

IDESG, Inc.  
SUBJECT MATTER EXPERT SUBCONTRACTING  
OPERATING PROCEDURES

10-19-2014

1. The purpose of the SME component of the service contract framework is to obtain and provide expert resources, on a budgeted, project-by-project basis, for IDESG projects (such as draft reports, policy or analysis documents) that require support beyond that available from the volunteer member community, and are central to the development and implementation of IDESG's identity framework.
2. OASIS' performance of the project work is supervised by the IDESG Executive Director, the Plenary Chair, and the organization's officers. OASIS will meet with the Executive Director for coordination purposes weekly or biweekly, according to need.
3. OASIS is responsible for supervising and providing subject matter experts (SMEs) for each approved (by IDESG) project.
4. The IDESG process for requesting and obtaining SME support for a specific project follows:
  - 4a. Each written project request shall be provided by an IDESG Committee Chair to the Plenary Chair, with copies to the Executive Director and OASIS's Program Manager. Each request shall include: (1) the scope of the proposed project, (2) a brief description of its relevance to the identity framework, (3) an estimate of SME person hours required, including specific expertise (skills and level) desired (4) expected deliverables, (5) desired deadlines for completion and any intermediate approval steps, and (6) the names of the workgroup's participants or other stakeholders who are engaged in the development of the work (to materially contribute and/or provide review or input) to the project.
  - 4b. Each request: (1) will be reviewed by the Plenary Chair or Executive Director for alignment with current deliverable schedule, and (2) OASIS's project manager, who will respond (within 5 days of receipt of confirmation from the Plenary Chair or Executive Director) with any suggested corrections, requests for clarifications or limitations on feasibility and an estimated level of effort and cost. The request and OASIS's response will be reviewed by the IDESG plenary chair or (?). If The Plenary Chair shall issue a written reply (within [\_\_] days of receipt of OASIS's response), that assigns a priority to the project in light of the identity framework development plan, and an approved level of effort and not-to-exceed dollar amount for the requested support.

- 4c. Once such a project has been approved, OASIS shall prepare and circulate a statement of work and qualifications, to confirm mutual understanding of the work to be performed by OASIS and resources, if any, to be provided to the requesting committee, including the appropriate personnel/skill set.
- 4d. Experts engaged as SMEs in support of IDESG through OASIS must commit to act in a vendor-neutral capacity, and may not act as representatives of a specific entity or interest. Persons serving in voting or officer positions within IDESG or its workgroups are ineligible for simultaneously serving as an OASIS SME.
5. OASIS will monitor and supervise the expert's performance of that work, in consultation with the requesting Committee Chair, the Plenary Chair and the Executive Director. OASIS will review and perform quality control on SME performance and deliverables, and will regularly seek IDESG feedback on work quality. OASIS is responsible for the quality of the work and may, if they so determine, make personnel changes.
6. In the event that an approved project appears likely to go more than 15% over budget, or not be completed in the time originally projected, then OASIS will consult with the Plenary Chair and the Committee Chair, and the Executive Director regarding completion and disposition of the work. OASIS and the Plenary Chair and Executive Director will periodically review (and report to the leadership) the aggregate budget for SME expert resources and its projected utilization.
7. The primary responsibility for review and approval of the content and suitability of project deliverables rests with the Committee Chair. All materials supplied by OASIS in connection with approved SME projects is intended to be expert advisory information, which still requires the review and consultation of the IDESG community, beginning with the requesting Committee.
8. All OASIS representatives will provide their services and expertise for the benefit of IDESG and its stakeholder community, under appropriate permanent license grants or conveyances that permit open publication, and that fully and freely allow the re-use of all or any part thereof by IDESG.