



PERFORMANCE WORK STATEMENT (PWS)

Analytical Support

In Support of:

**Defense Human Resources Activity (DHRA)
Office of People Analytics (OPA)**

GSA R9 FAS AAS Acquisition ID: 47QFPA22K0005

Version dated 12/21/2022

1.0 INTRODUCTION

The Office of People Analytics (OPA) Centers for Health & Resilience (H&R) and Retention & Readiness (R&R) conduct web-based and paper surveys and analysis that supports the personnel information needs of the Office of the Under Secretary of Defense for Personnel and Readiness (OUSD [P&R]). OPA also conducts interviews and focus group studies to help better understand the meaning of survey results related to topics such as gender relations. Sponsors include, but are not limited to, the Military Community and Family Policy Office, the Transition to Veterans Program Office, the Defense Suicide Prevention Office, and the Office of the Deputy Assistant Secretary of Defense for Maintenance Policy & Program, and the Sexual Assault Prevention and Response Office. These surveys and assessments gather systematic data on attitudes and opinions on a wide range of personnel issues across the entire Department of Defense (DoD) community. An illustrative schedule of OPA H&R and R&R surveys is provided as Technical Exhibit 1. In addition to supporting surveys, H&R and R&R partner with other OPA divisions to analyze personnel record data and statistical information, sometimes in combination with survey data, to provide actionable models and information. Some H&R and R&R surveys may require Computer Assisted Telephone Interviewing (CATI) either as the primary data collection method or as an ancillary methodology for multi-method surveys including screening and studies of responders and nonresponders. H&R/R&R also conducts “Quick Compass” surveys on specific topics or populations of interest to policymakers (e.g., financial issues, sexual assault responders, military chaplains).

2.0 BACKGROUND

2.1 ORGANIZATION

OPA is part of the Defense Human Resources Activity (DHRA), a DoD Field Activity tasked with enabling DoD policy offices to make decisions based on sound administrative/personnel record data and survey data. OPA H&R and R&R focus on providing these offices with scientific survey data and related focus group and interview data. Sponsoring DoD offices and non-DHRA customers require personnel policy- and program-relevant information: attitudes, opinions, behavioral intentions, and self-reported experiences and outcomes. These data are used to formulate, monitor, and refine policies and programs affecting the morale, health, well-being compensation, benefits, training, selection, assignments, readiness, and retention of DoD personnel and their families. As new policies and programs are developed, DoD requires research and studies that quickly analyze survey and administrative data to assess the expected or actual effectiveness of those policies and programs.

2.2 OVERVIEW

H&R/R&R designs survey procedures, develops sampling and weighting plans and questionnaires, and, through analyses, generates documentation including datasets, tabulations, briefings, infographics, research notes, and white papers.

See https://www.dmdc.osd.mil/appj/dwp/dwp_surveys.jsp for examples of H&R/R&R briefings and reports.

2.3 HISTORICAL DATA

H&R/R&R uses four Government-owned, Government-developed software packages.

1) The Survey Reporting Tool (SRT) is a graphical user interface that is used to develop survey questionnaires and produce automated, publication-ready tabulation volumes, briefing charts, and trend charts. SRT-developed survey questionnaires can be converted into a number of formats (.txt, .doc, etc.) and imported into survey software to create paper- and web-based surveys. The SRT allows the analyst to document the specification of data coding and cleaning in the production of Statistical Analysis Software (SAS) datasets for specification of variables. Upon initial entry of survey questions in the SRT

there is never again a need to retype (risking errors) for creation of the survey on the Web, for creating labeling data variables and values in the dataset, and for including the wording of the items in the automated production of tabulation volumes and briefing charts.

2) The Survey and Variable Authoring System (SURVANT), is an Internet-based tool that is used to develop surveys (web/paper survey creation, testing, editing) for survey database development (variable name, format, and value creation), and for documentation (dataset and codebook creation). SURVANT is used to store survey information (variable names, formats, etc.), to test the survey instrument during quality control procedures, to store analysis recodes as well as maintain and produce survey documentation. It is also used to create basic-use (public) and confidential datasets.

3) The Sampling Tool provides efficient scientific samples for H&R/R&R surveys, using Microsoft Excel and Access. The Sampling Tool allows OPA to estimate the minimum sample size needed to achieve desired precision and confidence goals, given population size, cost, and response rate constraints. OPA is currently developing an R-Based sample allocation tool that mirrors the capability of the prior tool. Contractor should have personnel proficient in the 'R' language.

