the 2026 HUGs Analytics pilot. HUD conducted a pilot from January 2026 to April 2026 to evaluate a new automated grants payments compliance monitoring process across two program offices. The pilot demonstrated the ability to reduce manual reconciliation effort, improve data accuracy and assist with identifying fraud, waste and abuse.

This initiative builds on the methodology and outputs from the recent January 2026 “HUGS Analytics” pilot. The purpose of this requirement is to operationalize and scale the validated pilot outcomes across HUD’s grants programs.

The contractor shall:

- Platform Deployment & Integration for Disaster Recovery Programs [Base Tasks]
- Key Capabilities Configuration for Disaster Recovery Programs [Base Tasks]
- User Support & Continuous Improvement - All Grant Programs [Base & Optional Tasks]
- Extend Deployment & Integration - Other Grant Programs [Optional Tasks]
- Extend Capabilities & Configuration - Other Grant Programs [Optional Tasks]

Detailed descriptions of specific tasks are provided in Section 5 – Specific Tasks.

1.2 Background

HUD seeks to modernize its financial and grants management systems to improve efficiency, data quality, compliance, and user experience. This effort includes designing and building new systems and microservices that can better support enterprise functions, reporting requirements, and integration with external systems.

HUG Analytics Pilot Background:

Pilot Overview:

HUD completed a three-month pilot to test the feasibility of implementing a Recipient Portal. During the pilot approximately 1,300 evidence packages containing invoices, payroll reports, receipts, checks, approvals, etc. were successfully analyzed, joined with internal and external data sources and aligned to grant expenditures/drawdowns. This resulted in an unified view of grants, vouchers, recipients/sub-recipients and spend across programs, and provided HUD with a new, centralized data analysis that allows faster analysis of spending patterns and supports early detection of potential fraud, waste, and abuse. This new data analysis will allow HUD to identify and address areas of concern and generate informed action plans, ensuring that funds are efficiently and effectively deployed.

HUD completed a three-month pilot to test the feasibility of implementing a Recipient Portal and associated analytics capability. During the pilot, approximately 1,300 evidence packages—including invoices, payroll reports, receipts, checks, and approvals—were ingested and analyzed. These materials were linked to grant expenditures and drawdowns and integrated with internal HUD financial and program data as well as select external data sources. The pilot demonstrated the ability to transform unstructured and semi-structured documentation into structured analytical data aligned with awards, vouchers, recipients, and sub-recipients.

Through this process, HUD established a unified analytical environment that connected supporting documentation, grant transactions, and related contextual data into a single operational view. The pilot demonstrated the feasibility of rapidly integrating newly submitted evidence with historical financial and entity data to support cross-program analysis. This capability enables analysts to trace spending from obligation through disbursement and supporting documentation, identify patterns across recipients and programs, and surface anomalies or indicators of non-compliance, potential fraud, waste, or abuse.

The pilot also validated the value of a scalable platform capable of ingesting heterogeneous data sources—including structured financial data and unstructured documentary evidence—and transforming them into a searchable, linkable, and analyzable dataset. Demonstrated capabilities included automated document processing, entity resolution across disparate systems, relationship analysis across datasets, scalable data integration pipelines, and interactive analytical tools that allow analysts and program staff to explore connections among entities, transactions, and evidence artifacts.

Building on the pilot, HUD seeks to implement a scalable analytics capability that can ingest evidence submitted through the Recipient Portal, integrate that information with HUD financial and program data, and provide advanced analytical tools for monitoring recipient activity across programs. This capability will support continuous monitoring of financial assistance spending, early identification of risk indicators, and data-driven oversight of HUD's financial assistance portfolio.

Pilot Performance Results:

Metric	Pilot Result	Target for Implementation
# of Grant Programs	4	63
# of artifacts	1600	~2M-5M
# of data sources/systems (within HUD)	5	10+
# of data sources (outside HUD)	4	20+
Average processing volume per month	~8-16GB	~12.5 – 50TB
# of days to 1 st functional prototype	30 days	30 days

1.3 Constraints

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

44 USC §3541 et seq. Federal Information Security Management Act (FISMA, supersedes the Computer Security Act of 1987) <http://www.gpo.gov/FISMA>

44 USC §3601 et seq. E-Government Act of 2002 <http://www.gpo.gov/fdsys/pkg/USCODE-2010-title44/pdf/USCODE-2010-title44-chap36.pdf>

Chief Financial Officer's Act of 1990

The Chief Financial Officer's Act of 1990.

