

Veterans Benefits Administration
Transition Assistance Program
PERFORMANCE WORK STATEMENT

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A. GENERAL INFORMATION

1. Title of Project

Department of Veterans Affairs (VA) Transition Assistance Program (TAP)

2. Introduction

The Department of Veterans Affairs (VA), Veterans Benefits Administration (VBA), Office of Transition and Economic Impact (TEI) is seeking contractor services for support of the Military's Transition Assistance Program (TAP). TEI requires support with advancing the ongoing implementation; sustainment and enhancement of TAP to ensure Servicemembers and their families have the necessary tools and information to seamlessly transition into civilian life.

3. Background

Each day Servicemembers make the transition from the military to civilian life. To aid in that transition, in August 2011, President Obama directed the Department of Defense (DoD) and VA to lead a task force with the White House economic and domestic policy teams and other agencies to develop the first major redesign of TAP. At the direction of the President, the purpose of the redesigned TAP is to develop a new training and service delivery model to allow a Servicemember, which includes Active, Reserve, and Guard, regardless of their branch of Service, to depart "career ready". In addition to the Presidential Task Force efforts, Congress passed the Veterans Opportunity to Work to Hire Heroes Act (VOW Act 2011) which mandates all Servicemembers who are separating, retiring, or being released from a period of 180 days or more of continuous Active Duty must complete all mandatory requirements of the VOW Act, which includes pre-separation counseling to develop an Individual Transition Plan (ITP) with DoD and identify their career planning needs; attend the VA Benefits Briefings I and II to understand what VA benefits the Servicemember earned, how to apply for them, and leverage them for a positive economic outcome; and attend the Department of Labor Employment Workshop (DOLEW), which focuses on the mechanics of resume writing, networking, job search skills, interview skills, and labor market research.

To support the development of VA TAP career readiness programs, the Veterans Benefits Administration (VBA) TEI requires the assistance of subject matter experts (SMEs) with extensive experience in the development and implementation of education, skills and career training for transitioning employees. TEI requires a team that is capable of supporting and improving an existing model for transitioning Servicemembers, Veterans, and their families from the military to a productive civilian life. In order to reduce redundancy and improve coordination

of TAP, cross-agency collaboration occurs between VA, Department of Defense (DoD), Department of Labor (DoL), Department of Education (ED), and United States Coast Guard (USCG) representing the Department of Homeland Security (DHS), Small Business Administration (SBA), and the Office of Personnel Management (OPM). This includes maintaining an Memorandum of Understanding (MOU) between these organizations.

4. Purpose

The purpose of this contract is to provide TEI with support services to address VOW Act requirements, support continuous implementation of the interagency Veterans Employment Initiative (VEI) Task Force recommendations (ATTACHMENT A), the Transition Goals, Plans, Success (GPS) curriculum (ATTACHMENTS B, C and D), Capstone events and the Military Life Cycle (MLC) model.

The redesigned TAP includes the Transition GPS outcome-based curriculum which transforms the way the military prepares its Servicemembers transitioning to civilian life. Transition GPS is a rigorous pre-separation training curriculum for separating Servicemembers that is based on standard outcomes and learning objectives. The Transition GPS curriculum is designed to provide Servicemembers with skills-building training, resources and tools to ensure completion of essential tasks and competencies are met as required for a Servicemember to demonstrate career-readiness as they transition into Veteran status. The curriculum is composed of required core modules provided by the Military Services and partnering agencies, as well as three optional training tracks not required by the military services; Accessing Higher Education, Career Technical Training Track (CTTT), and the Entrepreneurship track. The VA contribution to the Transition GPS curriculum includes the mandatory VA Benefits I and II Briefings as well as the optional CTTT. VA Benefits Briefing I is designed introduce the Servicemember to the benefits which they may be eligible for, and VA Benefits II Briefing is designed to introduce and familiarize the Servicemember with the VA Health Care Portal, eBenefits, and assist in developing a plan for a successful transition using VA benefits. (ATTACHMENT E). VA will also continue to support Capstone and the Military Lifecycle (MLC) model. The Capstone ensures that the objectives of all transition activities have been met and that the Servicemember has a viable plan for transition to civilian life. The MLC transition model provides transition training throughout the military career.

5. Scope of Work

TEI requires support services to assist in continuation of TAP Administration and Program Management; Governance; Operations; Curriculum Development and Revision; Training; and Plans, Analysis, Evaluation. This support includes world-wide program sustainment in support of over 226,000 transitioning Servicemembers across more than 317 installations within the Continental United States (CONUS) and outside the Contiguous United States (OCONUS) annually (ATTACHMENT F). The contractor shall provide all personnel, equipment, supplies, facilities, transportation, tools, materials, supervision and other items and non-personal services necessary to support TAP operations as defined in this PWS except for those items specified as Government furnished property and services.

6. Performance Period

The period of performance will be for **twelve** months, and will have four twelve month option periods, for a total period of performance of five years. Work at Government sites shall not take place on Federal holidays or weekends unless directed by the Contracting Officer (CO) except that, the contractor will be required to support weekend classes and briefing outreach with COR approval.

7. Type of Contract

This contract is a hybrid Firm-Fixed Price and Time and Material contract.

8. Place of Performance

The work will be performed at, 1800 G Street NW, Washington, DC 20420, and/or any VA Facility within the District of Columbia; contractor's facilities (off-site), **DoD installations worldwide (ATTACHMENT F)** (please note these may require the administration of Status of Forces Agreements (SOFAs) as required by local labor regulations).

9. Recognized Holidays:

The Contractor is not required to perform services on Federal holidays. Any work to be performed at the Government site shall not take place on Federal holidays or weekends unless directed by the CO. There are ten (10) Federal holidays set by law (United States Code (USC) Title 5 Section 6103) that VA follows:

Under current definitions, four are set by date:

New Year's Day January 1

Independence Day July 4

Veterans Day November 11

Christmas Day December 25

If any of the above falls on a Saturday, then Friday shall be observed as a holiday. Similarly, if one falls on a Sunday, then Monday shall be observed as a holiday.

The other six are set by a day of the week and month:

Martin Luther King's Birthday Third Monday in January

Presidents' Day Third Monday in February

Memorial Day Last Monday in May

Labor Day First Monday in September

Columbus Day Second Monday in October

Thanksgiving Fourth Thursday in November

10. Hours of Operation

The Contractor is responsible for conducting business that meets the needs of the location where they are assigned. Usually this is an eight (8) hour day with 30 min for lunch, local time. The Contractor must generally be available 7:30 a.m.to 4:30 pm (local time) for weekly meetings and deliverables at each location. VA Benefits Advisor shall maintain walk-in availability. The Contractor must, at all times, maintain an adequate workforce for the uninterrupted performance of all tasks defined within this PWS.

11. Contract Award Meeting

The contractor shall not commence performance on the tasks in this PWS until the CO has conducted a kick off meeting within ten (10) days of contract award or has advised the contractor that a kick off meeting is waived.

12. Organizational Conflict of Interest Exclusion

The award of this contract will impose a potential Organizational Conflict of Interest (OCI) with the award of the independent verification and validation and performance management task order. Award of the verification and validation effort is anticipated to be as a task order under Agile

Delivery of VA Imminent Strategic and Operational Requirements (**ADVISOR**). Any contractor bidding on this TEEI requirement is precluded from supporting the verification and validation effort in any way, including but not limited to, advising, subcontracting, consulting, or proposing as noted by FAR 9.505-3. See the OCI clause in Section XXX for further information.

B. GENERAL REQUIREMENTS

For every task, the contractor shall identify in writing all necessary subtasks (if any), and associated price by task, together with associated sub-milestone dates. The contractor's subtask structure shall be reflected in the proposal and detailed project management plan (PMP).

All written deliverables shall be phrased in layperson language. Statistical and other technical terminology shall not be used without providing a glossary of terms.

Where a written milestone deliverable is required in draft form, TEI will complete its review of the draft deliverable within fifteen (15) calendar days from date of receipt. The contractor shall have ten (10) calendar days to deliver the final deliverable from date of receipt of the Government's comments.

All deliverables shall be delivered to the Contracting Officer Representative (COR) and Government Program Manager (PM).

The PM and COR shall attend all meetings and briefings where deliverables or the execution of this contract will be discussed. The PM and COR shall be included in all communication related to this PWS and the execution of the contract.

All contract communication and communication related to work completed toward this contract must occur on VA-approved email accounts.

All documents must be stored on VA Network or other location that has been expressly approved by the COR and Government PM.

For delivery of all work products and deliverables throughout the Period of Performance, Close of Business (COB) shall be understood to mean 5:00 pm ET.

All work products and deliverables shall, at a minimum, be 95% free of errors, specifically content, spelling, grammar, formatting, and punctuation.

All Contractor personnel shall complete, at a minimum, fingerprint submissions for security background checks before performing work.

C. SPECIFIC MANDATORY TASKS AND ASSOCIATED DELIVERABLES

The work described herein is divided into six task areas: TAP Administration and Program Management; Governance; Operations; Curriculum Development and Revision; Training; and Plans, Analysis, Evaluation.