4) The Survey Analysis Macro (SAM) produces estimates and tests of significance within one survey administration. SAM uses SAS, SUDAAN, and Microsoft products. OPA is currently developing an R-Based Survey Estimation software that mirrors the capability of the SAS/SUDAAN tool. The Contractor should have personnel proficient in the 'R' language.

5) H&R/R&R currently uses SAS in database creation but also creates final datasets in IBM Statistical Package for the Social Sciences (IBM/SPSS) software. SUDAAN, M-Plus, and/or STATA and/or other software packages may also be used to handle the correct estimation of variances.

2.4 PLACE OF PERFORMANCE

Place of performance shall be at the Government site Mark Center in Alexandria, Virginia or at contractor locations. Situational teleworking may also be allowed.

2.5 HOURS OF OPERATIONS

The Contractor shall ensure support and coverage between the core hours of 0900-1500 Monday through Friday, except Federal holidays or when the Government facility is closed due to local or national emergencies, administrative closings, or similar Government-directed facility closings. Contractor personnel are not required to maintain the same hours as Government employees; however, contractor employees performing at the Mark Center in Alexandria, VA must work within the Government's normal work hours, which are from 0700 to 1800 hours Monday through Friday.

2.6 GOVERNMENT HOLIDAYS

The following Government holidays are normally observed by Government personnel: New Year's Day, Martin Luther King's Birthday, Presidential Inauguration Day (metropolitan DC area only), President's Day, Memorial Day, Juneteenth, Independence Day, Labor Day, Columbus Day, Veteran's Day, Thanksgiving Day, Christmas Day, any other day designated by Federal Statute, Executive Order, and/or Presidential Proclamation, or any other kind of administrative leave such as acts of God (i.e. hurricanes, snow storms, tornadoes, etc.), Presidential funerals or any other unexpected Government closures.

2.7 PERIOD OF PERFORMANCE

The period of performance for this effort is the date of award, as stated in the solicitation/contract, for a period of sixty (60) months thereafter, hereto referred to as the Ordering Period.

2.8 PAYMENT FOR AUTHORIZED WORK

No payments will be made for any unauthorized supplies and/or services or for any unauthorized changes to the work specified herein. This includes any services performed by the Contractor of their own volition or at the request of an individual other than a duly appointed Contracting Officer. Only a duly appointed Contracting Officer is authorized to change the specifications, terms, and conditions under this effort.

3.0 SCOPE

OPA requires analytical and Information Technology (IT) support to plan and analyze DoD-wide surveys, interviews, and focus groups and to conduct in depth analysis using various data sources. The Contractor shall provide all personnel management, equipment, and supplies as necessary to perform the requirements as detailed within this PWS. Support will generally be performed in Government office space in Alexandria, Virginia and via telework.

Contract support for the H&R/R&R program can be broken down into ten specific areas. This includes the following:

1. Program Management Support
2. Research, Survey, and Statistical Consultation Support & Analysis
3. Sample, Weighting, and Nonresponse Bias Estimation Support
4. Survey Design/Survey Operations Support
5. Data Collection (qualitative analysis, focus groups, interviews, market research, etc.)
6. Data Science & Programming Support
7. Metrics/Dashboard Support
8. Public Outreach, Data Distribution & Training
9. Development of Survey Statistics, Briefs, Reports
10. Technical Support & Maintenance of Survey Tools

4.0 REQUIREMENTS

4.1 PROGRAM MANAGEMENT SUPPORT

4.1.1 PREPARE A PROJECT MANAGEMENT PLAN (PMP)

The Contractor shall document all support requirements in a PMP. The PMP shall:

1. Describe the proposed management report
2. Contain detailed Standard Operating Procedures (SOPs) for all tasks/projects.
3. Include milestones, tasks, subtasks, and projects required by this Contractor
4. Provide for an overall Work Breakdown Structure (WBS) and associated responsibilities and partnerships between Government organizations

4.1.1.1 Draft PMP

The Contractor shall provide the Government with a draft PMP at the time of proposal, upon which the Government will accept the PMP virtue of contract award and provide comments at the kick-off meeting.

