



General Services Administration (GSA)  
Federal Acquisition Service (FAS)  
Assisted Acquisition Services (AAS) Region 9



Contract #TBD  
Acquisition ID # 47QFPA23R0001  
Analytic Task Order #1

Performance Work Statement

FY23 DEOCS Survey Development, Communication, and Logistics Support

**1.0 INTRODUCTION**

The Office of People Analytics (OPA) Health and Resilience (H&R) division requires support for the continued development and maintenance of the Defense Organizational Climate Survey (DEOCS).

**2.0 BACKGROUND**

The DEOCS is a continually-administered survey that supports decision-making military and civilian organization leaders within the DoD, by the Office of the Under Secretary of Defense (Personnel and Readiness) (OUSD [P&R]), other OSD organizations, and a wide variety of customers within the DoD. OPA requires support in maintaining survey analytic operations and implementing enhancements.

**3.0 SCOPE**

The contractor shall provide all personnel, management, supplies, and equipment necessary to perform the requirements outlined in this performance work statement. The objectives of this effort are to 1) support ongoing survey operations and analyses; 2) support planned enhancements to the survey administration portal, process, and instrument; 3) provide outreach and training to DEOCS users; 4) conduct and report predictive analyses, including designing risk indices and benchmarks; and 5) design and conduct analyses associated with the first Annual DEOCS Report. All the work described in the PWS should be conducted in close consultation with Government project managers and statisticians/methodologists.

**4.0 REQUIREMENTS**

The DEOCS will be administered online continuously throughout the period of performance. *The contractor shall:*

- 4.1 Provide all operational support activities required by the contract, including regular status meetings, requirements documentation, creating and maintaining project timelines and deadlines, creating meeting notes, tracking task



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completion, monthly progress reports, and the teleconference post-award kick-off meeting.

- 4.2 Provide support in implementing updates to the DEOCS 5.0 survey instrument and associated reporting, resulting from the streamlining efforts conducted in 2022 and the OMB review process, in support of the first annual DEOCS season in the summer-fall of 2023. All updates must be live when the fielding season begins in the summer of 2023.
  - 4.2.1 Provide support in updating the DEOCS survey instrument for CY2023 Annual DEOCS, aligned with the OMB approved version.
  - 4.2.2 Conduct a twenty record and fifty record check for survey instrument changes.
  - 4.2.3 Provide specifications and requirements for associated changes needed to the dashboard and reporting.
- 4.3 Conduct up to 150 hours of ad hoc research, analysis, and coordination needed to prioritize, identify, and implement identified quarterly and annual updates to the DEOCS survey, administration process, portal, dashboard, and reports.
- 4.4 Conduct user acceptance testing (UAT) for DEOCS enhancements implemented by DEOCS operations contractor. Planned enhancements that will require testing include but are not limited to link-off to the 2023 Workplace and Gender Relations (WGR). Testing will include an evaluation that all requirements were implemented satisfactorily and that the capability works under all necessary user scenarios. Work with the operations contractor to troubleshoot issues. Maintain the UAT exchange log. Track implementation of identified issues.
- 4.5 Process and manage DEOCS datasets.
  - 4.5.1 Process datasets received from operations contractor to include survey response datasets, registration files, calculation files, research block datasets, comments files, and quarterly customer feedback surveys.
  - 4.5.2 Make recommendations to improve data management and storage.
  - 4.5.3 Document content of datasets and processing steps.