TASK 1. Administration and Program Management (FFP)

Task 1: Part A. Project Management Plan (PMP)

The Contractor shall provide a updated detailed Project Management/Implementation Plan (PMP) (original is submitted as part of the proposal) and briefing for the project team, within fourteen (14) days of award, which presents the Contractor's plan for completing the contract describing the technical approach, management plan, organizational structure and resources, and management controls that will meet the objectives of this PWS. The contractor's plan shall be responsive to this PWS and describe, in further detail, the approach to be used for each aspect of the contract as defined in the proposal. The contractor shall keep the PMP up to date throughout the period of performance, specifically; the Contractor shall provide recommended updates in the form of tracked changes in Microsoft Word, on a monthly basis. Negative response indicating no updates are made is required. The Contractor shall use artifacts and processes determined at time of award. Further, the Government may, at any time, request additional updates that will be completed by the Contractor and delivered to the Government no more than ten (10) days after the request. These updates may include the addition of activities not included in the initial plan. For example, during the course of the major milestone implementation, the Government may require project changes that will require prior approval from the CO. Contractor shall provide recommended changes to PM, COR and CO. Any recommended changes that impact the price shall be identified with price impact and shall not be implemented until and unless approved by the CO through a modification.

The PMP is inclusive of the following deliverables, at a minimum:

- a. Staffing Plan:** The staffing plan is to define the roles and responsibilities for all personnel supporting the contract. The goal of the plan is to ensure the contract support staff is properly aligned to the strategic goals, mission, and objectives of TAP. Staffing plan should also include the Contractor's organizational structure in support of the

- contract. The Contractor shall provide a detailed hiring plan and tracking tool that shows status of hiring at all location including background checks, SOFA requirements, Personal Identification Verification (PIV) and start dates. The tracker shall include issues related to hiring and also be included on the Risk and Issues Matrix for mitigation. The Staffing Plan shall also demonstrate the Contractor's process for immediately identifying and taking appropriate remedial action in addressing Contractor personnel determined to be unacceptable in terms of technical competency or personal conduct in performance of contract activities. Contractor remedial actions shall be executed in a manner that does not disrupt or degrade the quality or timeliness of services. Only trained staff will be permitted to conduct Benefit Advisor activities and engage with transitioning Servicemembers and Veterans. All variations must receive prior approval from the PM and COR. The contractor will be required to create and maintain a staffing tracker.
- b. In-Processing Plan: Addresses in-processing of all personnel supporting this contract to include describing how to meet the learning needs of the Benefit Advisors and Train-the Trainers in the execution of TAP. The Contractor shall provide a tracking tool that shows status of in-processing and scheduled training.
 - c. Training Plan: The Contractor shall outline, as part of the proposal, how new hires will be trained. The Contractor shall complete initial training of staff members to include VA onboarding and badging within sixty (60) calendar days of award of the contract.
 - d. Operational Deployment Plan: Describe how contract personnel will be deployed to ensure little to no disruptions in the delivery of the VA mandated briefings as well as the plan to maintain operations throughout the course of the contract. Contractor shall provide weekly updates.
 - e. Contractor Communication Plan: Outlines the Contractor's roles and responsibilities of project participants in the review, approval and dissemination of information about key project processes, events, documents and milestones.
 - f. Risk Assessment and Mitigation Plan: The contractor shall conduct risk identification, risk analysis, risk management, and risk monitoring and reporting, focusing on the processes, resources and data sources critical to managing the project. The Contractor shall provide a Risks and Mitigation plan weekly. Risk and issues will be reported during the weekly update meetings as critical, high, medium, or low. A description shall be included of the risk/issue, the owner, progress made, and management strategy as applicable. Weekly status will be provided on each risk until they are closed out. The PMO may request that a perceived risk or issue be added and tracked for the contract.

- g. Quality Control Plan (QCP): The Contractor shall provide a detailed QCP. The QCP shall be reviewed quarterly and if there are any changes, the updated QCP shall be submitted to the PM and COR. The QCP shall document the overall approach to quality assurance activities. The QCP shall provide specifics regarding how the Contractor defines, implements, and assures quality during the contract life. The Contractor's QCP will be the basis for the Government's Quality Assurance Surveillance Plan (QASP). The QASP will be created upon receipt of the Contractor's first QCP and will be updated as the QCP is updated.
- h. Transition Plan: The Contractor shall submit a Transition Plan that describes the process, details, and schedule for providing an orderly transition during the Contract's Phase in/Phase out period in accordance with the PWS. The objectives of the Transition Plan are: to minimize the impacts on continuity of operations; maintain communication with staff and affected stakeholders; identify key issues; and overcome barriers to transition. The Contractor shall establish a transition management team capable of providing overall management and logistical support of all transition activities. The Contractor will regularly report status to the PM, COR and CO at periodic meetings and through regular written reports during the Transition period. The Transition Plan shall include the following:
- Inventory all Government Furnished Equipment (GFE) and Government Furnished Information (GFI) in Contractor possession,
 - Status of all deliverables, current issues, problems, or activities in process that require immediate action,

Deliverable 1.A.1 ***Project Management Plan (PMP)***

Staffing Plan, Organizational Structure

Weekly Hiring Plan and Tracker

TEI In-Processing and Training Plan

In-Processing and Training Plan Tracker

Operational Deployment Plan with weekly updates

Contractor Communications Plan

Risk Assessment and Mitigation Plan

Quality Control Plan (QCP)

Transition Plan

Task 1: Part B. Project Kickoff Briefing

The Contractor shall attend a project kick-off briefing with VA project team, and project advisory group comprised of key stakeholders and SMEs. The kick-off briefing will be held within ten (10) calendar days after contract award or as agreed upon between VA Government PM, COR, and Contractor. At the kick-off meeting, the Contractor shall brief the details of the project management plan (PMP), which shall include the Contractor's intended approach, work plan, and project schedule including deliverables, tasks, and subtasks, with major milestones.

Deliverable 1.B.1 ***Project Kickoff Briefing***

Task 1: Part C. Monthly Interim Progress Review & Smart book Report

1. Monthly Interim Progress Review (IPR): IPR activities will support the Government in implementing a disciplined, comprehensive, and flexible program and project management processes, including: monitoring of project metrics; rigorous risk management; and prompt reporting on Government-approved schedule, performance, and risk baseline.
2. Monthly Status Report (MSR): The Contractor will provide the (MSR) to the Government in a Smart book (SMT) format, electronically, no later than the 5th calendar day of each month. The SMT will cover all work completed during the preceding month and will present the work to be accomplished during the subsequent month. The SMT will identify any problems that have arisen and a statement explaining how the problem was resolved or an explanation why it has not been completely resolved.. Anticipated travel request shall be included as part of the Monthly IPR and SMT to include training for operational implementation. To support all Government approved travel requirements, the Contractor shall provide a pre-trip request at least fourteen (14) business days in advance. The contractor shall submit a post-trip report to the COR and PM within three (3) business days of trip completion. To support PWS requirements standard administrative tasks shall be completed by the Contractor (e.g., background investigation forms, staff roster, mandatory training) to obtain access to military installations, VA facilities or other places of performance. Benefit Advisors supporting this contract shall obtain a VA email address to use in support of all related PWS requirements.

The SMT shall be organized according to the PWS Tasks, and include, at a minimum, the following items:

- Any requirements stated in the PWS;
- Roster of personnel;
- Pending in-processing status for new personnel;
- Pre-trip request, detailing planned travel for the upcoming sixty (60) day period;
- Post trip reports;
- Submission of all information necessary to obtain VA email addresses for contract staff
- Planned replacements for the upcoming thirty (30) day period;
- Current expenditures and forecasted expenditures toward completion of the PoP;
- Identification of project risks;
- A summary of the tasks and work products completed;
- Planned training schedule;
- A status of all contract deliverables to include schedule of delivery; and
- Any other items requested by the Government, through the CO.

*Deliverable 1.C.1 **Monthly IPR Briefing***

*Deliverable 1.C.2 **Monthly Smart book Report***

Task 1: Part D. **Weekly Operations Meeting with Weekly Status Reports (WSR)**

The Contractor shall participate and facilitate weekly update meetings. Weekly meetings shall be set up after the kick-off meeting, considering availability of VA PMO staff, providing phone dial in and/or web conferencing. The weekly status report will highlight risks and issues as well as any outstanding items. The WSR shall be delivered via email to both the COR and PM. A summary shall be provided (2) business days prior to the meeting. The Contractor, PM and/or COR shall facilitate the meeting. The contractor will track action items, and provide minutes within (1) day of the meeting.