4.1.1.2 Final PMP

The Final PMP shall incorporate the Government's comments within the timeframe specified in section 5.0. The PMP is a living document that describes the plan for providing complete program management support that will fully integrate, manage, control, and document all phases of the contract requirements and should be updated annually at a minimum. The Contractor shall work from the latest Government accepted version of the PMP at time of award.

4.1.2 TASK MANAGEMENT PLAN

Prepare and submit a project plan for each task order with milestones and timelines for deliverables for government approval. Revise the plan as necessary and report any issues to the Contracting Officer's Representative (COR) in a timely manner.

4.1.3 APPOINT A PROJECT MANAGER

The Project Manager (PM) shall be the Contractor's primary point of contact for the government on all areas of performance under this requirement. The PM will be responsible for providing project management capabilities, including scheduling and attending meetings (e.g., Inter-Service Survey Coordinating Committee-ISSCC), developing agendas, documenting meeting minutes, and coordinating survey review packages.

4.1.4 PARTICIPATE IN A POST-AWARD CONFERENCE

This meeting provides an introduction between the Contractor personnel and Government personnel who will be involved with the contract and will aid both parties in achieving a clear and mutual understanding of all requirements and identify and resolve any potential issues. However, this meeting is not a substitute for the contractor fully understanding the work requirements at the time offers are submitted, nor is it to be used to alter the final agreement arrived at in any negotiations leading to contract award. The Contractor shall be prepared to discuss any items requiring clarification and gather information as necessary to support each deliverable and shall submit a written summary of the Post-Award Conference to the COR.

4.1.5 MONTHLY PROGRESS REPORTS

Monthly Progress Reports shall be provided to the COR and should address the extent to which any problems or circumstances will cause conflicts with program schedules. This report should be presented and discussed during quarterly Senior Management Reviews (SMRs).

Reports and discussions shall include:

1. Summary of activities, actions, and progress for the prior quarter
2. Status of each deliverable
3. Financial review for billing purposes
4. Pending issues
5. Analysis of any potential problems, risks/challenges, and risk mitigation plan
6. Summary of projected activities for the next period

4.1.6 MONTHLY STATUS REPORTS

The Contractor PM shall develop and provide an Monthly Status Report (MSR) using Microsoft (MS) Office Suite applications, by the 10th of each month via electronic mail to the GSA PM, Contracting Officer's Representative (COR) and the Contracting Officer (CO). The MSR shall summarize for each contract line item: Financial Review/Expenses, accomplishments during the period, problems met or anticipated, activities anticipated during the next reporting period, and utilization of personnel.

The MSR shall include the following:

1. Activities during reporting period, by task order/ project (include: on-going activities, new activities, activities completed; progress to date on all above mentioned activities). Start each section with a brief description of the task
2. Problems and corrective actions taken. Also include issues or concerns and proposed resolutions to address them
3. Personnel gains, losses, and status (security clearance, etc)
4. Government actions required
5. Schedule (show major tasks, milestones, and deliverables; planned and actual start and completion dates for each)
6. Summary of trips taken, conferences attended, etc. (attach trip reports to the MSR for the relevant reporting period.
7. Accumulated invoiced cost for each Contract Line Item Number (CLIN) up to the previous months
8. Projected cost of each CLIN for the current month

4.1.7 PREPARE A STAFFING PLAN

Prepare a staffing plan that describes the approach for meeting personnel requirements in this PWS and provides corporate resources necessary to ensure and maintain service quality levels, staffing levels, training, and risk management. Initial staffing plan is due with proposal and final project management and staffing plan is due after receipt of contract award within 10 workdays of Government comments.

The Staffing plan must provide at a minimum:

1. A detailed discussion of the methods and approach that will be taken to acquire and/or retain a skilled staff that will meet or exceed the contract requirements.
2. A discussion of the offeror's approach to effectively communicate and coordinate with the Government.

4.1.8 QUALITY CONTROL PLAN

The contractor shall implement and maintain a Quality Control Plan (QCP) to ensure work performed conforms to the scope of work and meets the requirements under this PWS. The QCP shall, at a minimum, provide a method for performing inspections; identifying, correcting, and preventing problems and defective services; addressing customer complaints; and improving the quality of services over the life of the contract. The QCP shall be submitted with the proposal submission and will be evaluated. Updates shall be submitted, as necessary, during the life of the contract.

