

# **Rapid Appeals Modernization Program**



**DEPARTMENT OF VETERANS AFFAIRS**

**Veterans Benefits Administration**

**DRAFT Performance Work Statement (PWS)**

**Rapid Appeals Modernization Program (RAMP)**

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# Rapid Appeals Modernization Program

## Table of Contents

1.0	Introduction.....	3
2.0	Scope .....	4
3.0	Period of Performance.....	4
4.0	Place and Hours of Performance .....	5
5.0	Travel .....	6
6.0	Task Statements .....	7
6.1	Project Management .....	7
6.1.1	Contractor Project Management Plan (PMP) .....	7
6.1.2	Contract Kick-Off and Recurring Status Meetings.....	8
6.2	RAMP Call Operations .....	9
	Non-RAMP Related Calls.....	11
6.3	QA of RAMP Calls.....	11
7.0	General Requirements .....	13
8.0	Reporting.....	14
8.1.1	Weekly Status Report .....	15
8.1.2	Monthly Status Report.....	16
8.1.3	Monthly Quality Review Report and Supporting Data .....	16
9.0	Training .....	16
10.0	Delivery Schedule. ....	17
11.0	Government Furnished Equipment and Information (GFE / I) .....	19
12.0	Security and Privacy .....	19
13.0	Position Sensitivity .....	20
14.0	Key Personnel.....	21
15.0	Performance Requirements Summary .....	23

# Rapid Appeals Modernization Program

## Performance Work Statement

### 1.0 Introduction

The Department of Veterans Affairs (VA) is actively looking for ways to put Veterans in control of how they receive services and interact with VA. Modernization efforts are occurring across the Department to include changes to how Veterans' disagreements with decisions on benefit claims are resolved. On August 23, 2017, the President signed into law the Veterans Appeals Improvement and Modernization Act of 2017 (Appeals Modernization Act; Public Law 115-55), creating a new claims and appeals process for resolving disagreements on VA's decisions on benefits claims. The new process provides Veterans streamlined choices for seeking review of VA's decision.

While the law will not be fully implemented until February 2019, in an effort to provide some of the benefits of the new law's streamlined process, VA initiated the Rapid Appeals Modernization Program (RAMP). This initiative allows participants the option to have their decisions reviewed in the Higher-Level Review or Supplemental Claim lanes, as outlined in the new law. Participation in RAMP is voluntary and by invitation only; however, eligible Veterans can expect to receive a review of VA's decision on their claim much faster in RAMP than if they were to remain in the legacy appeals process. The RAMP initiative began on November 1, 2017 with the initial mailing of RAMP Opt-In letters sent to Veterans with some of the oldest pending appeals and will continue until the new law is fully implemented no earlier than February 2019. Table 1 details the projected monthly mailing volumes of RAMP Opt-In letters associated with this task:

**Table 1. Projected Monthly Mailing Volumes of RAMP Opt-In Letters**

Month of Mailing	Volume of Opt-In Letters
November 2017	500
December 2017	5,000
January 2018	10,000
February 2018	25,000
March 2018	25,000
April 2018	30,000
May 2018	30,000
June 2018	30,000
July 2018	30,000
August 2018	30,000
September 2018	30,000
October 2018	30,000
November 2018	30,000
December 2018	30,000
January 2019	30,000
<b>TOTAL</b>	<b>365,500</b>

## Rapid Appeals Modernization Program

### 2.0 Scope

The scope of this Performance Work Statement encompasses personnel and staffing services to efficiently and effectively fulfill the Agency's goals and objectives of the RAMP initiative. Specifically, the Contractor shall provide experienced personnel to assist VA in:

- Performing outbound RAMP-related calls to pre-selected qualified Veterans utilizing a Government-provided list containing the Veterans names and contact numbers
- Disseminating RAMP initiative detailed information utilizing a Government-provided script
- Documenting and reporting of all call outcomes
- Directing Veterans who have additional questions unrelated to the RAMP initiative to the appropriate VA National Call Center (NCC) for further assistance

Accepting inbound calls or other communications from Veterans is out of scope of this task. In addition, no Contractor-completed Appeals development actions related to the RAMP initiative calls will be required.

The overall volume of RAMP calls associated with this task is estimated to be approximately 446,000 calls. This estimate is comprised of 365,500 initial (Category 1) calls (one (1) call per RAMP letter sent), 73,100 first follow-up (Category 2) calls, and 7,310 second and final attempt (Category 3) calls. Category 2 and 3 calls are anticipated due to expected unsuccessful initial calls as depicted in Table 2, Projected Call Volumes. The Government guarantees a minimum of 300,000 required outgoing RAMP calls during the period of performance.

**Table 2. Projected Call Volumes by Category**

Category	Estimated Volume
Category 1	365,500
Category 2	73,100
Category 3	7,310
<b>Total Calls</b>	<b>445,910</b>

### 3.0 Period of Performance

This is a Firm-Fixed Price (FFP) contract consisting of a 12-month period of performance (PoP). The anticipated award date is April 13, 2018 with an effective period of performance from April 14, 2018 through April 13, 2019.

## **Rapid Appeals Modernization Program**

Following award the Contractor shall use this time to on-board employees, initiate background checks, and secure a place of performance. The Contractor shall begin making required calls to Veterans no later than 30 calendar days following award.