*Deliverable 1.D.1 **Weekly Operations Meeting, Status Report and Summary***

TASK 2. Governance (FFP)

Governance: In order to reduce redundancy and improve coordination of TAP, this area focuses on cross-agency collaboration between VA, DoD, DoL, ED, USCG, SBA, and OPM. TAP

governance is a two-tier leadership model comprised of the Executive Council (EC) and the Senior Steering Group (SSG) which reports to the EC. Interagency cooperation is at all levels of TAP to include performance reporting and management strategy supported by six interagency working groups (WGs). Each WG is led by two or three co-chair members representing DoD, VA and DoL respectively. The six standing TAP WGs are: Strategic Communications, Curriculum, Transition Policy, Performance Management, Data Sharing and IT Infrastructure.

The EC meets quarterly and the SSG meets monthly to provide strategic guidance and discuss recommendations or concerns to include: adopting standards for career readiness for transitioning Servicemembers, implementing revamped TAP curriculum, building business cases to share data, conducting joint assessments, engaging stakeholders and establishing long term priorities.

VA currently co-chairs the EC and the SSG with DoD and DoL. Membership to the EC and SSG is restricted to executive level personnel. The lead chair is rotated on an annual basis, with VA serving as the lead chair for the EC and SSG during fiscal year (FY) 2016, DoD FY17, DoL FY18, VA FY19 and DoD FY20. Monthly activities supporting governance include:

- Support VA involvement in interagency policy meetings such as the TAP interagency EC, SSG and interagency working groups related to Strategic Communications, Curriculum, Transition Policy, Performance Management, Data Sharing and IT Infrastructure. The contractor shall report meeting minutes and record and track due outs.
- Provide analysis and recommendations for policy improvement related to the TAP MLC, traditional TAP courses, including Benefits I and Benefits II, Entrepreneurship, CTTT, Education, and assist in analysis, evaluation, and the continuing improvement of the TAP Memorandum of Understanding (MOU) to ensure alignment with interagency TAP policies and guidelines.
- Support the drafting and coordination of congressionally directed actions, legislative referral memo, development of executive-level status reports, documentation, briefings to include preparing timely responses (emails, letters, etc.) to requests for information, communications from other federal agencies regarding TAP.
- Review, establish, maintain, and provide clear, consistent, and detailed schematics, directives, and standard operating procedures in support of TAP governance. The contractor shall identify redundancies, clarify, streamline and/or expand policies and procedures.

- **Change Control Process:** The Contractor shall assist the Government in the execution of the TAP change control process. The Government will work with the contractor to develop a change control process and form that complies with both Government and industry change control best practices. At a minimum, the form shall include three (3) sections. The first section shall include a Change Request (CR) number, submitter name, brief description of request, date original request was submitted, date required for deployment, priority, reason for change, and artifacts impacted. The second section shall include space for analysis and level of effort estimated by the Contractor. The third section shall include a Change Control Board (CCB) decision area. The decision area shall include: decision (approved, disapproved with conditions, and rejected) decision date, decision explanation, and conditions. The CR will be the trigger for starting the Change Control Process. The contractor shall facilitate change control artifacts and these shall be provided to the Government at the conclusion of the contract. A draft of the CR shall be provided within two (2) business days of a PMO request. The Contractor shall analyze and provide a level of effort, plan and recommend effective date within five (5) days from the date of draft submission. As a formalized process, change requests will be discussed and voted upon during weekly meetings in which the contractor shall participate as a PMO stakeholder. Governance Monthly Deliverables shall include at a minimum the following:
 - EC, SSG, and working group meeting minutes
 - Policy Analysis Report
 - Drafting and coordination of TAP congressional and legislative documents
 - Schematics, Directives and Standard Operating Procedures
 - Change Control Process, Form and Artifacts

Task 2: Part A. Task Deliverables

Deliverable 2.A.1 Governance Monthly Deliverables

TASK 3. Operations (FFP)

VA Support Concept: VA has analyzed Military-Service – provided data to generate geospatial demand and resource models for delivery of “VOW Act” requirements. VA support concept utilizes a regional hub-and-spoke model with regional command and control centers under the direction of TEI, providing command and control capabilities. The hub-and-spoke model involves a combination of permanent and itinerant (temporary/as-required) sites with support on

each installation based on demand. Installations with high- or medium-demand house a permanent VA presence and installations with low-demand are provided itinerant support activities as required, or send Servicemembers to nearby installations with permanent VA presence. VA currently supports 111 permanent and 206 itinerant sites, CONUS and OCONUS, divided into six (6) operational regions (ATTACHMENT F).

Onsite Activities: Addresses VOW Act requirements and support implementation of the VEI Task Force recommendations, including the GPS curriculum. The curriculum is composed of required core briefings provided by the Services, DoL, and VA, as well as three optional class modules detailing Education, Technical Training, and Entrepreneurship tracks. VA contribution to the Transition GPS curriculum will include the mandatory VA Benefits Briefings I, and II, as well as the optional CTTT. Group settings and locations may vary depending on attendance, but normally instruction will be given in a classroom, auditorium, or conference room environment conducive to learning. All classroom and event materials are provided by the Government. See ATTACHMENT F for historical frequency and event data.

Task 3: Part A. TAP Briefers (VA Benefits Advisor) Onsite Support

Individuals who provide onsite support shall be referred to as “VA Benefits Advisor (BA) – [contractor name]”. In many instances, the BA is the first or only interaction regarding VA benefits. Because of this, it is critical to the success of this contract that these individuals have the utmost professionalism, superior customer services practices and knowledge/expertise to ensure a positive experience.

All Advisors shall maintain a close network with other related resource experts, including but not limited to: Vocational Rehabilitation & Employment (VR&E) Counselors, Veterans Employment Service Office (VESO)/VA for Vets Advisors, DoL VETS Staff, DoL Instructors, TAP Managers, VA Overseas Military Services Coordinators (OMSC), VA Medical Centers and VA Regional Office staff. BA roles and responsibilities activities shall include:

- Provide all services on site, which may include telecommunications as necessary to support the Servicemember during the business hours established by the facility.
- Support transition outreach initiatives to create synergy between the transition from military service and achieving successful outcomes.

Deliverable 3.A.1 On-Site Support deliver Benefits I, Benefits II, CTTT, MLC events, Capstone, One-on-One engagements and Outreach & Public Engagement activities (CONUS)

Deliverable 3.A.2 On-Site Support deliver Benefits I, Benefits II, CTTT, MLC events, Capstone, One-on-One engagements and Outreach & Public Engagement activities (OCONUS)

Task 3: Part B. VA Benefits I and II Briefings

Conduct and deliver VA Benefits I and II Briefings, which includes modules on education, compensation, pension, vocational rehabilitation, home loan guaranty, insurance, burial benefits, health care and cemetery benefits as well as demonstrations of VA electronic tools providing Servicemembers additional information regarding their benefits and services available to them. DoD notifies the VA of all class scheduling, the VA will then provide all class scheduling's to the Contractor at the start of each year with updates approximately thirty to sixty days prior to any changes.

- VA Benefits I (estimated 4 hours) and Benefits II (estimated 2 hours) briefings to 100% of transitioning Servicemembers.
- The maximum class sizes for VA Benefits 1 and Benefits II is 50.

Task 3: Part C. Career Technical Training Track (CTTT)

Facilitate the CTTT, which includes instructing Servicemembers on how to complete licensing, certifications, and other education endeavors after transition. DoD notifies the VA of all class scheduling's, the VA will then provide all class scheduling's to the Contractor at the start of each year with updates approximately thirty to sixty days prior to any changes.

- CTTT (estimated 2 days) is not mandatory for Servicemembers, however participation can include Servicemembers, spouses, Veterans, and dependents interested in identifying civilian occupations, establishing career goals, and learning about credentialing and vocational training programs.
- The maximum class size is 25.

Task 3: Part D. Military Life Cycle (MLC)

Support MLC outreach events and activities. The goal of the MLC transition model is to provide transition training throughout the military career. The MLC model allows VA to identify, inform, and assist Servicemembers in a more robust and timely outreach model. MLC events can apply to all Servicemembers (not just those in transition) and Veterans, and can include, but are not limited to, the following touch points: Entry into Service / Permanent Duty Station / Change of Duty (Joint Reception Centers, in-processing, etc.) Reenlistment, Promotion, Deployment / Redeployment (briefings for Commanders, units, etc.), Mobilization / Activation & Demobilization / Deactivation (briefings for Commanders, Units, Reserve Component (RC)-specific community events, etc.), Major life events (marriage, children, family / spouse events, etc.) Retirement / Separation (briefings outside of TAP) Veteran groups and events that may occur on or off the installation. DoD notifies the VA of all MLC scheduling's, the VA will then provide all MLC scheduling's to the Contractor approximately thirty to sixty days prior to the event.

MLC (estimated 1 hour).

The average MLC event ranges from 50-100 participants.