4.1.9 CONVENE SENIOR MANAGEMENT REVIEW (SMR) MEETINGS

The Contractor PM shall convene a quarterly Senior Management Review (SMR) and contract activity meeting with the COR, and other vital Government stakeholders. The purpose of this meeting is to ensure all stakeholders are informed of the monthly activities and MSR, provide opportunities to identify other activities and establish priorities, and coordinate resolution of identified problems or opportunities. The Contractor PM shall provide minutes of these meetings, including attendance, issues discussed, decisions made, and action items assigned, to the COR within 5 days following each meeting.

4.1.10 TRANSITION OF CONTRACTED SERVICES

The contractor shall provide a plan for transition in and out services to ensure minimum disruption to vital Government business. This plan shall address how the Contractor will work with the incumbent and Government personnel to ensure that there will be no service degradation during and after the transition-in changeover (initial thirty (30) day period after date of contract award) and during the transition-out changeover (ninety (90) day period prior to date of contract expiration). During transition-out (1) demonstrate OPA software tools or similar contractor-provided tools and provide instruction on maintenance, operation, and training for the Survey Reporting Tool (SRT), Sampling Tool, SURVANT, and Statistical Analysis Macros (SAM) or similar contractor provided tools.

The Contractor must begin the process of transitioning personnel in coordination with the Contracting Officer's Representative (COR) and user organizations immediately following completion of all security requirements. The Contractor shall be required to adhere to OPA Analytics Contractor in/out processing requirements. Full Contractor performance begins upon completion of all transition activities with incumbent for up to one hundred eighty (180) days after contract award, or sooner as directed by the Government. Task Orders may specify a more specific transition period. The Contractor must complete the transition of its workforce within one hundred eighty (180) days of contract award.

4.1.10.1 Transition Plan

The Contractor must provide a detailed transition plan with associated timelines for tasks that addresses both phase-in and phase-out for the contract. This plan must be submitted with the Contractor's proposal and should be updated as required.

4.1.10.2 Phase-In Activities

The Contractor must include in its transition plan and perform, at a minimum, the following activities during the phase-in period:

1. Submit requests for physical and network access at performance locations
2. The Contractor must provide OPA Analytics with information on all transition task
3. Establish procedures with the predecessor to ensure transition of provided services without any degradation of service.
4. The Contractor shall identify how it will coordinate with the outgoing contractor and/or Government personnel to transfer knowledge regarding the following:
 - a. Project management processes
 - b. Points of contact
 - c. Location of technical and project management documentation
 - d. Status of ongoing technical initiatives
 - e. Appropriate contractor-to-contractor coordination to ensure a seamless transition.
 - f. Schedules and milestones
 - g. Actions required of the government
 - h. The Contractor shall also establish and maintain effective communication with the incoming contractor/Government personnel for the period of the transition via weekly status meetings.

4.1.10.3 Phase-Out Activities

The Contractor must include in its transition plan and perform, at a minimum, the following activities during the phase-out period:

1. Ensure all services and performance objectives required by the PWS and contract are met throughout the phase-out period.
2. The Contractor must provide OPA Analytics with information on all transition tasks.
3. The Contractor must establish procedures with the successor to ensure transition of provided services without a degradation of service.
4. The Contractor must provide copies of all instructions, records, databases, contract performance metric data, vendor points of contact, and all other procedures developed by the Contractor or in the performance of this contract successor.

4.2 RESEARCH, SURVEY, & STATISTICAL CONSULTATION SUPPORT AND ANALYSIS

4.2.1 Provide research, survey, and/or statistical consultation, advice, and support to OPA and other OSD and Secretary of Defense stakeholders (e.g. OUSD (P&R), Defense Civilian Personnel Advisory Service (DCPAS), and Sexual Assault Prevention and Response Office (SAPRO)). Anticipated products include briefings, infographics, technical reports, information papers, management (executive) reports, overview reports, and papers for presentation at professional conferences or submitted to professional journals containing analysis relevant to DoD actions, policies, or procedures. Other products include user manuals for personnel or manpower policy/program implementation, documentation of surveys and codebooks, and maintenance/enhancements of computer program/web site applications supporting the OPA mission.

4.2.2 Assist with preliminary and complex analyses of data including univariate and multivariate statistical analyses (e.g., logistic regression, path analysis), and structural equation modeling (SEM) using SAS and other statistical analysis package skills.