### **4.0 Place and Hours of Performance**

All work shall be completed at the Contractor's facility, which shall be located within the Continental United States (CONUS).

While the Government does not prescribe the place of performance or the construction standards to be met, there are physical facility considerations that must be addressed. These considerations include security aspects in relation to the Government Furnished Information, as well as privacy aspects associated with verbal communications with Veterans or their dependents as described in Section 12.0 of this PWS, Security and Privacy.

The Contractor is not required to use a specific class of office space (e.g., Class A, Class B, or Class C). While the use of non-Class A office space is not precluded by the Government, security and privacy considerations must be addressed, and the Government reserves the right to inspect any proposed facility to ensure it is acceptable for use under this contract. Such space shall:

- Be dedicated solely to the performance of the requirements outlined in this PWS
- Provide controlled access to ensure only authorized personnel are allowed unescorted entry
- Include construction that ensures security from penetration above the ceiling and below the floors
- Include coverings on any windows / glass that would prevent visibility of computer screens / documents containing Veteran information from outside the secure area

The Contractor shall staff overall call operations during the core hours of 8:00 AM to 9:00 PM Eastern Time (ET), five (5) business days per week (Monday through Friday). The Contractor shall ensure no calls are placed outside of the prescribed core hours based on the Veterans' local times (8:00 AM to 6:00 PM).

The Government does not require weekend work in support of this contract. Weekend work will be left to the discretion of the Contractor with approval by the Government. However, if the Contractor elects to perform weekend work, the Government will not pay a premium for this work.

Work at the Contractor site shall not take place on Federal holidays unless directed by the Contracting Officer. Contractor Deliverables due on Federal holidays will be due the first business day following the holiday. Estimated award date is February 28, 2018; however, the Contracting Officer reserves the right to adjust the actual award date.

## **Rapid Appeals Modernization Program**

There are ten Federal holidays set by law (5 U.S.C. § 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, the preceding Friday is observed as a holiday. Similarly, if one falls on a Sunday, the holiday is observed on the proceeding Monday. The remaining six (6) holidays are set by a specific day of the week and month:

Martin Luther King's Birthday	Third Monday in January
Washington's Birthday	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

### **5.0 Travel**

The Government anticipates limited travel to perform the tasks associated with the effort, as well as to attend program-related meetings or conferences throughout the period of performance. Travel costs will not be paid for travel within 50 miles of the Washington, DC commuting area. Travel costs will be paid through the firm-fixed price travel line item, not through direct reimbursement by the Government.

The total estimated number of trips in support of the program related meetings for this effort is two (2) two (2) - day trips to Washington, DC (one trip during the kick-off and one (1) trip during the middle of the period of performance). The Government estimates the Contractor will include four (4) personnel to attend the kick-off meeting and two (2) personnel for the remaining mid-performance period trip. Anticipated locations include the following:

- Veterans Benefits Administration (VBA), 1800 G Street, NW, Washington, DC 20006

Travel is for the duration of the period of performance.

## **Rapid Appeals Modernization Program**

### **6.0 Task Statements**

#### **6.1 Project Management**

##### **6.1.1 Contractor Project Management Plan (PMP)**

The Contractor shall provide a detailed Project Management Plan (PMP) and briefing for the project team which presents the Contractor's plan for completing all tasks described within this PWS. The Contractor shall submit a draft PMP during the kick-off meeting, required within seven (7) calendar days following contract award. The Government will provide comments back to the Contractor, via the COR, within five (5) calendar days following delivery of the draft PMP to the Government. The Contractor will then have five (5) calendar days following receipt of the Government's comments to revise and submit a final PMP to the Government.

The Contractor's plan shall be responsive to this PWS and describe, in detail, the approach to be used to address the tasks outlined including, but not limited to:

- Project Start-up Activities
- Staffing
- Training
- Communications Plan
- Risk Mitigation

The Contractor shall plan, monitor, and control the tasks outlined in this PWS. The Contractor shall follow an accepted project management methodology such as the Project Management Body of Knowledge (PMBOK). The PMP shall address the Contractor's overall Quality Assurance Plan (QAP) and how it will be applied throughout execution of the contract. The Contractor shall keep the PMP up to date throughout the period of performance, and update when necessary as changes occur.

The contractor shall provide all management services in support of the task, including program management, information and relationship management, human resources management, performance management, quality assurance / quality improvement, and management reports. The Contractor shall provide program management for the life of the contract through an assigned Project Manager. The Project Manager shall:

- Provide supervisory / management personnel required for effective project management.
- Ensure that all requirements are performed and deliverables are submitted per agreed upon schedules
- Communicate effectively with the VA Project Manager and COR as needed

## **Rapid Appeals Modernization Program**

- Effectively balance and schedule involvement of appropriate resources throughout the contract
- Utilize project metrics to track, manage, and analyze the project and communicate findings to the COR and VA Project Manager to ensure appropriate focus on critical attention areas
- Identify opportunities for process improvements
- Anticipate project challenges and risk scenarios and prepare, lead, and execute proactive mitigation strategies to ensure optimal results
- Drive internal and external reviews as required
- Serve as the single point of contact for performance related questions
- Manage and monitor the components for project execution including developing and planning resource assignments and allocations, developing program status reports and project reviews, and managing and tracking submission of deliverables

### **Deliverables:**

A. Contractor Project Management Plan

#### **6.1.2 Contract Kick-Off and Recurring Status Meetings**

Within seven (7) calendar days of contract award, unless otherwise specified by VA, the Contractor shall attend an in-person contract kick-off meeting at VBA Central Office at 1800 G St., NW, Washington, DC, 20006. At the kick-off meeting, the CO and COR shall review the contract requirements with the Contractor as well as information relevant to contract performance. The Contractor shall facilitate a detailed presentation to VBA regarding its approach to perform the requirements of the contract. The Contractor shall provide a read ahead two (2) business days prior to scheduled Kick-Off Meeting. The Contractor shall deliver meeting minutes within three (3) business days following the kick-off meeting.