Task 3: Part E. Capstone

Support Service Capstone events, whether individually or in a group setting. A Capstone event ensures that the objectives of all transition activities have been met and that the Servicemember has a viable plan for transition to civilian life. The Capstone is a mandatory component of Transition GPS where commanders, or commanders' designees, verify that Servicemembers have met Career Readiness Standards (CRS) and have a viable Individual Transition Plan (ITP). The purpose of the Capstone event is to evaluate Servicemember's preparedness to successfully transition from a military to a civilian career. If a Servicemember requires or desires follow-on assistance, the Commander will facilitate coordination to appropriate helping partners such as VA or the DoL. BA activities include:

- Provide assistance in locating contact information for local and hometown VA resources, including how to find the local Regional Office, VA Medical Centers, Vet Centers, and community resources referred during the VA Benefits I and II instruction.
- Support Capstone events to ensure a warm handover in order to meet the individual needs of the transitioning Servicemember.

- Capstone (estimated 1-4 hours) provided to Servicemembers as requested by the TAP Manager.
- Capstone event average ranges from 1-50 Servicemembers.

Task 3: Part F. One-on-One Engagements

Provide individual assistance on all VA benefits and services. This shall be inclusive of one-on-one engagements. This type of engagement could occur at any time throughout the Servicemember's career. This would typically include leveraging the materials developed to support individual Servicemembers and their family's needs. This task may include:

- Requests from Servicemembers to further explain benefits available to them, helping find answers to questions related to filing VA claims of any kind, finding a VA resource, such as local VA Medical Center or Vet Center.
- Assist with resume development, assistance with school selection related to the G.I. Bill® or unique VA benefits application completion.
- Individual assistance average 30-45 minute's min but not longer than 90 minutes per session.

Task 3: Part G. Transition Outreach & Public Engagement (O&PE)

Conduct outreach activities to ensure awareness of VA services available on the installation.

Transition Outreach & Public Engagement activities include:

- Providing outreach at military locations including commissaries, family centers, other identified DoD facilities, Veteran Service Organization events, Job fairs, local community resource activities or other related events. During attendance at these events, Benefits Advisors shall make it clear when communicating with others that their role is to advise stakeholders in VA Benefits and facilitate communication, but that they are not representative of VA.
- Supporting the National Guard (NG) and Reserve Component (RC). For example, VA Benefits Advisors may provide (non-transition) briefings at Air Reserve Co-located Wings or to individual units upon request.
- Outreach activities may range from 2-8 hours. Time does not include prep and travel.

Task 3: Part H. VA Outreach Reporting Tool (ORT)

Event management and timely reporting of data has become essential to the maintenance and sustainment of TAP. In order to properly account for all field events and activities for VA, each BA is responsible to enter data into the ORT on a daily basis for each Servicemember and family member who attends a VA TAP module. Data such as demographic information (Service, Gender, Age, Pay Grade, etc.), benefit application intentions, and topics discussed are collected by the BA during individual Servicemember research assistance. Additionally, all events occurring on a daily basis are reported by type (TAP events, Capstone events, MLC events and One-on-One Engagements). The ORT is a web based tool where the BA will enter in their pre-event or pre-brief information, including, but not limited to, event, location, POC and After Action Report (AAR), within five (5) days of the end of an event. This tool also allows for individual interactions to be entered and tracked for timeliness. If ORT is not accessible due to lack of internet connection, Contractor shall provide electronic reports of deliverables in MS Word.

Deliverable 3.H.1 **ORT Reporting and AAR**

TASK 4. Curriculum Development and Revision (Optional Task) (FFP)

This task shall include the complete development, deployment and sustainment of current TAP modules Benefits I, Benefits II, CTTT and MLC. Curriculum development task shall support efforts to delineate the goals, objectives, instructional resources and assessments of TAP modules. All materials shall be approved by the Government PM and COR prior to use.

Task 4: Part A. Curriculum Development

Support developing learning objective, evaluation criteria and a general course outline for the curriculum with the collaboration of the TEI training lead.

The Contractor shall:

- Based on those approved objectives by PM and COR, develop the instruction and training materials package, including but not limited to slide presentations, classroom activities, worksheet/handouts and instructor and participant guides.
- TAP “Virtual Curriculum”: The Contractor shall ensure that all virtual curriculum course content and materials remain current and relevant to ensure Servicemembers who are unable to attend TAP training in person in a “brick and mortar” classroom have the means to obtain online instruction. Currently virtual delivery of the Transition GPS

curriculum is via Joint Knowledge Online (JKO) learning management system and is a self-paced web based class.

*Deliverable 4.A.1 **Transition GPS, CTTT and TAP Virtual Curriculum materials and updates***

Task 4: Part B. MLC Development

Following the full analysis of the GPS curriculum, the Contractor shall create a recommended MLC outline for VA. These outlines shall include consideration for the associated instructor materials, participant guides, handouts and briefing slides. Proposed MLC curricula may be customized, targeted benefits briefings to address special interest topics in isolation such as Education Benefits; Records Maintenance for Future Disability Claims; Integrated Disability Evaluation System and Pre-Discharge Claims Processes; and other VA-related benefits and services as requested by stakeholders.

*Deliverable 4.B.1 **MLC Development and Materials***

Task 4: Part C. Curriculum Revision

The Interagency TAP council instituted an alternating year curriculum review cycle. A year of review, research, analysis and planning is followed by year of implementation and monitoring. The alternating year cycle consist of conducting Technical reviews and Deep dive reviews. Embedded in the cycle are continual reviews that will allow for responsiveness to immediate issues and risk. The interagency alternating year curriculum review cycle includes technical in FY17, deep-dive in FY18 and alternates thereafter through period of performance:

- FY17 update (technical review) – Performance Management Work Group (PMWG) prepares materials for Curriculum Work Group (CWG) in March 2016, Agency starts internal review in May – CWG starts in June 2016 and revised curriculum launched in January 2017.
- FY18 update (deep dive review) – PMWG prepares materials for CWG in March 2017, Agency starts internal review in May – CWG starts in June 2017 and revised curriculum launched in January 2018.

The Contractor shall:

- Support conducting Technical reviews for finding and fixing defects to ensure that all course content and materials remain current and relevant.
- Support conducting Deep dive reviews consisting of performing an extensive analysis of the curriculum for finding and fixing defects to ensure that all course content and materials remain current and relevant.
- Produce revised Instruction and Training Materials Package, including but not limited to slide presentations, classroom activities, worksheet/handouts and instructor guides and participant guide.

Deliverable 4.C.1 Conduct Technical review Benefit I and II, CTTT, MLC and Capstone and produce revised Instruction and Training Materials Package, including but not limited to slide presentations, classroom activities, worksheet/handouts and instructor and participant guides for Benefit I and II, CTTT, MLC and Capstone

Deliverable 4.C.2 Conduct Deep-Dive review Benefit I and II, CTTT, MLC and Capstone and produce revised Instruction and Training Materials Package, including but not limited to slide presentations, classroom activities, worksheet/handouts and instructor and participant guides for Benefit I and II, CTTT, MLC and Capstone

TASK 5. Training (T&M)

The training curriculum for the BA and Trainers to deliver module instruction to transitioning Servicemembers is multi-faceted. As the field staff is geographically dispersed around the world, the Contractor is encouraged to maximize the use of online and virtual tools to increase contact and communication with staff. However, virtual media shall only be seen as a tool used to enhance a well-designed training program, not as a replacement for high quality in-person training.

Advisor Assessments: BA and Trainer assessments are critical for evaluating and improving performance and development. At each successive level, BA and Trainer should be assessed on how well they are performing and monitored on their performance. There is no specific training

required for MLC and Capstone events. However, the Contractor is required to leverage the following training to facilitate MLC and Capstone events.

The Contractor shall support the following:

Task 5: Part A. Benefit I & II Training

- Conduct and update two-week, comprehensive, standards-based, classroom training program. This highly interactive, activity based curriculum shall be designed to provide BA with all of the requisite skills and information necessary to successfully execute Benefit I & II module.
- At a minimum provide and conduct Pre-training (individual study); classroom-based instruction; practice opportunities; evaluation.
- Conduct written and presentation evaluations to ensure BA skills demonstrate knowledge of VA benefits. Contractor must ensure all Briefers demonstrate proficiency in both written and presentation evaluations prior to conducting instruction.

Deliverable 5.A.1 Conduct and update two-week session for Benefit I & II Training

Deliverable 5.A.2 Training Materials Package for Benefit I & II Training, including but not limited to slide presentations, classroom activities, worksheet/handouts and participant guides

Task 5: Part B. CTTT Training

- Conduct and update three-week, comprehensive, standards-based, classroom training program. This highly interactive, activity based curriculum shall be designed to provide BA with all of the requisite skills and information necessary to successfully execute CTTT briefings.
- At a minimum provide and conduct Pre-training (individual study); classroom-based instruction; practice opportunities; evaluation; and ongoing refresher training.
- Conduct written and presentation evaluations to ensure BA skills demonstrate knowledge of Benefit I & II and CTTT. Contractor must ensure all Briefers demonstrate proficiency in both written and presentation evaluations prior to conducting instruction.