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- 4.5.4 Create datasets to share with the Person-Event Data Environment (PDE), (the Army's analytics platform), and/or Advana (the DoD's analytics platform and assist with data transfer and ingest to the data sharing environments.
- 4.6 Maintain documentation for DEOCS data and statistical processes.
  - 4.6.1 Update the codebook for the 2023 DEOCS individual-level files. The codebook should apply to all the analysis files created for the DEOCS for January 2023 to January 2024. Contractors must build off the previous codebook to revise it to correspond to minor updates to the survey and registration made in the interim. Provide a draft codebook 9 months into the Period of Performance and a finalized codebook at the end of the Period of Performance.
  - 4.6.2 Create a codebook for the 2023 DEOCS unit-level files. The codebook should apply to all the unit-level files created for the DEOCS for January 2023 to January 2024. Provide a draft codebook 9 months into the Period of Performance and a finalized codebook at the end of the Period of Performance.
  - 4.6.3 Prepare the 2023 DEOCS methodology report following the format of prior methodology reports, and include any changes for the DEOCS. The report must describe all analyses used to produce the metrics reported in the unit-level reports presented in the DEOCS dashboard. The report must include enough detail that somebody could recreate the metrics in the unit-level reports from an individual-level dataset and contain the same level of detail typical of statistical methodology reports for other OPA surveys (i.e., Workplace Equal Opportunity Surveys and Workplace Gender Relations Survey). The report should also describe all eligibility criteria, suppression rules, and data disclosure guidelines. Provide a draft of the report 9 months into the Period of Performance, and the final report 12 months into the Period of Performance.
- 4.7 Create basic (public) use DEOCS dataset for DEOCS v5.0. The specifications for the datasets will be provided by the government and align with Disclosure Review Board decisions. Datasets will be created on a quarterly basis and provided to Advana and PDE.



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- 4.8 Following the government's standard operating procedures for data sharing requests, assist with processing requests for DEOCS data sharing. Anticipate approximately 5 data requests per month.
  - 4.8.1 Monitor and track requests received through Advana and PDE.
  - 4.8.2 Review requests to ensure all required documentation and information is present and complete and meets the standards set in the Standard Operating Procedure (SOP)..
  - 4.8.3 Provide an initial recommendation to the government for whether the request should be approved based on the SOP.
  - 4.8.4 Assist with obtaining all necessary approvals.
  - 4.8.5 When authorized by the government, grant access to DEOCS data through Advana and PDE.
- 4.9 Assist with fulfilling requests for DEOCS reports. OPA anticipates approximately 5 requests per month, with 1-5 reports per request. Rarely (approximately 4-5 times per year), requests may be larger, with hundreds of reports requested.
  - 4.9.1 Respond to requests for DEOCS reports from users. Users will submit requests via email and contractor will get concurrence from Service POC on release, download report from DEOCS portal, and provide to requestor via Secure File Transfer Protocol (SFTP).
  - 4.9.2 In response to Freedom of Information Act (FOIA) requests, download requested reports from DEOCS portal and provide to OPA staff who will review and respond to the request.
- 4.10 Provide limited outreach and training support for DEOCS.
  - 4.10.1 Update screencasts to account to correspond to any DEOCS registration, administration, instrument, or dashboard/reporting changes. No live virtual trainings will be conducted.
  - 4.10.2 Update and create help information, including informational documents, website content, Frequently Asked Questions (FAQs), users guides, and quick links, posted to public and private sites (e.g., [defenseculture.mil](http://defenseculture.mil),



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the DEOCS portal, and OPA's external SharePoint site) as changes are made to the DEOCS process, portal, or anything else that would necessitate an update; ensure all documents have the necessary clearance before they are posted. No new materials will be created this year, but existing materials will be tracked and updated as needed in accordance with changes to the DEOCS.

- 4.11 Provide up to 150 hours of ad hoc analysis support to answer quick-turn or emerging research questions from internal and external stakeholders using DEOCS data.
- 4.12 Assist with monitoring and analyzing DEOCS user feedback surveys that will be administered continuously to a sample of users (including survey administrators, commanders, and commanders' supervisors).
  - 4.12.1 Conduct analyses of the DEOCS user feedback survey **once during the Period of Performance (PoP)**. A data dictionary, annotated syntax, and results output should be provided by dates to be determined and maintained on the government server at all times unless otherwise directed. Analyses should be completed within 2 months of the biannual survey close date.
  - 4.12.2 Provide a topline report and briefing summarizing the results of the analysis to OPA 2 months after the analysis is complete.
- 4.13 Execute phase 2 of validation analyses (i.e., the "predictive" analyses). Conduct analyses as described in the Analysis Plan written under the prior task order (see Task Order 1 PWS Attachment 1). Analyses must include a method for combining factor scores into risk indexes for strategic target outcomes and identifying benchmarks for defining "good" and "bad." Generate multiple methodological options for developing benchmarks and indices for policy stakeholders to select from, with the understanding that the approach will be further improved and refined in future years as more data become available to improve models. Provide all annotated code and output by the end of the PoP. Develop an outline of the Predictive Analysis report for government review 6 months into the PoP. Provide a draft of the report 9 months into the PoP. Provide the final report by the end of the PoP.