Office of Federal Financial Management Federal Financial Management Improvement Act (FFMIA) of 1996

H.R.4319 - 104th Congress (1995-1996): FFMIA Act of 1996

Federal Financial Management Systems Requirements (Department of the Treasury)

<https://tfx.treasury.gov/sites/default/files/pdfs/ffmsr.pdf>

Federal Managers Financial Integrity Act of 1982 (FMFIA)

https://www.whitehouse.gov/omb/financial_fmfi1982

GAO/AIMD-00-33 Information Security Risk Assessment Practices of Leading Organizations <http://www.gao.gov/assets/200/199976.pdf>

HSPD-12 Policy for a Common Identification Standard for Federal Employees and Contractor's, Homeland Security Presidential Directive-12
<http://www.dhs.gov/homeland-security-presidential-directive-12>

HUD's Financial Systems Databases
<http://hudatwork.hud.gov/HUD/haw/Systems>

HUD Handbook 2400.25, REV 4.2; Information Technology Security Policy
[Information Technology Security Policy 2400.25 \(HUD Portal\)](#)

HUD Handbook 3255.1 Enterprise Architecture Policy <http://portal.hud.gov/hudportal/documents/huddoc?id=32551CIOH.pdf>

HUD Handbook 3410.1 HUD Policy For IT Project Planning and Management (PPM) <http://portal.hud.gov/hudportal/documents/huddoc?id=34101CIOH.pdf>

HUD Project Planning and Management (PPM) HUD Project Planning and Management (PPM) Site: Project Type Guides, Tools and Artifact
http://portal.hud.gov/hudportal/HUD?src=/program_offices/cio/ppm/PPMV20HOME

HUD Project Planning and Management (PPM) HUD Enterprise Architecture Program
http://portal.hud.gov/hudportal/HUD?src=/program_offices/cio/ea/newea

IEEE 1012-2012 IEEE Standard for System and Software Verification and Validation
<http://standards.ieee.org/findstds/standard/1012-2012.html>

IEEE 1016-2009 IEEE Standard for Information Technology--Systems Design--Software Design Descriptions
<http://standards.ieee.org/findstds/standard/1016-2009.html>

IEEE 12207-2008 Systems and software engineering -- Software life cycle processes
<http://standards.ieee.org/findstds/standard/12207-2008.html>

IEEE 15288-2015 ISO/IEC/IEEE International Standard - Systems and software engineering -- System life cycle processes <http://standards.ieee.org/findstds/standard/15288-2015.html>

IEEE 16326-2009 ISO/IEC/IEEE International Standard Systems and Software Engineering-- Life Cycle Processes--Project Management <http://standards.ieee.org/findstds/standard/16326-2009.html>

IEEE 23026-2015 ISO/IEC/IEEE International Standard - Systems and software engineering - Engineering and management of websites for systems, software, and services information <http://standards.ieee.org/findstds/standard/23026-2015.html>

IEEE 29148-2011 Systems and software engineering -- Life cycle processes --Requirements engineering <http://standards.ieee.org/findstds/standard/29148-2011.html>

IEEE 42010-2007 ISO/IEC Standard for Systems and Software Engineering - Recommended Practice for Architectural Description of Software-Intensive Systems <http://standards.ieee.org/findstds/standard/42010-2007.html>

IEEE 730-2014
IEEE Standard for Software Quality Assurance Processes <http://standards.ieee.org/findstds/standard/730-2014.html>

IEEE 828-2012
IEEE Standard for Configuration Management in Systems and Software Engineering <http://standards.ieee.org/findstds/standard/828-2012.html>

IEEE 830-1998
IEEE Recommended Practice for Software Requirements Specifications <http://standards.ieee.org/findstds/standard/830-1998.html>

NIST Draft Special Publication 800-82, Series
Guide to Industrial Control Systems (ICS) Security
[NIST 800-82](#)

NIST Publication
FIPS 140-2S Security Requirements for Cryptographic Modules
<http://csrc.nist.gov/groups/STM/cmvp/standards.html#02>