Deliverable 5.B.1 Conduct and update three week session for CTTT Training

*Deliverable 5.B.2 **Training Materials Package for CTTT Training, including but not limited to slide presentations, classroom activities, worksheet/handouts and participant guides***

Task 5: Part C. Train-the-Trainer Training

- Conduct and update three-week, comprehensive, standards-based, classroom train-the-trainer program. This highly interactive, activity based curriculum shall be designed to provide trainers with all of the requisite skills and information necessary to successfully execute instructional advisor training.
- At a minimum prepare trainers to train advisors to present information effectively, respond to participant questions and lead activities that reinforce module objectives. Trainers should be able to have mastery of modules objectives and resources to instruct advisors on how to ensure participants are cognizant of supplementary resources and reference materials.
- Training session shall include at a minimum; (a) classroom-based instruction; (b) practice opportunities; and (c) evaluation.
- Conduct written and presentation evaluations to ensure Trainer skills demonstrate knowledge of Benefit I & II, CTTT, MLC and Capstone. Contractor must ensure all Trainers demonstrate proficiency in both written and presentation evaluations in order to be approved to conduct training instruction.

*Deliverable 5.C.1 **Conduct and update three-week session for Train-the-Trainer***

*Deliverable 5.C.2 **Training Materials Package for Train-the-Trainer, including but not limited to slide presentations, classroom activities, worksheet/handouts and participant guides***

Task 5: Part D. Refresher Training

- Conduct and update short-term course aimed at recall and reinforcement of previously acquired knowledge and skills with all of the requisite skills and information necessary to successfully execute Benefit I & II module, CTTT briefings and Train-the-Trainer. Occurs each quarter.

*Deliverable 5.D.1 **Conduct and update refresher training session***

*Deliverable 5.D.2 **Refresher Training Materials Package***

TASK 6. Plans, Analysis and Evaluation (PA&E) (FFP)

Planning, analysis and evaluation (PA&E) are at the core of all functions of this PWS. PA&E task shall support and foster a culture of evidence-based decision making to ensure TAP maintains the capability to provide effective support to transitioning Servicemembers, Veterans and their families. The Contractor shall support measuring program effectiveness to include reviewing objectives, recommend evaluation criteria, collecting data, synthesizing data, drafting reports and support in the implementation of results.

The Contractor shall:

- Support short- and long-range TAP strategic planning and implementation; track and report on progress toward the achievement of TAP strategic goals; identify and overcome potential barriers to success.
- Develop a formal performance management framework, which offers approaches that use measurement as a component of improving TAP performance supported by a robust evaluation and data analytics infrastructure.
- Support TEI in conducting advanced data analytics through data mining, modeling, forecasting, and advanced statistical methods.
- Support geospatial mapping of Servicemember demand with military installations using a hub and spoke concept, and demand scheduling and location sequencing for DoD installations worldwide;
- Conduct analyses of potential Servicemember and Veteran transition policies.
- Perform Portfolio Analysis, conduct assessments of TEI programs and resources to identify gaps and emerging areas in reference to Transition assistance.

Deliverable 6.A.1 TAP Performance Analysis (Monthly)

Deliverable 6.A.2 Mid-Year and End-of-Year Assessments of VA TAP model

Deliverable 6.A.3 TAP Performance Framework (Annually)

Deliverable 6.A.4 Advance Data Analytics Report (Quarterly).

Deliverable 6.A.5 Model Patterns and Relationships (Quarterly)

Deliverable 6.A.6 Geospatial Mapping of Servicemember Demand (Quarterly)

Deliverable 6.A.7 Servicemember Transition Policies Report (Quarterly)

Deliverable 6.A.8 TEI Programs Portfolio Analysis (Annually)

D. EVALUATED OPTIONAL TASKS AND ASSOCIATED DELIVERABLES

TASK 7. Optional: TAP Maturation and Transition Priority Programs (FFP)

Task 7: Part A. Maturation of VA TAP Model

The Contractor shall develop a proposed maturation framework approach to mature the current TAP model to support effective and optimized TAP management, integration and oversight for TAP. The framework approach shall address, at a minimum, incorporating the existing portfolios of VBA business lines to include governance structures, roles and responsibilities, portfolio management processes, portfolio process interactions, portfolio process assets and portfolio roadmaps.

Deliverable 7.A.1 Maturation framework approach outline

Deliverable 7.A.2 Development Maturation Framework

Deliverable 7.A.3 Assessment Maturation Framework

Deliverable 7.A.4 Implementation Maturation Framework

Deliverable 7.A.5 Sustainment Maturation Framework

Task 7: Part B. Transition Priority Programs

The Contractor shall support development, implementation, assessment, and sustainment of innovative programs to support Transitioning Servicemembers, Veterans and their family. The Contractor shall assist, conduct research, and provide recommendations to VBA leadership. Efforts associated with this task encompass providing recommendations, analyses, assistance, and input through all phases.

Deliverable 7.B.1 Transition Priority Programs Outline

Deliverable 7.B.2 Development of Transition Priority Programs

Deliverable 7.B.3 Implementation Transition Priority Programs

Deliverable 7.B.4 Assessment of Transition Priority Programs

Deliverable 7.B.5 Sustainment Transition Priority Programs

TASK 8. Optional: New Module Development & Training (Time and Material) (T&M)

This task shall include the complete design, development, and deployment of a new classroom instruction module similar to the existing Benefits I, Benefits II or Career and Technical Training Track. The contractor will be required to submit a cost estimate of all training, materials and delivery for Government approval. The Government expects that this task will not take more than 90 days to execute. The CLINS for these optional tasks will be built into the base and option years to be utilized semi-annually. They will be used only if needed and at the convenience of the Government in the execution of the mission to support this PWS.

Task 8: Part A. New Module Development

- Support developing learning objective, evaluation criteria and a general course outline for the curriculum with the collaboration of the TEI Training Lead.
- Based on those approved objectives by PM and COR, the Contractor shall develop the instruction and training materials package, including but not limited to slide presentations, classroom activities, worksheet/handouts and instructor and participant guides.

Deliverable 8.A.1 New Module Development

Task 8: Part B. New Module Revision

Support revision of new modules developed.

Deliverable 8.B.1 Conduct Technical Review - New Module

Deliverable 8.B.2 Produce revised Instruction and Training Materials Package, including but not limited to slide presentations, classroom activities, worksheet/handouts and instructor and participant guides

Deliverable 8.B.3 Conduct Deep-Dive Review - New Module

Deliverable 8.B.4 Produce revised Instruction and Training Materials Package, including but not limited to slide presentations, classroom activities, worksheet/handouts and instructor and participant guides

Task 8: Part C. New Module Training

- Conduct comprehensive, standards-based, classroom training program. This highly interactive, activity based curriculum shall be designed to provide BA with all of the requisite skills and information necessary to successfully execute new module.
- At a minimum provide and conduct Pre-training (individual study); classroom-based instruction; practice opportunities; evaluation.
- Conduct written and presentation evaluations to ensure BA skills demonstrate knowledge of VA benefits. Contractor must ensure all Briefers demonstrate proficiency in both written and presentation evaluations prior to conducting instruction.

Deliverable 8.C.1 Conduct New Module Training Session

Deliverable 8.C.2 Training Materials Package, including but not limited to slide presentations, classroom activities, worksheet/handouts and participant guides

Task 8: Part D. Train-the-Trainer Training

- Conduct comprehensive, standards-based, classroom train-the-trainer program. This highly interactive, activity based curriculum shall be designed to provide trainers with all of the requisite skills and information necessary to successfully execute instructional advisor training.
- At a minimum prepare trainers to train advisors to present information effectively, respond to participant questions and lead activities that reinforce module objectives. Trainers should be able to have mastery of modules objectives and resources to instruct advisors on how to ensure participants are cognizant of supplementary resources and reference materials.
- Training session shall include at a minimum; classroom-based instruction; practice opportunities; evaluation; and ongoing refresher training.
- Conduct written and presentation evaluations to ensure Trainer skills demonstrate knowledge of new module. Contractor must ensure all Trainers demonstrate proficiency in both written and presentation evaluations prior to conducting instruction.

Deliverable 8.D.1 Conduct Training Session

Deliverable 8.D.2 Training Materials Package, including but not limited to slide presentations, classroom activities, worksheet/handouts and participant guides

Task 8: Part E. Refresher Training

- a. Conduct short-term course aimed at recall and reinforcement of previously acquired knowledge and skills with all of the requisite skills and information necessary to successfully execute new module.

Deliverable 8.E.1 Conduct Refresher Training Session

Deliverable 8.E.2 Refresher Training Materials Package

E. SCHEDULE FOR DELIVERABLES

If for any reason the scheduled time for a deliverable cannot be met, the Contractor is required to explain why (include the original deliverable due date) in writing to the CO, including a firm commitment of when the work shall be completed. This notice to the CO shall cite the reasons for the delay and the impact on the overall project. The CO will then review the facts and issue a response in accordance with applicable regulations.

F. OTHER DIRECT COSTS

ODCs such as supplies and on-site maintenance and equipment will be reimbursed at Contractor cost only when requested by and pre- approved by COR. Each Contractor's invoice must include copies of all receipts that support the ODCs claimed in the invoice and written substantiation for the incurred costs. Total ODC shall not exceed the ODC amount in the price schedule.