On a weekly basis and on a date determined by VBA, the Contractor shall coordinate, attend, and facilitate a weekly status meeting. The weekly status meeting may be conducted virtually. At the meeting, the Contractor shall update the Government PM / COR of current contract status, risks, issues, work and deliverables expectations prospective to the next 30 calendar days in the contract schedule. The Contractor shall deliver weekly status meeting minutes within three (3) business days following the weekly status meeting.

### **Deliverables:**

- A. Kick-Off Meeting and Presentation
- B. Kick-Off Meeting Minutes
- C. Weekly Status Meeting
- D. Weekly Status Meeting Minutes



## Rapid Appeals Modernization Program

### 6.2 RAMP Call Operations

To prevent delay in initiating calls to Veterans, the Contractor shall, upon contract award, occupy a “turn-key” facility containing sufficient capacity suitable to accomplish all contract requirements outlined in the PWS. For the purposes of this PWS, “turn-key” is defined as having a facility and equipment in place, meeting all the requirements listed in the PWS, ready for immediate use. The Contractor’s facility shall operate in accordance with all Federal and State laws and regulations for call center operations. The facility shall accommodate staffing to include at minimum: supervisors, managers, call agents, quality assurance personnel, and VA personnel. The Contractor shall also conduct routine daily monitoring of calls.

The Contractor shall initiate RAMP-related outbound calls beginning at precisely **8:00 AM ET** and continue until no later than **9:00 PM ET**. The Contractor shall ensure all Contractor-directed pre-shift activities are completed prior to 8:00 AM ET. In addition, outbound calls to Veterans shall not occur outside of the hours of **8:00 AM to 6:00 PM** based on the Veterans’ local time zone. The Contractor shall include in its proposal call agent shift times, if implemented, across the core hours.

The Contractor shall utilize a Government - provided monthly list containing the Veterans’ name and contact information of those Veterans to be called. As the Government began sending Veterans RAMP letters beginning in November 2107, the Contractor will be provided an initial list of Veterans that have received letters beginning in November 2017 through time of Contract award. Thereafter, the lists will be provided in accordance with Section 11.0 of the PWS, Government Furnished Equipment / Information. For proposal purposes only, the Government estimates between a minimum of 19,000 and a maximum of 55,000 monthly RAMP calls will be required in support of this task.

The Contractor shall utilize Government – provided scripts and an accompanying Frequently Asked Questions (FAQ) reference document in the conduct of calls to Veterans. The scripts and FAQ document will be provided in accordance with Section 11.0 of the PWS, Government Furnished Equipment / Information. Any changes to the call scripts and / or FAQ will be made by the Government and provided to the Contractor via formal change notice. Changes to call scripts and subsequent call agent training shall be completed within two (2) business days following receipt of new scripts and change notice from VA.

The Contractor’s phone system “Caller ID Name” feature shall be set to display both the Contractor phone number from which the call is originating and “Department of Veterans Affairs” on the caller ID display of the Veteran being called.

The Government estimates that a typical RAMP call will average six (6) minutes in duration. This average call time includes the time necessary to record the outputs for each defined below.

## **Rapid Appeals Modernization Program**

The Government may require increased RAMP outreach volume to further increase the number of Veterans to be called. The Government agrees to provide a minimum of 48 hours advance notice to the Contractor before any changes in call volumes are expected.

The Contractor shall ensure all call agents are fluent English speakers, writers, and readers. In addition, to accommodate Veterans whose primary language is Spanish, the Contractor shall have at least one (1) fluent Spanish speaking call agent available at all times during the core hours of operation prescribed in Section 4.0, Place of Performance, of this PWS.

The Contractor's contact system shall support individuals who are hearing impaired that will be using appropriate teletypewriter (TTY) / telecommunication device for the deaf (TDD) or other industry leading solutions.

The Contractor shall document the outputs of its calls electronically, in a data file to be provided to the Government daily for all calls made during the prior day. The Government will work with the Contractor to define the needed information content to be captured, but at minimum the following information shall be included:

- Veteran Name
- Veteran Phone Number
- Time of Initial Contact Attempt
  - Successful
  - Unsuccessful
- Time of Follow-up Contact Attempt(s)
  - Successful
  - Unsuccessful
- Total Number of Call Attempts per Veteran
- End Time of Contact / Follow-up Contact
- Opt In / Opt Out Decision
- Any other information provided by the Veteran
- Daily Total Number of Call Attempts (all Veterans)
- Daily Total Number of NCC Soft Transfers

VA will use this data file to generate various standard forms in its systems to capture a record of the call that was conducted and any discussions with the individuals.

The Contractor shall also separately maintain recordings of all calls. The Contract shall, in keeping with industry standards and best practices, notify the Veteran that calls are being recorded.