NIST Special Publication 800-100, Series
Information Security Handbook: A Guide for Managers
<http://csrc.nist.gov/publications/PubsSPs.html>

NIST Special Publication 800-12, Series

An Introduction to Computer Security: The NIST Handbook

<http://csrc.nist.gov/publications/PubsSPs.html>

NIST Special Publication 800-14, Series

Generally Accepted Principles and Practices for Securing Information Technology Systems

<https://csrc.nist.gov/pubs/sp/800/14/final>

NIST Special Publication 800-18, Series

Guide for Developing Security Plans for Federal Information Systems

<http://csrc.nist.gov/publications/PubsSPs.html>

NIST Special Publication 800-30, Series

Guide for Conducting Risk Assessments

<http://csrc.nist.gov/publications/PubsSPs.html>

NIST Special Publication 800-34, Series

Contingency Planning Guide for Information Technology Systems

<http://csrc.nist.gov/publications/PubsSPs.html>

NIST Special Publication 800-35, Series

Guide to Information Technology Security Services

<http://csrc.nist.gov/publications/PubsSPs.html>

NIST Special Publication 800-37, Series

Guide for the Security Certification and Accreditation of Federal Information Systems

<http://csrc.nist.gov/publications/PubsSPs.html>

NIST Special Publication 800-47, Series

Security Guide for Interconnecting Information Technology Systems

<http://csrc.nist.gov/publications/PubsSPs.html>

NIST Special Publication 800-53, Series

Security and Privacy Controls for Federal Information Systems and Organizations

<http://csrc.nist.gov/publications/PubsSPs.html>

NIST Special Publication 800-53A, Series

Guide for Assessing the Security Controls in Federal Information Systems and Organizations

<http://csrc.nist.gov/publications/PubsSPs.html>

NIST Special Publication 800-55, Series

Performance Measurement Guide for Information Security

<http://csrc.nist.gov/publications/PubsSPs.html>

NIST Special Publication 800-60, Series

Guide for Mapping Types of Information and Information Systems to Security Categories

(Appendices) <http://csrc.nist.gov/publications/PubsSPs.html>

NIST Special Publication 800-84, Series

Guide to Test, Training and Exercise Programs for IT Plans and Capabilities

<http://csrc.nist.gov/publications/PubsSPs.html>

OMB Circular No A-123, Appendix D

https://www.whitehouse.gov/wp-content/uploads/2022/12/M_23-06-Appendix-D_final.pdf

OMB Circular A-130

<https://www.cio.gov/policies-and-priorities/circular-a-130/>

OMB Circular A-133

Security of Federal Automated Information Resources (Appendix III) (see also 34 FR 6428)

https://obamawhitehouse.archives.gov/sites/default/files/omb/assets/OMB/circulars/a133_compliance/2016/pt1.pdf

OMB Memorandum 06-15

Safeguarding Personally identifiable Information

<https://obamawhitehouse.archives.gov/sites/default/files/omb/assets/omb/memoranda/fy2006/m06-15.pdf>

OMB Memorandum 06-16

Protection of Sensitive Agency Information

<https://obamawhitehouse.archives.gov/sites/default/files/omb/assets/omb/memoranda/fy2006/m06-16.pdf>

OMB Memorandum 06-19

Reporting Incidents Involving PII

<https://obamawhitehouse.archives.gov/sites/default/files/omb/assets/omb/memoranda/fy2006/m06-19.pdf>

OMB Memorandum 99-20

Security of Federal Automated Information Resources

https://obamawhitehouse.archives.gov/omb/memoranda_m99-20/

PDD-63

Critical Infrastructure Protection,” Presidential Decision Directive-63

<http://fas.org/irp/offdocs/pdd/pdd-63.htm>

Pub. L. 104-106, 40 USC §1401 et seq.

Information Technology Management Reform Act of 1996 (Clinger-Cohen Act)

<http://www.gpo.gov/fdsys/pkg/USCODE-1998-title40/pdf/USCODE-1998-title40-chap25.pdf>

Pub. L. 113-101, 31 USC §3716(c)(6)

Digital and Transparency Act of 2014

<http://www.gpo.gov/fdsys/pkg/PLAW-113publ101/pdf/PLAW-113publ101.pdf>

Pub. L. 105-220, 29 USC 701 et seq.