4.2.3 Assist with quick turn ad hoc analyses and requests for information regarding OPA research findings from OPA customers. This may include, but is not limited to, conducting a content analysis of open-ended comments at the end of surveys, follow-on analysis of data by demographic groups of interest, and logistical regression analysis.

4.2.4 Support the pre-coordination, review, and approval of Internal and Public-information collections involving surveys, focus groups, and interviews in compliance with DoD instructions (DoDI) and directives (e.g., DoDI 1100.13; DoDI 8910.01; DoDI 3216.02) on use of surveys for data collection, use of survey data for secondary analyses, and use of human subjects in research.

4.2.5 Attend conferences and meet with federal, state, and local officials as well as members of the public and constituent groups in order to remain current with best practices relative to government and industry surveys.

4.2.6 Update and document procedures for automating survey operations including questionnaire development, briefing/trend charts, and analyses. Provide internal training for any new processes.

4.2.7 Be proficient in the use of Microsoft Office ® software applications (Excel, Access, Word, Outlook, and Project) and SharePoint®. Contractor personnel shall possess strong writing and analytic skills.

4.3 SAMPLE, WEIGHTING, AND NONRESPONSE BIAS ESTIMATION SUPPORT

4.3.1 Provide statistical support by designing complex, stratified samples, weighting survey data to account for differential selection probabilities and response propensities, and post-stratification, or other method to control weights to a known population. Use software (e.g., SUDAAN) to appropriately make variance estimates from complex sample designs. Use and modify H&R/R&R statistical software programs (SUDAAN or preferably R) to perform appropriate statistical tests to determine whether differences in estimates across subgroups (e.g., Service) or time are statistically significant. Perform nonresponse bias analyses and serve as technical expert on nonresponse bias methods. Serve as technical expert on missing data methods. In addition, disclosure analysis should be conducted on datasets to be delivered outside of OPA. Survey sample sizes typically range from 50,000 to 100,000. On occasion, smaller (~30,000) or larger (~700,000) surveys are conducted. Contractor should have the statistical expertise on Disclosure Avoidance procedures (e.g., Synthetic data, data swapping).

4.3.2 In support of OPA's statistical group, provide expert advice and programming for performing analyses, technical notes or memorandum documenting the statistical issues considered, and recommendations made. Such reports are to be complete with equations, citations, results of analyses performed, and copies of analysis statements prepared for execution in SAS, SUDAAN, R, or other government-approved software packages.

4.4 SURVEY DESIGN/SURVEY OPERATIONS SUPPORT

4.4.1 Support survey design, construction, and execution of survey studies using self-administered web-based, mobile, and paper and pencil questionnaires, and nation- wide, world-wide computer-assisted telephone interviewing (CATI), and pretesting protocols including those requiring cognitive pretesting.

4.4.2 Develop coding schemes. Validate and document survey findings in tabulation volumes, trend reports and briefings, and management reports. Document datasets in codebooks. See <https://www.esd.whs.mil/portals/54/documents/fold/reading room/personnel related/dmdc 2006-034.pdf> and <http://www.dtic.mil/docs/citations/ADA514130> for examples of codebooks.

4.4.3 Conduct quality assurance tasks related to survey operations. Quality assurance checks and data validation should include dataset/product/deliverable quality checks, inter-rater reliability for qualitative data, and frequency runs to verify sample and population characteristics.

4.5 DATA COLLECTION

4.5.1 Support survey design, construction, and execution of nation- wide, or world-wide focus groups; nation-wide in-person interviewing protocols, and pretesting protocols including those requiring cognitive pretesting.

4.5.2 Assist in designing content for focus groups, conducting focus groups, and conducting analysis of focus group sessions by identifying major themes and ideas conveyed across the sessions. For each theme, include supporting comments from the focus group participants.

4.6 DATA SCIENCE & PROGRAMMING SUPPORT

4.6.1 In support of OPA's data science group, provide expert advice (e.g., analysis of alternatives, etc.), project documentation and programming (i.e., documented in R markdown, Python/Databricks, Notebook, or similar platforms) on diverse data science projects including optimization and automation (e.g., process modernization), functional statistical and mathematical algorithm deployment (e.g., machine learning and optimization on structured and unstructured data), document algorithm performance (e.g., hold out sample validation), using R, Python, and big data analysis platforms on both single and multiple node platforms. Provide transparency with organized, commented reproducible code, complete documentation, and/or training on any scripts, methods, and processes.