## Rapid Appeals Modernization Program

### Non-RAMP Related Calls

The Government anticipates Veterans, on occasion, will request information outside of the scope of this contract during the course of a RAMP call with the Contractor. If, during a RAMP call, the Veteran requires additional assistance related to his / her appeal, the contractor call agent shall soft-transfer the call to VA NCC representatives for processing. For the purposes of this PWS the term “soft-transfer” means the RAMP call agent transfers the current call to the NCC call queue. The Government anticipates approximately 500 calls each month that require transfer to the VA NCC. There is no expectation that the call agent remains on the line until the soft-transfer is answered by the VA NCC agent.

Prior to any soft-transfer to the NCC, the Contractor shall provide the Veteran with the NCC phone number in the event the soft-transfer is unsuccessful. The NCC phone number to be provided is 1-800-827-1000

The Contractor shall refer calls for any individuals experiencing crises (such as potential suicidal thoughts), to the Veterans crisis line via a warm-transfer. For the purposes of this PWS, the term “warm-transfer” means the RAMP call agent speaks with the NCC agent before the call is transferred. The RAMP call agent shall provide the NCC representative information about the caller’s issue and give any background information before transferring the call (without the caller hearing). Then, all three parties may speak together. The Contractor shall remain on the line until a NCC representative assumes the call with the Veteran.

**Performance Standard:** The Contractor’s facility shall be online and fully operational to support RAMP - related outbound calls **99%** of the time during the core hours of 8:00 AM to 9:00 PM Eastern Time (ET), five (5) business days per week (Monday through Friday).

### Deliverables:

A. Daily call output data file

### 6.3 QA of RAMP Calls

The Contractor shall provide continuous monitoring of RAMP calls throughout any period of performance during which Task 6.2 is performed.

The Government will review the Monthly Status Report submitted by the Contractor and randomly select five (5) recorded telephone calls per employee for Contractor internal quality assurance review. The Contractor shall utilize a Government-provided Contractor Quality Master Scorecard to ensure appropriate quality measures are met. Quality review measurements shall, at minimum, include:

- Greeting and close
- Communication skills (i.e.; clarity, tone, and professionalism)
- Technical accuracy

## Rapid Appeals Modernization Program

- Efficiency of managing time and call flow

The Contractor shall provide the results of their QA reviews to the Government. The Government validates two (2) of the self-reported quality results for each call agent. If the validation of two (2) of the five (5) calls is **92%** or better, the contractor's quality is validated and the entire sample is not reviewed. If the Government validation falls below **92%** the entire sample is reviewed. The Government validation is the basis of determining compliance with the established performance standard for RAMP calls. The Contractor may dispute any findings within 10 business days of receiving notification of the Government's results. Table 3 establishes the Government prescribed QA review timeline for reviews following the end of each production reporting period.

**Table 3. QA Timeline**

<b>Quality Review Actions</b>	<b>Actions Due</b>
Contractor Monthly Status Report Due	Within five (5) business days of the end of the production month
Government provided random sample list distributed to Contractor	Within two (2) business days following receipt of Contractor Monthly Status Report
Contractor QA review results due to Government	Within 10 business days of receipt of Government provided random sample list
Government performs review of the Contractors results	Within five (5) business days of receiving the Contractor's results

In addition to the required monthly QA of RAMP Calls described above, the Contractor shall also perform internal weekly QA reviews of each call agent's performance during the reporting period. The Contractor shall utilize the same Contractor Quality Master Scorecard for the weekly QA reviews as is used for the formal monthly reviews conducted. The contractor shall:

- Monitor each call agent's performance at least one (1) time per week (random and unannounced) for the duration of any period of performance.
- Provide performance results, completed Contractor Quality Master Scorecard and summary reports to the Government's Project Manager / COR on a weekly basis.
- Retrain or release expeditiously from the project employees who do not meet acceptable customer service standards.

The Contractor shall ensure that a closed space is made available for the conduct of silent phone monitoring by VBA and Contractor QA resources. The Contractor shall provide all necessary IT equipment for call monitoring. The silent call monitoring space shall accommodate no less than two (2) personnel at the same time. Government silent monitoring will include both announced and unannounced monitoring periods.