Section 508 of the Rehabilitation Act of 1998

<http://www.gpo.gov/fdsys/pkg/PLAW-105publ220/pdf/PLAW-105publ220.pdf>

Pub. L. 105-277 (112 STAT. 2681-749-751), 44 USC §3504

Government Paperwork Elimination Act

<https://www.govinfo.gov/content/pkg/PLAW-105publ277/pdf/PLAW-105publ277.pdf>

NIST AI 100-I

Artificial Intelligence Risk Management Framework (AI RMF 1.0)

<https://nvlpubs.nist.gov/nistpubs/ai/NIST.AI.100-1.pdf>

The contractor shall not use HUD data, information or content obtain under this contract to train, fine-tune, or improve any contractor-owned or third -part artificial intelligence or machine learning models. HUD data shall only be used for the purpose of performing work under this contract.

Any AI models, configurations, or customizations developed using HUD data under this contract shall be HUD property. HUD retains all rights, title and interest in those HUD-specific models and outputs.

1.3.1 Project Planning and Management

All HUD IT projects, including all information systems acquired, developed, enhanced, or maintained shall follow the policy, procedures, standards, and guidelines set forth within the IT Management Framework using the Project Planning and Management (PPM) Life Cycle located at HUD’s PPM Life Cycle Website:

http://portal.hud.gov/hudportal/HUD?src=/program_offices/cio/ppm/PPMV20HOME

PPM was designed based on the best practices from Capability Maturity Model Integration (CMMI) for systems development and PMBok for project management. While at the foundation, PPM is designed as a Waterfall methodology, HUD encourages tailoring the PPM to use the many modern solution development methodologies available to enable the planning, development and delivery of useable functionality within 6-9 month increments.

Contractors are encouraged to propose a preferred methodology whether their solution(s) are for custom development, includes prototypes or pilots, Commercial Off the Shelf (COTS)/ Government Off the Shelf (GOTS) configuration, or Software as a Services. Working with the HUD Project Manager(s), the Contractor will tailor PPM to take advantage of contractor proposed expertise in using other methodologies in a manner that will provide HUD the best value and address all of the work necessary for successful project completion, on time, within budget, and delivering intended functionality.

The decisions of PPM tailoring are captured in the Project Tailoring Agreement (PTA), which documents the specific agreement for creating, combining, referring, or omitting specific artifacts applicable to the project, as well as adjust project control gate reviews to be consistent with the tailoring. All tailoring of PPM must be approved by HUD's Deputy Chief Information Officer (DCIO) for Business & IT Modernization. As a default, any project without an approved project tailoring agreement is required to follow all PPM phases and artifacts as presented.

1.4 Non-Personal Services

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

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

1.5 Period of Performance

The period of performance shall be for Base period of 12 months with three 12-month option periods.

1.6 Place of Performance

Work to be performed remotely.

1.7 Hours of Operation

The Contractor shall maintain an adequate workforce for the uninterrupted performance of all tasks defined within the contract when the Government facility is not closed for the above reasons. When hiring personnel, the Contractor shall keep in mind that the stability and continuity of the workforce is essential.

1.8 Special Qualifications

N/A

1.9 Post Award/Kickoff Conference

The Contractor shall attend any post award conference convened by the contracting activity or contract administration office in accordance with FAR Subpart 42.5 and HUD Acquisition Regulation (HUDAR) clause 2452.237-79 - Post Award Conference.

1.10 Status Meetings

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

1.11 Contractor Travel

Prior to travel, the Contractor shall coordinate with and receive Government authorization from the COR for all travel. Reimbursement of travel costs will be in accordance with the Federal Travel Regulation and in accordance with FAR 31.205-46.

1.12 Transition-In

N/A

1.13 Transition-Out

N/A

2 Definitions and Acronyms

2.1 Definitions

Business Day – Every official day of the week which are days between and including Monday to Friday. This does not include federal holidays and weekends.