The contractor is responsible for providing all employees with computers, mobile phones, and other IT equipment and items necessary to perform the taskings of this PWS. This is not reimbursable under ODCs.

G. GOVERNMENT FURNISHED INFORMATION, EQUIPMENT, AND FACILITIES

The Contractor will be responsible for completion of a site survey to identify any supplies/equipment that will be required for the successful completion of this PWS. At the time of the TAPS class execution, if the Contractor identifies any additional supplies/materials necessary for the successful completion of the TAPS classes, the Contractor shall obtain these

items with COR approval. These additional supplies/materials are the responsibility of the Contractor. Throughout performance of the contract, the Contractor shall identify any Government furnished equipment (GFE) and submit request for approval and action by COR.

H. CHANGES TO PERFORMANCE WORK STATEMENT

Any changes to this PWS shall be authorized and approved only through written correspondence from the CO through execution of a modification. Costs incurred by the Contractor through the actions of parties other than the CO shall be borne by the contractor.

I. TRAVEL

VA Travel and per diem shall be reimbursed in accordance with Federal Acquisition Regulation 31.205-46 as well as Federal Travel Regulations. Each contractor's invoice must include copies of all receipts that support the travel costs claimed in the invoice. Travel must be pre-approved by the COR. Travel must be priced separately in the price schedule. Local travel within a 50-mile radius from the contractor's facility is considered the cost of doing business and will not be reimbursed. This includes travel, subsistence, and associated labor charges for travel time.

Travel performed for personal convenience and daily travel to and from work at the contractor's facility will not be reimbursed. Travel, subsistence, and associated labor charges for travel time for travel beyond a 50-mile radius of the contractor's facility are authorized on a case-by-case basis and must be pre-approved by the COR.

Travel will be necessary in the United States and overseas on a continual basis. Travel must be approved in advance by the COR and will be reimbursed in accordance with the FAR31.205-46. Total travel cost shall not exceed the travel amount in the price schedule. Each Contractor invoice must include copies of all receipts that support the travel costs claimed in the invoice. The Government will not be responsible for any relocation expenses associated with moving Contractor personnel (even if a replacement is required) to the Washington, DC, commuting area or other job sites as may be identified either initially, or if necessary, with replacement of personnel.

J. GOVERNMENT RESPONSIBILITIES

The Government will provide office space for required onsite support and authorization for VA email and network access.

K. CONTRACTOR EXPERIENCE REQUIREMENTS – KEY PERSONNEL

Certain skilled, experienced professional and/or technical personnel are essential for accomplishing the work to be performed. **These individuals are defined as Key Personnel and are those persons whose résumés were submitted and marked by the Contractor as Key Personnel under the Technical Approach factor.** Prior to key personnel being removed, diverted, or replaced from work, contractor shall provide notice to the PM, CO and COR. If such a circumstance is necessary, a comparable replacement will need to meet the requirements of the PWS.

Substitution of Key Personnel: All Contractors requests for approval of substitutions hereunder shall be submitted in writing to the PM, COR and the CO at least fifteen (15) calendar days in advance of the effective date, whenever possible, and shall provide a detailed explanation of the circumstances necessitating the proposed substitution, a complete résumé for the proposed substitute, and any other information requested by the CO necessary to approve or disapprove the proposed substitution. The PM, COR and the CO will evaluate such requests and promptly notify the Contractor of approval or disapproval in writing. New personnel shall not commence work until all necessary security requirements have been fulfilled.

Any substituted personnel shall have the equivalent or better education, experience, and credentials than the personnel they replace, subject to VA review and approval.

Furthermore, Contractor personnel are expected to be proficient using office automation equipment and software, and have sufficient written and verbal communication skills to support VA. Additionally, Contractor personnel are expected to have professional conduct that represents the VA positively. Should any Contractor personnel be determined to be unacceptable in terms of technical competency or unacceptable personal conduct while on-site or while working on contract activities, the Contractor shall immediately remove and replace the unacceptable on-site personnel at no additional cost to the Government. Contractor personnel are to serve in a support role; final decisions regarding VA business will always be made by Government personnel. Contractor personnel shall not imply or misrepresent themselves as VA employees.

Key personnel are as follows:

Principle: The Principle is defined as an individual with 15+, years of relevant experience: education: Bachelor's Degree with 15 years total relevant experience with certification in project management (e.g., Project Management Professional (PMP) or additional 4 years' experience in a

related field). Skills/Experience: Experience relevant to the PWS of successfully managing large-scale organizations involving multiple programs in support of an agency's mission with a total lifecycle budget and complexity comparable to the contract at hand. The Principle shall have a proven track record of engaging with related agencies at a senior level.

Program Manager: The Program Manager is defined as an individual with 12+ years of relevant experience. Education: Bachelor's Degree with 12 years total relevant experience. Certifications: Certification in project management (e.g., Project Management Professional (PMP) or additional 4 years' experience in a related field. Skills/Experience: Experience relevant to the PWS of successfully directing and controlling the activities of one or more large programs. The Program Manager shall have a proven track record of engaging with related agencies at a senior level.

L. CONTRACTOR EXPERIENCE REQUIREMENTS – STANDARD PERSONNEL

Skilled experienced professional and/or technical personnel are essential for successful contractor accomplishment of the work to be performed under this contract. All Contractor personnel are expected to be proficient using office automation equipment and software, and have sufficient written and verbal communication skills to support VA. Additionally, Contractor personnel are expected to maintain professional conduct that represents the VA positively. Should any Contractor personnel be determined to be unacceptable in terms of technical competency or unacceptable personal conduct while on-site or while working on contract activities, the Contractor shall immediately remove and replace the unacceptable on- site personnel at no additional cost to the Government. Contractor personnel are to serve in a support role; final decisions regarding VA business will always be made by Government personnel.

Given that this contract represents a continuation of services that have been in place for multiple years, the contract shall give priority to individuals who have supported the effort over hiring new individuals, if possible. However, if the current individual is not able to perform the work to an acceptable level, it is understood that he/she would not be hired to support this contract.

M. VA INFORMATION AND INFORMATION SYSTEM SECURITY/PRIVACY REQUIREMENTS

1. VA Information and Information System Security/Privacy Requirements
 - a. General

All Contractors and Contractor personnel shall be subject to the same Federal security and privacy laws, regulations, standards and VA policies as VA, including the Privacy Act, 5 U.S.C. §552a, and VA personnel, regarding information and information system security. Contractors must follow policies and procedures outlined in VA Directive 6500, Information Security Program; and VA Handbook 6500.6, Contract Security which are available at: <http://www1.va.gov/vapubs> and its handbooks to ensure appropriate security controls are in place.

b. *Access to VA Information and VA Information Systems*

1. VA will supply the Contractor with the minimum logical (technical) and/or physical access to VA information and VA information systems for employees, sub-contractors: (1) to perform the services specified in the contract, (2) to perform necessary maintenance functions for electronic storage or transmission media necessary for performance of the contract, and (3) for individuals who first satisfy the same conditions, requirements, and restrictions that comparable VA employees must meet to have access to the same type of VA information.
2. All Contractors and subcontractors working with VA Sensitive Information are subject to the same investigative requirements as those of regular VA appointees or employees who have access to the same types of information. The level of background security investigation will be in accordance with VA Directive 0710, Handbook 0710, which are available at: <http://www1.va.gov/vapubs>, and VHA Directive 0710 and Implementation Handbook 0710.01, which are available at: <http://www1.va.gov/vhapublications/index.cfm> . Contractors are responsible for screening their employees. The following are VA's approved policy exceptions for meeting VA background screenings/investigative requirements for certain types of Contractor personnel:
 - Contractor personnel not accessing VA information resources, such as personnel hired to maintain the medical facility grounds, construction contracts, utility system contractors, etc.
 - Contractor personnel with limited and intermittent access to equipment connected to networks on which no VA sensitive information resides
 - Contractor personnel with limited and intermittent access to equipment connected to networks on which limited VA sensitive information resides and with limited and intermittent access to facilities at which they are escorted

- c. VA Information Custodial Requirements
1. VA information provided to the Contractor for either the performance or administration of this contract shall only be used for those purposes. No other use is permitted without the CO's express written authorization. This clause expressly limits the Contractor's rights to use data as described in Rights in Data - General, FAR 52.227-14(d)(1). The Government shall retain the rights to all data and records produced in the execution or administration of this contract.
 2. Prior to termination or completion of this contract, Contractor will not destroy information received from VA or gathered or created by the Contractor in the course of performing this contract without prior written approval by the CO. A Contractor destroying data on VA's behalf must do so accordance with National Archives and Records Administration (NARA) requirements as outlined in VA Directive 6300, Records and Information Management and its Handbook 6300.1 Records Management Procedures, and applicable VA Records Control Schedules. All data and reports shall be transferred to VBA upon contract completion.
 3. The Contractor shall not make copies of VA information, electronic or otherwise, except as necessary to perform the terms of the agreement or to preserve electronic information stored on Contractor electronic storage media for restoration in case any electronic equipment or data used by the Contractor needs to be restored to an operating state.
 4. The Contractor shall not use technologies banned in VA in meeting the requirements of the contract (e.g., Bluetooth-enabled devices).