## **Rapid Appeals Modernization Program**

### **Deliverables:**

A. Weekly Contractor Quality Master Scorecard Report

### **7.0 General Requirements**

- 7.1** The Contractor shall commence the operational performance of Tasks 6.2 and 6.3 within 30 calendar days of contract award.
- 7.2** The Contractor shall have a site manager / supervisor onsite at all times during the core operational hours as prescribed in Section 4.0, Place of Performance.
- 7.3** The Contractor shall utilize a Contractor-created / maintained Secure File Transfer Protocol (SFTP) solution used for transmitting VA sensitive information between the Contractor and the Government. The SFTP shall be used to transmit the Government – provided monthly list to the Contractor, the daily call output list from the Contractor to the Government, as well as weekly / monthly reports as required by the PWS. The SFTP may also be used to support access to voice recorded calls required for quality assurance purposes. The use of Contractor corporate email accounts shall not be authorized for this purpose, nor shall any PII or PHI ever be transmitted via Contractor corporate or personal email accounts. The Contractor shall consult the Government PM and / or COR where a question arises regarding this requirement.
- 7.4** The Contractor shall, within 30 calendar days from contract award, provide full-time space for one (1) VBA resource. Full-time space shall include space for a computer workstation with both network and phone (with outbound calling capability) access and shall be situated in a manner allowing for uninterrupted teleconferences between the VBA employee(s) and VA Leadership. The Contractor shall provide the full-time workspace for the duration of the contract performance period. The VBA resource shall have physical access to the facility such that reviews of any process may be executed on an at-once basis as may be directed by VA. The Contractor shall ensure that the provided workspace is located within a climate-controlled space accessible through similar security measures as the Contractor's employees.
- 7.5** The contractor shall provide qualified personnel to perform the tasks outlined in this PWS.
- 7.6** The Contractor shall provide all recruiting, screening, hiring, and monitoring of staff for all tasks outlined in this PWS. The Contractor shall ensure confidentiality of data and conduct security background checks for each employee prior to employee performance of tasks on behalf of VA.
- 7.7** The Contractor shall verify United States citizenship for all supervisors, managers, call agents, and quality assurance personnel.
- 7.8** The Contractor shall ensure all supervisors, managers, and quality assurance personnel are fluent English speakers, writers, and readers. In addition, to

## Rapid Appeals Modernization Program

accommodate Veterans / claimants whose primary language is Spanish, the Contractor shall have at least one (1) fluent Spanish speaking resource available at all times during the core hours of operation prescribed in Section 4.0, Place of Performance, of this PWS.

- 7.9** Any printed materials, computer screen prints, or any other handwritten or computer generated material containing veteran information, shall be handled in accordance with *Department of Veterans Affairs, VBA Directive 6300, Records Management Information, dated September 23, 2016*. The Government will provide a sufficient quantity of the required “red boxes” referenced in the above Directive 6300 following contract award and prior to initiating Tasks.

### 8.0 Reporting

VA uses a variety of reports to support business decisions and review workflow performance. Reports are used to inform executives and provide metrics that allow authorized VA business users, system administrators and leadership to view data necessary to apply appropriate workload considerations to respond effectively and efficiently to pending Veteran claims.

The Contractor shall develop a limited number of performance-based ad hoc reports on a monthly or quarterly basis as business needs arise. For the purposes of this PWS, “ad-hoc” reports are defined as those occasional reports VA requires to respond, in real-time, to non-routine questions that cannot be answered by routine reports. The Contractor shall ensure that the ad hoc report data are current, accurate, and complete as of the date of submittal to the Government. To the extent possible, ad-hoc reports shall be based in real-time and be configurable to support the sorting of resulting data and data elements.

Ad hoc reports may become the basis for the creation of routine reports or data elements for transfer over time as may be directed by VA. The Contractor shall develop an ad-hoc report request template to be utilized by VA when requesting ad-hoc reports. All ad-hoc report requests will be initiated via the assigned COR and will include a formalized request with detailed parameters. The Contractor should anticipate no more than three (3) requests per month for the creation of ad hoc reports. For the purpose of estimation, the level of effort for researching, formatting, editing, and delivering each ad hoc report is anticipated to require no more than one (1) full time equivalent (FTE) for two (2) days. Where the Contractor’s performance falls below any acceptable level as defined in this PWS, any of the weekly, monthly, or ad hoc reports listed may be required to be delivered on a daily basis until performance of the specified area returns to an acceptable level, or, until the Government is satisfied that any actions taken to rectify less than acceptable performance will resolve deficient performance.

Ad hoc report data shall be exportable to the Microsoft suite of Office tools, and more specifically shall be accessed for additional analysis via Microsoft Excel. All ad hoc reports shall be thoroughly documented and made available to VBA to support the analysis and possible development of additional routine reports.

## **Rapid Appeals Modernization Program**

VA is providing a basic description of the predefined reports listed below, its purpose, and the minimum data elements for each. The Contractor shall utilize this information as a baseline of required data elements.

At minimum, the Contractor shall create the following predefined reports:

- Weekly Status Report
- Monthly Status Report
- Monthly Quality Review Report with Supporting Data

### **8.1.1 Weekly Status Report**

The Contractor shall generate and submit to the Government a consolidated weekly status report of all RAMP calls and other task details due no later than the close of business on the second (2<sup>nd</sup>) business day of the week following the reporting period. The Weekly Status Report shall include at minimum the following data elements reported as a weekly cumulative volume and by day of week volume:

- Contract Name and Number
- VA COR and Program Manager Names
- Project Manager Name
- Valid “as of” Date
- Date Range
- Number of RAMP calls initiated by Category (Cat-1, Cat-2, and Cat-3)
  - Number of successful contacts
    - Number of calls transferred to VA NCC agent
  - Number of unsuccessful contacts
    - Number due to no answer (includes an answered call but Veteran unavailable to discuss with Call Agent)
    - Number due to phone number no longer valid
    - Number due to Veteran not at listed phone number
- Program Issues and Statuses
  - o System Outages
    - Identified outages for the reporting period
    - Actual outages for the reporting period
  - o Clearance Processes
    - Number of staff with background clearances completed
    - Number of staff pending background clearances
  - o Logistics
  - o Training
- Description of the types of questions frequently asked by the Veteran and the types of questions the Contractor is unable to answer

Description of the types of questions frequently asked by the Veteran and the types of questions the Contractor is unable to answer

## **Rapid Appeals Modernization Program**

### **8.1.2 Monthly Status Report**

The Contractor shall generate and submit to the Government a consolidated monthly status report of all RAMP calls and other task details due no later than the close of business on the fifth (5<sup>th</sup>) business day of the month immediately following the reporting period.