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

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

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

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

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

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

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

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

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

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

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

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

2.2 Acronyms

AQL - Acceptable Quality Level

CO - Contracting Officer

COR – Contracting Officer’s Representative

DR – Disaster Recovery

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

HUGS – HUD Unified Grants System

POC - Point of Contact

QA - Quality Assurance

QASP - Quality Assurance Surveillance Plan

QCP - Quality Control Plan

3 Government-Furnished Property and Services

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

3.1 Government Services

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

3.2 Facilities

Facilities will not be provided

3.3 Equipment

The Government will provide laptop and/or Virtual Desktop Infrastructure (VDI); to accomplish work if needed.

3.4 Materials and Information

The Government will provide the following materials and information via HUD.gov email and SharePoint on an as-needed basis:

- Financial Interface connection documents
- HUD policy, procedures documents and handbooks
- Organizational charts
- Financial systems schematics
- Contractor assigned HUD.gov email

Copies of required materials will be provided to the Contractor in hard copy or soft copy within 15 days of contract award. All materials will remain the property of the Government and will be returned to the COR upon request or at the end of the contract period.

3.5 Quality Assurance (QA)

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

4 Contractor-Furnished Items and Services

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

4.1 Facilities

The Contractor shall furnish all facilities required to perform the services identified within the PWS.

4.2 Equipment

The Contractor shall furnish all equipment required to perform the services identified within the PWS.

4.3 Materials

The Contractor shall furnish all materials required to perform the services identified within the PWS.

4.4 Contractor Responsibilities

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

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

4.5 Contractor Personnel

See HUDAR clause 2452.237-70 - Key Personnel in the Key Personnel section of the contract.

4.6 Identification of Contractor Employees

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

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

5 Specific Tasks

The contractor will provide software capable of analyzing structured and unstructured grants data and software support to Housing and Urban Development's (HUD).

The contractor shall:

5.1 Pilot Replication Plan [Base Task]

- Develop and submit a Pilot Replication Plan that describes the approach for reproducing the validated outcomes achieved during the January 2026 “HUGS Analytics – Grants Intelligence” pilot, see 1.2 for background and scaling those outcomes to HUD’s production environment.
 - The Pilot Replication Plan shall describe, at a minimum:
 - The contractor’s approach to replicating the pilot outcomes, including the processes, technologies, staffing and methodologies that will be used.

- A description of how the contractor will reproduce the functional capabilities, workflows and performance outcomes demonstrated during the pilot.
- The implementation approach for transitioning the pilot capability into a production environment, including milestones, dependencies and resources requirements.
- A validation methodology describing how the contractor will demonstrate that pilot outcomes have been successfully replicated.
- A risk identification and mitigation strategy related to scaling the pilot outcomes to the enterprise environment.
- A proposed schedule with major milestones and deliverables associated with pilot activities.
- The Pilot Replication Plan shall be submitted no later than 30 days calendars after the kickoff meeting. Upon receipt of the COR's comments, the Contractor shall incorporate the comments and revisions and submit a final draft of the plan for approval no later than seven (7) calendar days after receipt of comments.

Performance Standards

- a) Standard: Draft Pilot Replication Plan delivered to the COR and PM no later than 30 calendar days after the kickoff meeting.

AQL: zero deviation

- b) Standard: Final Pilot Replication Plan delivered to the COR and PM no later than 60 calendar days after the kickoff meeting.

AQL: zero deviation

Deliverable:

A001 Pilot Replication Plan

5.2 Platform Deployment & Integration for Disaster Recovery Programs

[Base Task]

- Deploy software in a Federal Risk & Authorization Management Program (FedRAMP) accredited cloud environment to create a Grants Intelligence platform for monitoring and oversight of Disaster Recovery grant funds, with the same

functionality achieved during the January 2026 “HUGS Analytics – Grants Intelligence” pilot, see 1.2 for background.