- 4.13.1 Obtain access to required datasets and conduct necessary data cleaning and processing, including matching across datasets.
- 4.14 First Annual DEOCS Report (CY2023). In collaboration with the government, develop an outline for the first annual DEOCS report, which will report key metrics and results for all DEOCS data collected in CY2023. Provide a high-level outline 3 months into the PoP. Provide a detailed outline 5 months into the PoP. Conduct analyses as described in the detailed outline (when the 2023 data are ready for analysis in 2024); employ statistical weighting for analyses if this approach is approved at the time of execution. This will include production of “roll-ups” that are analogous to the 2021 and 2022 DEOCS Roll-Up reports. Generate other descriptive statistics and “meta-data” as determined in the outlining process (e.g., number of units, unit characteristics, commander characteristics, timing of DEOCS, etc.). Provide results as statistical output and code, as well as formatted tables with results, by the end of the PoP. Report writing will occur on a subsequent task order.
- 4.15 Contractor Manpower Reporting. If required for this task order after resolution of DFARS case 2018-D063, the contractor shall report contractor labor hours (including subcontractor labor hours) required for performance of services provided under this task order/contract and associated data via a secure collection method, through [www.sam.gov](http://www.sam.gov). Reporting inputs will be for the labor executed during the POP during each Government fiscal year (FY), which runs October 1 through September 30.

**5.0 DELIVERABLES**

Title	Ref.	Delivery Date
Post-Award Kickoff Meeting	4.1	Within 5 calendar days of order award
Project Plan & Timeline	4.1	Within 20 calendar days of order award
OMB Submission Materials	4.2	NLT 5 months after award
Processed Datasets	4.5.1	Within 10 business days of receipt of dataset from operations contractor
Datasets for Data Sharing Environments	4.5.4	Within 15 business days of receipt of dataset from operations contractor
Updated Individual-Level Codebook	4.6.1	Draft 9 months into PoP; Final due by end of PoP



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Draft Unit-Level Codebook	4.6.2	Draft 9 months into PoP; Final due by end of PoP
Updated Statistical Methodology Report	4.6.3	Draft 9 months into PoP; Final due by end of PoP
DEOCS 5.0 Basic Use Dataset	4.7	Quarterly
Outreach and Training Documents	4.10	As needed
Screencasts	4.10.1	Update Quarterly, as needed
User Feedback Survey Analyses	4.12.1	Within 2 months following each biannual survey close date
User Feedback Survey Briefing	4.12.2	Within 2 months of completed analyses
Phase 2 Validation Analyses Human Resources Protection Program (HRPP) Materials	4.13	Outline of the Predictive Analysis report due 6 months into PoP; report draft 9 months into PoP; final report and annotated code and output by end of PoP
First Annual DEOCS Report	4.14	High-level outline 3 months into PoP; detailed outline 5 months into PoP; output, code and formatted tables and results by end of PoP

**6.0 PLACE OF PERFORMANCE.**

The place of performance will be at the contractor’s worksite or Government’s worksite in Alexandria, as space and conditions allow, or at an approved telework or remote location

**7.0 PERIOD OF PERFORMANCE.**

The period of performance shall be twelve (12) months from award.

**8.0 GOVERNMENT FURNISHED INFORMATION**

As specified in the contract.

**9.0 SECURITY CLEARANCE.**

No classified work shall be done under this task order.

**10.0 TRAVEL**

N/A



**11.0 ODCS**

N/A

**12.0 ATTACHMENTS**

<u>TO 1 PWS ATTACHMENT</u>	<u>TITLE</u>	<u>PAGES</u>
1	DEOCS 5.0 Phase 2 Validation Analysis Plan (Outline)	11