The Monthly Status Report shall include the same data elements as the Weekly Status Report above submitted during the reporting month.

### **8.1.3 Monthly Quality Review Report and Supporting Data**

The Contractor shall generate and submit to the Government a consolidated monthly internal quality review report of all RAMP calls due no later than the close of business on the fifth (5<sup>th</sup>) business day of the month immediately following the reporting period. The Contractor shall provide VA with continuous access to the internal quality control information, to include call-specific quality review documentation and findings. The monthly internal quality review report shall include at minimum the following supporting data elements:

- A complete list of all calls reviewed for the prior production month for internal quality control and the results of each review.
- The prior month's internal accuracy percentage
- A monthly running cumulative average

#### **Deliverables:**

- A. Weekly Status Reports
- B. Monthly Status Reports
- C. Monthly Quality Review Reports and Supporting Data

## **9.0 Training**

The contractor shall, in accordance with Contact Center industry best practices develop, train, and maintain required staffing during periods of performance, including replacement Call Agents or supervisory / management personnel due to attrition.



## Rapid Appeals Modernization Program

### 10.0 Delivery Schedule.

Task	Deliverable	Quantity	Delivery Date
6.1.1	<b>A.</b> Contractor Project Management Plan and Briefing  <b>NOTE:</b> Required delivery is via electronic submission to the CO and COR	<b>A.</b> One (1) Initial PMP and three (3) Quarterly PMP Updates during the base period of performance	<b>A.</b> Initial draft PMP due within ten (10) calendar days following contract award; with final draft due within 10 calendar days following receipt of Government edits to draft PMP; quarterly thereafter
6.1.2	<b>A.</b> Kick-Off Meeting and Presentation  <b>B.</b> Kick-Off Meeting Minutes  <b>C.</b> Weekly Status Meeting  <b>D.</b> Weekly Status Meeting Minutes  <b>NOTE:</b> Required delivery is via electronic submission to the CO and COR	<b>A.</b> One (1) Kick-Off Meeting and Presentation  <b>B.</b> One (1) Kick-Off Meeting Minutes  <b>C.</b> 52 Weekly Status Meetings during the base year  <b>D.</b> 52 Weekly Status Meeting Minutes during the base year	<b>A.</b> Within seven (7) calendar days following TO award  <b>B.</b> Within three (3) business days following kick-off meeting  <b>C.</b> A date to be determined by the Government  <b>D.</b> Within three (3) business days following any weekly status meeting

## Rapid Appeals Modernization Program

6.2	<b>A.</b> Daily Call Output Data File	<b>A.</b> 240 Daily Output Data Files	<b>A.</b> No later than 10:00 AM on the first (1 <sup>st</sup> ) business day following the reporting day
6.3	<b>A.</b> Weekly Contractor Quality Master Scorecard Reports	<b>A.</b> 52 Weekly Contractor Quality Master Scorecard Reports	<b>A.</b> No later than the close of business on the first (1 <sup>st</sup> ) business day of the week following the reporting period
8.0	<b>A.</b> Weekly Status Reports  <b>B.</b> Monthly Status Reports  <b>C.</b> Monthly Quality Review Reports and Supporting Data  <b>NOTE:</b> Required delivery is via	<b>A.</b> 52 Weekly Status Reports  <b>B.</b> 12 Monthly Status Reports  <b>C.</b> 12 Monthly Quality Review Reports and Supporting Data	<b>A.</b> No later than the close of business on the first (1 <sup>st</sup> ) business day of the week following the reporting period  <b>B.</b> No later than the close of business on the third (3 <sup>rd</sup> ) business day of the month immediately following the reporting period.  <b>C.</b> No later than the close of business on the third (3 <sup>rd</sup> ) business day of the month immediately following the

## Rapid Appeals Modernization Program

	electronic submission to the CO and COR		reporting period.
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### 11.0 Government Furnished Equipment and Information (GFE / I)

The Government will provide detailed phone call scripts to be utilized by the Contractor in the performance of this task. The Government will also provide the Contractor with an accompanying Frequently Asked Questions (FAQ) document to be referenced in the conduct of calls to Veterans. Call scripts and FAQ document will be provided upon contract award.

The Government will provide access to subject matter experts (SME), policy materials, and requested policy-related guidance needed in support of this task. The Government will not, however, specifically create or provide training to the Contractor to make calls.

The Government will provide data files (e.g., Comma Separated Variable, Excel, etc.) with lists of Veterans to be called and their contact information as well as other contents mutually agreed to by the Government and the Contractor. The Government may update the formats of these data files throughout performance if additional information needs to be provided. The Government will provide the initial data file upon notification and validation from the Contractor that cleared personnel are ready to begin placing calls to Veterans. Thereafter, data files will be delivered to the Contractor on a monthly basis, no later than the second business day of the month. To ensure duplicate Veteran entries are not included, the Contractor shall, upon receipt, review and validate against previous data files that duplicate Veteran entries are not included. This will ensure additional, erroneous calls are not placed to Veterans. Any discrepancies noted by the Contractor shall be immediately directed to the Government PM and COR for resolution.

The Government will provide the Quality Master Scorecard to be utilized by the Contractor while performing QA of RAMP calls.