- Integrate data through automated pipelines and APIs (as specified by HUD’s data and IT frameworks) from HUD data layers, including the Financial Data Mart (FDM), DRGR, Recipient/Sub-Recipient and Receipt/Evidence data, ensuring automated and continuous ingestion, updating, and synchronization of relevant data used for monitoring and oversight and
 - These following inter-agency sources/systems: Sam.gov – GSA, Federal Procurement Data System - GSA, Regulations – National Archives, Do Not Pay – Treasury / IRS / HHS / DOS / SSA, Income Verification - IRS, Federal Audit Clearinghouse – GSA and additional data as it becomes available and relevant to the configured workflows.
- Establish a Grant Intelligence System to prioritize recipient reporting analysis for disaster recovery funds, ensuring detailed understanding and tracking of the complete flow of funds. This system will standardize and integrate data on disaster recovery grants, agreements, recipients, sub-recipients, transactions, and obligations to provide comprehensive insights and enhance monitoring capabilities and enable traceability of funds from obligation through disbursement and associated supporting documentation and enable analysis of recipient activity across grants, sub-recipients, and vendors.
- Implement capabilities to reconcile and resolve entities appearing across multiple datasets (e.g., recipients, sub-recipients, vendors, individuals, and addresses) to create consolidated entity profiles that support cross-program analysis and oversight.
 - A fully configured functional mockup shall be submitted no later than 30 days calendars after the kickoff meeting. Upon receipt of the COR’s comments, the Contractor shall incorporate the comments and revisions and submit a final draft of the mockup for approval no later than seven (7) calendar days after receipt of comments.

Performance Standards

- c) Standard: Draft Grant Intelligence System for Disaster Recovery Grant Programs delivered to the COR and PM no later than 30 calendar days after the kickoff meeting.

AQL: zero deviation

- d) Standard: Final Grant Intelligence System for Disaster Recovery Grant Programs delivered to the COR and PM no later than 90 calendar days after the kickoff meeting.

AQL: zero deviation

Deliverable:

A002 Grant Intelligence System for DR Grant Programs

5.3 Key Capabilities & Configuration for Disaster Recovery Grant Programs [Base Task]

- **Grant Data & Interactive Contract Analysis:** Enable AI-powered querying, summarization and fusion of disparate data, with references to source documents. Ensure grant and recipient data is analyzed with intention to provide a complete and comprehensive flow of HUD disaster recovery grant funds and allow users to trace analytical outputs to the underlying transactions and supporting documentation.
- **Amendment & Clause Management:** Automate linking and comparison of amendments and clauses for improved organization and compliance tracking.
- **Data Extraction & Matching:** Extract and structure key data from disaster recovery grants, agreements, and receipts; enable invoice/receipt matching with awards and budgets. Automating the intake of receipts including Optical Character Recognition (OCR) to structure data.
- **Vendor Data & Network Analysis:** Configure workflows to compare recipient and sub-recipient activity to contract terms, map out vendor networks/hierarchies, detect compliance failures, and flag potential issues including identifying relationships among recipients, sub-recipients, vendors, and transactions across datasets.
- **Fraud Waste and Abuse (FWA) Detection & Automation:** Implement workflows to identify and investigate fraud, waste, and abuse (FWA), including grant compliance checks, price discrepancy detection, and automated financial reporting for disaster recovery grants. Leverage Machine Learning (ML) and Artificial Intelligence (AI) techniques to detect potential FWA.
- • Provide configurable workflows that allow HUD analysts to review flagged transactions or entities, document findings, track review status, and maintain investigative records.

A fully functional configured mockup shall be submitted no later than 30 days calendars after the kickoff meeting. Upon receipt of the COR's comments, the Contractor shall incorporate the comments and revisions and submit a final draft of the mockup for approval no later than seven (7) calendar days after receipt of comments.

Performance Standards

- a) Standard: Draft Grant Intelligence System configuration delivered no later than 30 calendar days after the kickoff meeting.

AQL: zero deviation

- b) Standard: Fully configured Grant Intelligence System delivered no later than 90 calendar days after the kickoff meeting.

AQL: zero deviation

Deliverable:

A003 Fully Configured Grant Intelligence System

5.4 Extend Deployment & Integration – Other Grant Programs [Optional Task]

- Extend the Grants Intelligence platform to support all six HUD grant-making program offices (PIH, CPD, PDR, FHEO, HSNG, OLHCHH).
- Integrate data (static or direct connections) from HUD identified data layer, which includes data from the Financial Data Mart (FDM), DRGR, Recipient/Sub-Recipient and Receipt/Evidence data, and
 - These following inter-agency sources/systems: Sam.gov – GSA, Federal Procurement Data System - GSA, Regulations – National Archives, Do Not Pay – Treasury / IRS / HHS / DOS / SSA, Income Verification - IRS, Federal Audit Clearinghouse – GSA and additional data as it becomes available and relevant to the configured workflows.
- Integrate additional program data as it becomes available and relevant to configured workflows.