4.7 METRICS/DASHBOARD SUPPORT

4.7.1 In support of DHRA strategic planning, refine, collect, analyze, and report enterprise strategic-planning metrics, train staff in order to sustain measurement expertise throughout the Enterprise, and consult with stakeholders regarding the quality of said metrics.

4.8 PUBLIC OUTREACH, DATA DISTRIBUTION, & TRAINING

4.8.1 Distribute datasets in response to requests for current and historical data in compliance with Freedom of Information Act requirements, Privacy Advisory or Privacy Act statements, and consistent with OPA procedures to ensure integrity and security of data.

4.8.2 Coordinate the completion and dissemination of research results within OPA and to external clients through Web publication and email notification.

4.8.3 Track the details of all OPA data requests.

4.9 DEVELOPMENT OF SURVEY STATISTICS, BRIEFS, & REPORTS

4.9.1 Technically edit all technical reports, management (executive) reports, survey notes, and overview reports prior to submission to the government.

4.9.2 Assist in the design and development of final products including tabulation of responses, briefings, management (executive) reports, overview reports, and research/survey notes.

4.9.3 Apply all applicable professional styles and standards of Offices of the Secretary of Defense and USD (P&R), and OPA to technical documentation and research/survey notes produced for evaluations, studies, and analyses, as well as memos, information papers, and briefings related to DoD personnel policies and programs. All editing shall be done according to the publication manual of OPA, "Guidelines for Preparing and Submitting Technical Documentation for Publication." In addition, technical editing by the contractor must be consistent with the latest edition of the Publication Manual of the American Psychological Association (APA). The writing style of deliverables should be appropriate for submission to peer-reviewed journals of the APA and similar professional organizations. Maintain OPA Word and PowerPoint templates and maintain the OPA report tracking system.

4.10 TECHNICAL SUPPORT, DEVELOPMENT & MAINTENANCE OF SURVEY TOOLS

4.10.1 Provide technical support and maintenance for OPA in-house survey tools (or comparable contractor tools). OPA currently uses Survey Reporting Tool (SRT), Sampling Tool, and Statistical Analysis Macros (SAM).

4.10.2 SRT MODERNIZATION

4.10.2.1 Provide documentation on the current SRT implementation. The documentation to be provided must be in the form of business, functional, and technical requirement specifications.

4.10.2.2 Re-write the application to meet application security requirements in accordance with (IAW) Application Security and Development Security Technical Implementation Guide (ASD STIG).

4.10.2.3 Utilize approved and supported technology that is available on the Defense Manpower Data Center's Deployable Technology List (DTL).

4.10.2.4 Adhere to DHRA Application Security and Architecture Review Board requirements in order to maintain continuous cybersecurity compliance.

4.10.2.5 Maintain the modernized application and its components IAW DHRA approved Cybersecurity Business Process Requirements (BPR).

4.10.3 Mass Email System

Serve as the Program Manager of OPA's mass email system, with oversight that includes:

1. The operational aspects of the mass email system include identifying and troubleshooting technical issues, conducting on-going analysis of email logs, and testing updates.
2. Continuously monitoring of the mass email system and proactively addressing issues when identified.
3. Developing processes and communications with the Services and Defense Information Systems Agency (DISA) to help identify and mitigate issues related to blacklisting or otherwise not delivering the survey emails and/or delegating them to spam folders. Additionally, work with the Services and DISA to ensure the websites OPA uses to collect survey data are not blocked as well.
4. Developing best practices for prior, during, and after the survey administration to ensure a smooth fielding.
5. Ensuring that the mass email system is equipped to handle the increase in email volume that will accompany the transition to a fully-confidential Defense Organizational Climate Survey (DEOCS), taking any steps as needed to mitigate problems and ensure success of this critical, highly-visible DEOCS enhancement.
6. Exploring and implementing ways to enhance the email communications.
7. Developing and reviewing technical requirements for a new vendor, if applicable.