The Government will not furnish customer relationship management (CRM), telephony or other systems used to make calls. Instead, the Government expects the Contractor to provide full-service operation including the equipment; software; phones; and all computer and telecommunication-related lines and cable needed in the performance of this task.

### 12.0 Security and Privacy

All VA-provided data shall be stored and accessed on Contractor-provided equipment. No data may be stored, sent to, or accessed outside the Continental United States (CONUS). A breach of this term may be the basis for a termination by default at the VA's sole discretion.

## Rapid Appeals Modernization Program

### 13.0 Position Sensitivity

<b>Position Sensitivity</b>	<b>Background Investigation</b> (in accordance with Department of Veterans Affairs 0710 Handbook, "Personnel Suitability and Security Program," Appendix A)
<b>Low / Tier 1</b>	<b>Tier 1 / National Agency Check with Written Inquiries (NACI)</b> - A Tier 1/NACI is conducted by OPM and covers a five-year period. It consists of a review of records contained in the OPM Security Investigations Index (SII) and the DOD Defense Central Investigations Index (DCII), FBI name check, FBI fingerprint check, and written inquiries to previous employers and references listed on the application for employment. In VA it is used for Non-sensitive or Low Risk positions.
<b>Moderate / Tier 2</b>	<b>Tier 2 / Moderate Background Investigation (MBI)</b> - A Tier 2/MBI is conducted by OPM and covers a five-year period. It consists of a review of National Agency Check (NAC) records [OPM Security Investigations Index (SII), DOD Defense Central Investigations Index (DCII), FBI name check, and a FBI fingerprint check], a credit report covering a period of five years, written inquiries to previous employers and references listed on the application for employment; an interview with the subject, law enforcement check; and a verification of the educational degree.
<b>High / Tier 4</b>	<b>Tier 4 / Background Investigation (BI)</b> - A Tier 4/BI is conducted by OPM and covers a 10-year period. It consists of a review of National Agency Check (NAC) records [OPM Security Investigations Index (SII), DOD Defense Central Investigations Index (DCII), FBI name check, and a FBI fingerprint check report], a credit report covering a period of 10 years, written inquiries to previous employers and references listed on the application for employment; an interview with the subject, spouse, neighbors, supervisor, co-workers; court records, law enforcement check, and a verification of the educational degree.

The position sensitivity and the level of background investigation commensurate with the required level of access for the following tasks within the PWS are:

	<b>Position Sensitivity and Background Investigation Requirements</b>		
<b><u>Task / Subtask Number</u></b>	<b>Tier1 / Low / NACI</b>	<b>Tier 2 / Moderate / MBI</b>	<b>Tier 4 / High / BI</b>
Task 6.1	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

## Rapid Appeals Modernization Program

Subtask 6.1.1	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Subtask 6.1.2	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Task 6.2	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Task 6.3	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Subtask 6.3.1	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Subtask 6.3.2	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

The Tasks, Subtasks, Optional Tasks, and Optional Subtasks identified above and the resulting Position Sensitivity and Background Investigation requirements identify, in effect, the Background Investigation requirements for Contractor personnel, based upon the tasks the individual will be working. The submitted Contractor Staff Roster must indicate the required Background Investigation Level for each Contractor individual based upon the tasks the Contractor individual will be working, in accordance with its submitted proposal.

### 14.0 Key Personnel

These skilled, experienced professional and / or technical personnel are essential for successful contractor accomplishment of the work to be performed under this contract. These are defined as key personnel and are those persons whose résumés were submitted. The Contractor agrees that the key personnel shall not be removed, diverted, or replaced from work without prior notification to the CO, COR, and VA PM.

Any personnel the Contractor offers as substitutes shall have the ability and qualifications equal to or better than the key personnel that are being replaced. Requests to substitute personnel shall be approved by the COR and CO. All requests for approval of substitutions in personnel shall be submitted to the COR and the CO at least 30 calendar days prior to making any change in key personnel. The request shall provide a detailed explanation of the circumstances necessitating the proposed substitution. The Contractor shall submit a complete résumé for the proposed substitute and any other information requested by the CO needed to approve or disapprove the proposed substitution. The CO will evaluate such requests and promptly notify the contractor of approval or disapproval thereof in writing.

The following are designated as Key Personnel for the purposes of supporting this task:

- Project Manager
- Call / Contact Center Operations Manager
- Call / Contact Center QA Manager

The contractor Project Manager, Call / Contact Center Operations Manager / Supervisor, and Quality Assurance Manager are designated as Key Personnel for the purposes of supporting this task. These skilled experienced professional and / or technical personnel are essential for successful Contractor

## **Rapid Appeals Modernization Program**

accomplishment of the work to be performed under this contract. These are defined as key personnel and are those persons whose résumés were submitted. The Contractor agrees that the key personnel shall not be removed, diverted, or replaced from work without approval of the CO and COR. All proposed substitutes shall meet or exceed the qualifications of the person being replaced.

The minimum qualifications for the Key Personnel are as follows:

- Project Manager
  - No less than 10 years of experience in project management
  - Possesses a Bachelor's Degree or higher
  - Experience with call / contact center operations
  - Experience managing a project of similar size and scope
- Call / Contact Center Operations Manager
  - No less than (2) years of experience with call / call center operations
- Call / Contact Center QA Manager
  - No less than (2) years of experience with quality assurance programs

## Rapid Appeals Modernization Program

### 15.0 Performance Requirements Summary

The table below defines the Performance Standards and Acceptable Performance Levels for Objectives associated with this effort.