Performance Standards

- a) Standard: Draft Grant Intelligence System for Other Grant Programs delivered to the COR and PM no later than 30 calendar days after contract award.

AQL: zero deviation

- b) Standard: Final Grant Intelligence System for Other Grant Programs delivered to the COR and PM no later than 90 calendar days after the contract award.

AQL: zero deviation

Deliverable:

5.5 Extend Capabilities and Configurations – Other Grant Programs [Optional Task]

- **Grant Data & Interactive Contract Analysis:** Extend the AI-powered querying, summarization and fusion of disparate data, with references to source documents to include all other grant programs. Ensure grant and recipient data is analyzed with intention to provide a complete and comprehensive flow of HUD grant funds, so that HUD has a comprehensive and complete picture of the financial operations of all its grant recipients.
- **Amendment & Clause Management:** Automate linking and comparison of amendments and clauses for improved organization and compliance tracking.
- **Data Extraction & Matching:** Extract and structure key data from the remaining grant programs, agreements, and receipts; enable invoice/receipt matching with awards and budgets. Automating the intake of receipts including Optical Character Recognition (OCR) to structure data.
- **Vendor Data & Network Analysis:** Further refine workflows to compare recipient and sub-recipient activity to contract terms, map out vendor networks/hierarchies, detect compliance failures, and flag potential issues.
- **Fraud Waste and Abuse (FWA) Detection & Automation:** Extend workflows to identify and investigate fraud, waste, and abuse (FWA), including grant compliance checks, price discrepancy detection, and automated financial reporting for all grant programs. Leverage Machine Language (ML) and Artificial Intelligence (AI) to detect potential FWA.

Performance Standards

- a) Standard: Draft Grant Intelligence System configuration delivered no later than 30 calendar days after the contract award.

AQL: zero deviation

- b) Standard: Fully configured Grant Intelligence System delivered no later than 90 calendar days after the contract award.

AQL: zero deviation

Deliverable:

5.6 User Support & Continuous Improvement [Base & Optional Task]

- Provide engineers to work alongside HUD Subject Matter Experts (SME) and end-users for configuration, feedback collection, and rapid iteration of platform features.
- Support HUD personnel (CFO, HSNG, PDR, OLHCHH, FEHO, PIH, CPD) in using the platform for monitoring and actioning grants.

6 Deliverables

The Contractor shall complete all work, deliver all deliverables, and adhere to all milestones as specified herein. Any prototypes, plans, etc. that the Contractor submits are drafts, not final copies. The Government reserves the right to make changes to delivery dates.

Number	Name	Frequency	Quantity
A001	Pilot Replication Plan	Twice	1
A002	Grant Intelligence System for DR Grant Programs	Twice	1
A003	Fully Configured Grant Intelligence System for DR Grant Programs	Twice	1
A004	Grant Intelligence System – Other Grant Programs	Twice	1
A005	Fully Configured Grant Intelligence System – Other Grant Programs	Twice	1

6.1 Quality Control Plan

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

The Contractor shall develop, maintain, enforce, and document a Quality Control Plan (QCP). The QCP shall ensure the Government receives a level of quality that is consistent with the

requirements specified in this contract. The QCP shall be sufficiently detailed to provide the Contractor's methodology for identifying and recruiting qualified personnel. The QCP shall also provide the Contractor's methodology for resolving problems identified by the Government during reviews conducted in accordance with its Quality Assurance Surveillance Plan (QASP).

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

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

The Contractor's QCP shall be delivered to the COR within 30 days after contract award (or with the Contractor's proposal if it is an evaluation factor). The QCP shall be submitted to the COR within  [insert number of days] business days when changes are made thereafter.