d. Physical Security

If the contract requires taking VA data to a contractor site and the data contains Personally Identifiable Information, the Contractor will provide an independent physical security assessment of their facility to the COR prior to commencing work. General guidelines for physical security can be found in VA Directive 0730, Section 6 (Physical Security) and VA Memorandum (subj: IT Oversight & Compliance Information Physical Security Assessments) dated October 24, 2007.

e. Training

All Contractor and subcontractor personnel requiring access to VA information and VA information systems shall complete the following before being granted access to VA information and networks:

1. Sign and acknowledge understanding of and responsibilities for compliance with the *National Rules of Behavior* related to access to VA information and information systems
2. Successfully complete VA Information Security Awareness training and annual refresher training as required
3. Successfully complete VA Privacy Awareness training and annual refresher training as required
4. Successfully complete any additional Information Security or Privacy training as required for VA personnel with equivalent information system access

The Contractor shall provide to the COR a copy of the training certificates for each applicable employee within 1 week of the initiation of the contract and annually thereafter, as required. These online courses are located at www.tms.va.gov. To self-enroll, click the “Create New User” button on the red bar and complete the assigned training. The COR will provide the Contractor with the appropriate information to complete self-enrollment. Technical issues with TMS should be directed to the TMS help desk at vatmshelp@va.gov or 1.866.496.0463.

Failure to complete this mandatory training within the timeframe required will be grounds for suspension or termination of all physical and/or electronic access privileges and removal from work on the contract until such time as the training is completed.

f. *Contractor Personnel Security*

All contract employees who require access to the VA site(s) and/or access to VA local area network (LAN) systems shall be the subject of a background investigation and must receive a favorable adjudication from the VA Security and Investigations Center (SIC). These requirements are applicable to all subcontractor personnel requiring the same level of Background Investigation.

The level of background security investigation will be in accordance with VA Directive 0710 dated September 10, 2004 and is available at

http://www1.va.gov/vapubs/viewPublication.asp?Pub_ID=487&FType=2

g. *Background Investigation*

The contract employee level of background investigation required for this effort is: *NACI*.

h. *Contractor Responsibilities*

1. The Contractor shall bear the expense of obtaining background investigations or reciprocals of previous investigations held that meet or exceed the required investigation level. **The cost of background investigations is based on the current Office of Personnel Management (OPM) rate at the time the application is processed at OPM.** Fiscal Year 2016 rates are as follows: Low Risk (NACI) **\$392**, Moderate Risk (MBI) **\$1,388**, High Risk (BI) **\$4,476** or Reciprocals are **\$75**. VA will pay for investigations or reciprocals processed through the VA SIC and conducted by OPM in advance; however, the Contractor shall reimburse the full cost of background investigations/reciprocals to VA within 30 days of Bill of Collections received from VA. VA shall send up to three plus one final delinquent notice to the Contractor. If the Contractor does not adhere to the Bill of Collections, future invoices may be subject to be offset by VA to recoup background investigation/reciprocal costs.
2. Immediately after contract or task order award, the COR will provide the Contractor with the following background investigation documents to be completed by the Contractor and returned to the COR to begin the background investigation process for all contract employees working on the contract who will have access to VA facilities, VA systems, or privacy data:
 - Background Investigation Request Worksheet
 - Optional Form 306 – Declaration of Federal Employment
 - Fingerprint Request Form
3. Upon receipt of the above-stated documents from the COR, the VSC will perform preliminary onboarding review and process the request through the SIC. **Upon notification of favorable fingerprint results by the VSC, the Contractor may begin work while the background investigation is ongoing.** Thereafter, the Contractor will receive an email notification from the SIC identifying the website link that includes detailed instructions regarding completion of the background clearance application process in the Electronic Questionnaires for Investigations Processing (e-QIP) system. E-QIP is an online, Internet accessible system where the Contractor employee shall complete the security questionnaire required for OPM to process the background investigation.
4. Contractors who have a current favorable background investigation previously conducted by OPM or Defense Security Service (DSS) may be accepted through reciprocity. When a previous clearance is currently held, it does not preclude the Contractor from

submitting a complete Background Investigation Package as stated above to the COR immediately after contract or task order award for all contract employees who will be working on the contract.

5. The Contractor shall prescreen all personnel who require access to VA site(s) and/or access to VA LAN systems to ensure they maintain a U.S. Citizenship or Alien Registration that authorizes them to work in the U.S. and are able to read, write, speak and understand the English language.
6. Contract performance **shall not** commence before:
 - a. The VSC has confirmed favorable fingerprint results, **or**
 - b. SIC confirms that it has received the Contractor's investigative documents, the documents are complete, and that the investigation information has been released to OPM for scheduling of the background investigation, **or**
 - c. VSC or the SIC has confirmed that the verified investigation will be reciprocated.
7. The COR will notify and forward the Contractor a copy of the Certificate of Eligibility (Form 4236) if the investigation has been reciprocated. The Contractor, if notified of an unfavorable adjudication by the Government, shall withdraw the employee from consideration from working under the contract. Failure to comply with the Contractor personnel security requirements may result in termination of the contract for default.
8. The Contractor will be responsible for the actions of those contract and subcontract employees they provide to perform work for VA. In the event damage arises from work performed by Contractor personnel, under the auspices of the contract, the Contractor will be responsible for resources necessary to remedy the incident.
9. Should the Contractor use a Contractor other than OPM or DSS to conduct investigations, the investigative company must be certified by OPM/DSS to conduct Contractor investigations. The Contractor Cage Code number must be provided to the VA SIC, which will verify the information and conclude whether access to the Government's site(s) and/or VA LAN systems can be granted.
10. The investigative history for Contractor personnel working under this contract must be maintained in the databases of either OPM or the Defense Industrial Security Clearance Organization (DISCO).
 - i. Government Responsibilities

1. After the SIC has adjudicated the background investigation package from the Contractor, the SIC will send an e-mail notification to the Contractor and their POC identifying the e-QIP website link that includes detailed instructions regarding completion of the background clearance application process and the level of background that was requested.
2. Upon receipt of required investigative documents, SIC will review the investigative documents for completion and initiate the background investigation by forwarding the investigative documents to OPM to conduct the background investigation. If the investigative documents are not complete, the SIC will notify the Contractor of deficiencies and include corrective instructions.
3. VA will pay for investigations and reciprocals processed through the VA SIC and conducted by OPM in advance, however, the Contractor shall reimburse the full cost of background investigations/reciprocals to VA within 30 days of Bill of Collections from VA. VA shall send up to three plus one final delinquent notice to the Contractor. If the Contractor does not adhere to the Bill of Collections, future invoices may be subject to be offset by VA to recoup background investigation costs and may be considered grounds for default.
4. The COR will notify and forward the Contractor a copy of the Certificate of Eligibility (Form 4236) if the investigation has been reciprocated. The COR will also notify the Contractor of an unfavorable adjudication by the Government.

j. Security Incident Investigation

The term “security incident” means an event that has, or could have, resulted in unauthorized access to, loss or damage to VA assets, or sensitive information, or an action that breaches VA security procedures. The contractor/subcontractor shall immediately notify the COR and simultaneously, the designated ISO and Privacy Officer for the contract of any known or suspected security/privacy incidents, or any unauthorized disclosure of sensitive information, including that contained in system(s) to which the contractor/subcontractor has access.

Attachment A: Schedule of Deliverables

All Contractor provided work products are to be furnished within the specified delivery schedule (see below). Any changes to delivery dates must be discussed with the CO and COR. Significant changes to delivery schedule must be requested in writing to the CO. If for any reason any deliverable cannot be delivered within the scheduled time frame, the Contractor is required to explain why in writing to the CO including a firm commitment of when the work will be completed. This notice will cite the reasons for the delay and the impact on the overall project. All deliverables shall be delivered to the Government network unless otherwise noted.