Applicable PWS Paragraphs – (Paragraph #)	Required Service – (Performance Requirements)	Standard – (Performance Standards)	Maximum Allowable Degree of Deviation Requirement – Acceptable Performance Level (APL)	Method of Surveillance (Quality Assurance)	Outcomes
Subtasks 6.1.1, 6.1.2, 6.2, 6.3, and 8.0.	RAMP deliverables: documentation adheres to standards, formats, and frequency contained in the PWS	<p>Deliverables are completed in an accurate and timely manner.</p> <p>Deliverables are complete and accurate.</p>	No more than one (1) late document per quarter and no more than five (5) business days late. No more than two (2) sets of corrections required on any product, and all corrections submitted by the negotiated suspense.	<p>100% inspection.</p> <p>Quarterly Performance Based Service Assessment Survey – Customer satisfaction as measured through customer comments and feedback</p>	<p>Rework of deliverable and document performance in Contract Performance, Assessment, and Reports System (CPARS). Poor performance may result in issuance of a Contractor Discrepancy Report (CDR).</p> <p>The Government will not pay for services that do not conform or do not meet performance standards, or have not been properly rendered. The Vendor shall be given an opportunity to correct non-conforming services at no cost to the Government.</p> <p>The Vendor shall not invoice until email confirmation from the COR accepting the service has been provided.</p> <p>Where there are repeat issues of non-conformance to the performance standards, the Government may document substandard performance as negative past performance.</p>

## Rapid Appeals Modernization Program

Applicable PWS Paragraphs – (Paragraph #)	Required Service – (Performance Requirements)	Standard – (Performance Standards)	Maximum Allowable Degree of Deviation Requirement – Acceptable Performance Level (APL)	Method of Surveillance (Quality Assurance)	Outcomes
Task 6.2	Monthly operational status	Requires the Contractor's facility to be online and fully operational to support RAMP - related outbound calls <b>99%</b> of the time during the core hours of 8:00 AM to 9:00 PM Eastern Time (ET), five (5) business days per week (Monday through Friday during any reporting month.)	<b>99%</b> of the time	100% Inspection - Operational monitoring by use of system statistics and logs	Document performance in Contract Performance, Assessment, and Reports System (CPARS). Poor performance may result in issuance of a Contractor Discrepancy Report (CDR).
Subtask 6.3	RAMP Call Quality	Requires the Contractor to attain and maintain quality measurements as described in the PWS and respond professionally to Veterans while conducting RAMP calls	Accuracy rate is greater than or equal to <b>92%</b> monthly	Random Sampling	Retraining to restore accuracy and increased inspection to restore to Acceptable Performance Level  Document performance in Contract Performance, Assessment, and Reports System (CPARS). Poor performance may result in issuance of a Contractor Discrepancy Report (CDR).



## **Rapid Appeals Modernization Program**

The Government will utilize a Quality Assurance Surveillance Plan (QASP) throughout the life of the contract to ensure that the Contractor is performing the services required by this PWS in an acceptable manner. The Government reserves the right to alter or change the surveillance methods in the QASP at its own discretion. A Performance Based Service Assessment Survey will be used in combination with the QASP to assist the Government in determining acceptable performance levels.

## Rapid Appeals Modernization Program

### ADDENDUM A: ACRONYMS, TERMS, AND DEFINITIONS

Acronym / Term	Definition
APL	Acceptable Performance Level
BI	Background Investigation
CDR	Contractor Discrepancy Report
CO	Contracting Officer
COR	Contracting Officer Representative
CPARS	Contract Performance, Assessment, and Reports System
CRM	Customer Relationship Management
DCII	DoD Defense Central Investigations Index
DoD	Department of Defense
ET	Eastern Time
FBI	Federal Bureau of Investigation
FTE	Full Time Equivalent
GFE	Government Furnished Equipment
GFI	Government Furnished Information
IT	Information Technology
KM	Knowledge Management
LAN	Local Area Network
MBI	Moderate Background Investigation
NAC	National Agency Check
NACI	National Agency Check with Written Inquiries
NCC	National Call Centers
OPM	Office of Personnel Management
PM	Project Manager
PMI	Project Management Institute
PMBOK	Project Management Body of Knowledge
PMP	Project Management Plan
PoP	Period of Performance
QA	Quality Assurance
QAP	Quality Assurance Plan
QASP	Quality Assurance Surveillance Plan
QC	Quality Control
SIC	Security and Investigations Center
SII	Security Investigations Index
PWS	Performance Work Statement
VA	US Department of Veterans Affairs
VBA	Veterans Benefits Administration
VCIP	Veterans Claims Intake Program
VPN	Virtual Private Network
WBS	Work Breakdown Structure

## **Rapid Appeals Modernization Program**

### **List of Addendums and Attachments:**

#### **Addendums:**

##### **Addendum A: *Acronyms, Terms, and Definitions***

- Addendum A is incorporated into PWS.

#### **Attachments:**

##### **Attachment A: RAMP Call Script**

- Attachment A to be distributed separately.

##### **Attachment B: RAMP Frequently Asked Questions (FAQ)**

- Attachment B to be distributed separately.