6.2 Acceptance Criteria

Each contract deliverable shall meet the following inspection and acceptance criteria in addition to any "*Inspection and Acceptance*" contract terms and conditions:

- Deliverables shall incorporate all HUD comments;
- All deliverables shall be provided to the designated COR first in draft format for review and comment unless specified otherwise by the COR;
- Subsequent final submissions shall incorporate the comments, changes, edits, and concerns expressed to the Contractor by the COR. All deliverables shall be fully functional, reflect comprehensive research, incorporate complete analysis, and address HUD concerns;
- Acceptance of all deliverables shall be provided in writing by the COR within 5 business days. Upon written notification by the COR, the Contractor shall make any required revisions and resubmit the documentation within 5 business days, and/or submit a final submission within two (2) business days. The COR will inform the Contractor of the final draft.
- The Contractor shall provide any further refinement needed for documents required by the COR;
- All deliverables must comply with Section 508 requirements as established by the Section 508 Access Board and other HUD guidelines; and
- In the event the Government deems a deliverable as unacceptable and the deliverable is rejected, the Contractor shall rework the deliverable at no cost increase to the contract. In the event the Government deems the services unacceptable and rejects the service, the Contractor shall act as necessary to correct deficiencies and bring the service into compliance with the acceptability standards of the contract.

7 Related Documents

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

8 Performance Requirements Summary

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

HUD will develop a Quality Assurance Surveillance Plan to be used to provide contract oversight. In conjunction with the Contractor's Quality Control Plan and various other methods of assessing performance, the COR and PM may perform on-site reviews and/or other types of verification to determine that the specified target performance requirements have been met. Regular review of Contractor performance is critical to the overall success of the contract. On a monthly basis, the COR will evaluate the quality of the product or services.

Performance Requirement Summary (PRS)

Statements	Standards/AQLs	Incentive/Remedy
5.1 Pilot Replication Plan	a. <u>Standard:</u> Draft Pilot Replication Plan delivered to the COR and PM no later than 30 calendar days after the kickoff meeting. <u>AQL: zero deviation</u> b. <u>Standard:</u> Final Pilot Replication Plan delivered to the COR and PM no later than 60 calendar days after the kickoff meeting. <u>AQL: zero deviation</u>	(a) If contractor fails to meet the AQL for other than unforeseeable circumstances, unfavorable comments will be documented on contractors past performance and utilization of other breach remedies will be taken.
5.2 Platform Deployment & Integration for Disaster Recovery Programs	a) <u>Standard:</u> Draft Grant Intelligence System for Disaster Recovery Grant Programs submitted to the COR and PM no later than 30 calendar days after the kickoff meeting. <u>AQL: zero deviation</u> b) <u>Standard:</u> Final Grant Intelligence System for Disaster Recovery Grant Programs submitted to the COR and PM no later than 90 calendar days after the kickoff meeting. <u>AQL: zero deviation</u>	(a) If contractor fails to meet the AQL for other than unforeseeable circumstances, unfavorable comments will be documented on contractors past performance and utilization of other breach remedies will be taken.
5.3 Key Capabilities & Configuration for Disaster Recovery Grant Programs	a) <u>Standard:</u> Draft Grant Intelligence System configuration delivered no later than 30 calendar days after the kickoff meeting. <u>AQL: zero deviation</u>	(a) If contractor fails to meet the AQL for other than unforeseeable circumstances, unfavorable comments will be documented on

	b) <u>Standard</u>: Fully configured Grant Intelligence System delivered no later than 90 calendar days after the kickoff meeting. <u>AQL: zero deviation</u>	contractors past performance and utilization of other breach remedies will be taken
5.4 Extend Deployment & Integration – Other Grant Programs	a. <u>Standard</u>: Draft Grant Intelligence System for Other Grant Programs delivered to the COR and PM no later than 30 calendar days after contract award. <u>AQL: zero deviation</u> b. <u>Standard</u>: Final Grant Intelligence System for Other Grant Programs delivered to the COR and PM no later than 90 calendar days after the contract award. <u>AQL: zero deviation</u>	(a) If contractor fails to meet the AQL for other than unforeseeable circumstances, unfavorable comments will be documented on contractors past performance and utilization of other breach remedies will be taken.
5.5 Extend Capabilities and Configurations – Other Grant Programs	a. <u>Standard</u>: Draft Grant Intelligence System configuration delivered no later than 30 calendar days after the contract award. <u>AQL: zero deviation</u> b. <u>Standard</u>: Fully configured Grant Intelligence System delivered no later than 90 calendar days after the contract award. <u>AQL: zero deviation</u>	(a) If contractor fails to meet the AQL for other than unforeseeable circumstances, unfavorable comments will be documented on contractors past performance and utilization of other breach remedies will be taken.