Deliverable	Deliverable Number	Delivery / Format	Due Date
Project Management Plan (PMP)	1.A.1	One hard copy / One electronic copy – MS Word	Within fourteen (14) days of award
Staffing Plan, Organizational Structure	1.A.1	One hard copy / One electronic copy – MS Word	Within fourteen (14) days of award
Weekly Hiring Plan and Tracker	1.A.1	One hard copy / One electronic copy – MS Excel	Within fourteen (14) calendar days after contract award or as agreed upon between VA Government PM, COR, and Contractor.
In-Processing and Training Plan	1.A.1	One hard copy / One electronic copy – MS Word	Within fourteen (14) days of award
In-Processing and Training Plan Tracker	1.A.1	One hard copy / One electronic copy – MS Excel	Within fourteen (14) calendar days after contract award or as agreed upon between VA Government PM, COR, and Contractor.
Operational Deployment Plan with weekly updates	1.A.1	One hard copy / One electronic copy – MS Word	Within fourteen (14) days of award
Contractor Communications Plan	1.A.1	One hard copy / One electronic copy – MS Word	Within fourteen (14) days of award
Risk Assessment and Mitigation Plan	1.A.1	One hard copy / One electronic copy – MS Word	Within fourteen (14) days of award
Quality Control Plan (QCP)	1.A.1	One electronic copy – MS Word	Within fourteen (14) days of award

Deliverable	Deliverable Number	Delivery / Format	Due Date
Transition Plan	1.A.1	One electronic copy – MS Word	Within fourteen (14) days of award
Project Kickoff Briefing	1.B.1	One electronic copy – MS PowerPoint	Within ten (10) calendar days after contract award or as agreed upon between VA Government PM, COR, and Contractor.
Monthly IPR Briefing	1.C.1	One electronic copy – MS Word	No later than the 5th calendar day of each month
Monthly Smart book Report	1.C.2	One electronic copy – MS Word	No later than the 5th calendar day of each month
Pre-Trip Request	1.C.2	One electronic copy – MS Word	Fourteen (14) business days in advance
Post Trip Reports	1.C.2	One electronic copy – MS Word	Within three (3) business days of completion
Weekly Operations Meeting	1.D.1	Teleconferencing and/or web conferencing.	Summary (2) business days prior to the meeting.
Weekly Status Report	1.D.1	One electronic copy – MS Word	Two (2) business days prior to the meeting
Meeting Minutes	1.D.1	One electronic copy – MS Word	Within one (1) business day of the meeting
Governance EC, SSG, and working group meeting minutes	2.A.1	One electronic copy – MS Word	Two (2) business days of completion of meeting
Policy Analysis Report	2.A.1	One electronic copy – MS Word	Within three (3) business days of PMO request
Drafting and Coordination of TAP Congressional and Legislative Documents	2.A.1	One electronic copy – MS Word	As required
Schematics, Directives and Standard Operating Procedures	2.A.1	One hard copy / One electronic copy – MS Word	As required
Change Control Process, Form and Artifacts	2.A.1	One hard copy / One electronic copy – MS Word	Submission of draft within two (2) business days of PMO request
On-Site Support (CONUS)	3.A.1	In person	As required

Deliverable	Deliverable Number	Delivery / Format	Due Date
On-Site Support (OCONUS)	3.A.2	In person	As required
ORT Reporting and AAR	3.H.1	Recorded in ORT	Reporting, day of interaction and AAR Within five (5) days of each event CONUS and OCONUS
Transition GPS,CTTT and TAP Virtual Curriculum materials and updates	4.A.1	Hard Copy of revised material / Electronic Copy in appropriate MS Application (Word, PowerPoint, Excel)	To be determined by PMO
MLC Development and MLC materials	4.B.1	Hard Copy of revised material / Electronic Copy in appropriate MS Application (Word, PowerPoint, Excel)	To be determined by PMO
Conduct Technical Review Benefit I and II, CTTT, MLC and Capstone and Produce revised Instruction and Training Materials Package (Technical Review)	4.C.1	Hard Copy of revised material / Electronic Copy in appropriate MS Application (Word, PowerPoint, Excel)	To be determined by PMO
Conduct Deep-Dive Review Benefit I and II, CTTT, MLC and Capstone and Produce Revised Instruction and Training Materials Package (Deep Dive)	4.C.2	Hard Copy of revised material / Electronic Copy in appropriate MS Application (Word, PowerPoint, Excel)	To be determined by PMO
Conduct and update Two-Week Session for Benefit I & II Training	5.A.1	In-Person	As required
Provide Training Materials Package for Two-week Session for Benefit I & II Training	5.A.2	Hard copy(ies) as needed / Electronic Copy in appropriate MS Application (Word, PowerPoint, Excel)	As required

Deliverable	Deliverable Number	Delivery / Format	Due Date
Conduct and update Three-Week Session for CTTT Training	5.B.1	Hard copy(ies) as needed / Electronic Copy in appropriate MS Application (Word, PowerPoint, Excel)	As required
Training Materials Package for CTTT Training	5.B.2	Hard copy(ies) as needed / Electronic Copy in appropriate MS Application (Word, PowerPoint, Excel)	As required
Conduct and update Three-Week Session for Train-the-Trainer	5.C.1	Hard copy(ies) as needed / Electronic Copy in appropriate MS Application (Word, PowerPoint, Excel)	As required
Training Materials Package for Train-the-Trainer	5.C.2	Hard copy(ies) as needed / Electronic Copy in appropriate MS Application (Word, PowerPoint, Excel)	As required
Conduct and update Refresher Training Session	5.D.1	Hard copy(ies) as needed / Electronic Copy in appropriate MS Application (Word, PowerPoint, Excel)	As required
Refresher Training Materials Package	5.D.2	Hard copy(ies) as needed / Electronic Copy in appropriate MS Application (Word, PowerPoint, Excel)	As required
TAP Performance Analysis	6.A.1	One hard copy / One electronic copy – MS Word	Monthly
Mid-Year and End-of-Year Assessments of VA TAP Model	6.A.2	One electronic copy – MS Word	Bi-Annually
TAP Performance Framework	6.A.3	One hard copy / One electronic copy – MS Word	Annually
Advanced Data Analytics Report	6.A.4	One hard copy / One electronic copy – MS Word	Quarterly

Deliverable	Deliverable Number	Delivery / Format	Due Date
Model patterns and relationships (Quarterly)	6.A.5	One hard copy / One electronic copy – MS Word	Quarterly
Geospatial Mapping of Servicemember Demand	6.A.6	One hard copy / One electronic copy – MS Word	Quarterly
Servicemember Transition Policies Report	6.A.7	One hard copy / One electronic copy – MS Word	Quarterly
TEI Programs Portfolio Analysis	6.A.8	One hard copy / One electronic copy – MS Word	Annually
Maturation Framework Approach Outline	7.A.1	Format agreed upon between VA Government PM, COR, and Contractor	To be determined by PMO
Development Maturation Framework	7.A.1.a	Format agreed upon between VA Government PM, COR, and Contractor	To be determined by PMO
Assessment Maturation Framework	7.A.1.b	Format agreed upon between VA Government PM, COR, and Contractor	To be determined by PMO
Implementation Maturation Framework	7.A.1.c	Format agreed upon between VA Government PM, COR, and Contractor	To be determined by PMO
Sustainment Maturation Framework	7.A.1.d	Format agreed upon between VA Government PM, COR, and Contractor	To be determined by PMO
Transition Priority Programs Outline	7.B.1	Format agreed upon between VA Government PM, COR, and Contractor	To be determined by PMO
Development of Transition Priority Programs	7.B.1.a	Format agreed upon between VA Government PM, COR, and Contractor	To be determined by PMO

Deliverable	Deliverable Number	Delivery / Format	Due Date
Implementation Transition Priority Programs	7.B.1.b	Format agreed upon between VA Government PM, COR, and Contractor	To be determined by PMO
Assessment of Transition Priority Programs	7.B.1.c	Format agreed upon between VA Government PM, COR, and Contractor	To be determined by PMO
Sustainment Transition Priority Programs	7.B.1.d	Format agreed upon between VA Government PM, COR, and Contractor	To be determined by PMO
New Module Development	8.A.1	Format agreed upon between VA Government PM, COR, and Contractor	To be determined by PMO
Conduct Technical Review - New Module	8.B.1	Format agreed upon between VA Government PM, COR, and Contractor	To be determined by PMO
Produce Revised Instruction and Training Materials Package – New Module – Technical Review	8.B.1.a	Format agreed upon between VA Government PM, COR, and Contractor	To be determined by PMO
Conduct Deep-Dive Review - New Module	8.B.2	Format agreed upon between VA Government PM, COR, and Contractor	To be determined by PMO
Produce Revised Instruction and Training Materials Package - New Module - Deep Dive	8.B.2.a	Format agreed upon between VA Government PM, COR, and Contractor	To be determined by PMO
Conduct Training Session – New Module	8.C.1	Format agreed upon between VA Government PM, COR, and Contractor	To be determined by PMO
Training Materials Package – New Module	8.C.2	Format agreed upon between VA Government PM, COR, and Contractor	To be determined by PMO

Deliverable	Deliverable Number	Delivery / Format	Due Date
Conduct Training Session – New Module – Train-the Trainer	8.D.1	Format agreed upon between VA Government PM, COR, and Contractor	To be determined by PMO
Training Materials Package – New Module – Train-the Trainer	8.D.2	Format agreed upon between VA Government PM, COR, and Contractor	To be determined by PMO
Conduct Refresher Training Session – New Module	8.E.1	Format agreed upon between VA Government PM, COR, and Contractor	To be determined by PMO
Refresher Training Materials Package – New Module	8.E.2	Format agreed upon between VA Government PM, COR, and Contractor	To be determined by PMO