5.0 DELIVERABLES

The specific deliverables will vary given the specific task order. Following is a listing of the types of work products/deliverables that the Contractor may be required to provide in performance of the PWS under resulting task orders: Task Order Project Plan, develop and maintain a system for the tracking of both internal and external H&R/R&R milestones, monthly progress reports, quarterly Senior Management Review (SMR) report, SMR minutes, Post-Award Conference, Post-Award Conference Written summary, Contractor Manpower Reporting, Quality Control Plan (Final), demonstration of capability to take over functions of SRT, Sampling Tool, and SAM2, and demonstration of capability to use SURVANT. One or several may be required under any given task order.

All deliverables and reports shall be submitted to the Contracting Officer's Representative (COR) and uploaded to GSA's database, ASSIST, through collaboration to the Client COR, Contracting Officer (CO) and Project Manager (PM). Deliverables are due the next Government workday if the due date falls on a holiday or weekend.

The contractor shall submit the following unclassified deliverables listed in the table below:

TABLE 1 - DELIVERABLES

TASK ORDER DELIVERABLE / CONTRACT DELIVERABLE / MILESTONE	MILESTONE / DELIVERABLE	PWS REFERENCE	PLANNED / COMPLETION DATE
Task Order Deliverable	Project Management Plan/Task Management Plan	4.1 and 4.1.2	To be determined with each task order
Task Order Deliverable	Briefings, infographics, technical reports, information papers, management and overview reports, papers for presentation, user manuals, survey documentation and coding schemes and codebooks	4.4 and 4.9	To be determined with each task order
Task Order Deliverable	Survey studies using self-administered web-based and paper and pencil questionnaires/interview	4.4	To be determined with each task order.
Task Order Deliverable	Briefings, management (executive) reports, overview reports, tabulations of responses, and survey notes	4.9	To be determined with each task order.
Task Order Deliverable	Preliminary and complex analyses of data including univariate and multivariate statistical analyses	4.2.2	To be determined with each task order.
Task Order Deliverable	Designing content for focus groups, conducting focus groups, and conducting analysis of focus group sessions	4.5.2	To be determined with each task order.
Task Order Deliverable	Ad Hoc analyses and requests	4.2.3	To be determined with each task order.

TASK ORDER DELIVERABLE / CONTRACT DELIVERABLE / MILESTONE	MILESTONE / DELIVERABLE	PWS REFERENCE	PLANNED / COMPLETION DATE
Task Order Deliverable	Consultation and programming for performing analyses, technical notes or memorandum documenting the statistical issues, and recommendations	4.2	To be determined with each task order.
Task Order Deliverable	Data science group, consultation (e.g., analysis of alternatives, etc.) and programming and algorithm Documentation	4.6	To be determined with each task order.
Task Order Deliverable	Update and document procedures for automating survey operations, questionnaire development, briefing/trend charts, and analyses. Provide internal training for any new processes.	4.2.6	To be determined with each task order.
Task Order Deliverable	Develop coding schemes. Validate and document survey findings in tabulation volumes.	4.4.2	To be determined with each task order.
Task Order Deliverable	Develop and maintain a system for the tracking of both internal and external H&R/R&R milestones.	5.0	To be determined with each task order.
Task Order Deliverable	Develop agendas and meeting minutes	4.1.3	To be determined with each task order.
Contract Deliverable	Monthly Status Reports	4.1.6	Delivered Monthly (by the 10th calendar day of the next month)
Contract Deliverable	Post-Award Conference and written summary	4.1.4	After contract award
Contract Deliverable	Staffing Plan	4.1.7	Draft due with proposal and final due after award within 10 workdays of

TASK ORDER DELIVERABLE / CONTRACT DELIVERABLE / MILESTONE	MILESTONE / DELIVERABLE	PWS REFERENCE	PLANNED / COMPLETION DATE
			Government comments
Contract/Task Order Deliverable	Service Contract Reporting	15.0	Reported no later than October 31 of each calendar year.
Contract Deliverable	Business, Functional, Technical Requirements Specification documents	4.10.2.1	Within 3 months after contract award
Contract Deliverable	Re-write application	4.10.2.2	Within 9 months after contract award
Contract Deliverable	Selection of the approved technology stack	4.10.2.3	Within 3 months after the contract award
Contract Deliverable	Provide test plans, procedures	4.10.2	Within 6 months after contract award
Contract Deliverable	Complete ASD STIG, remediate, or develop POAM where applicable	4.10.2.2	Within 9 months after contract award
Contract Deliverable	Quality Control Plan	4.1.8	The QCP submitted with the offerors proposal as a separate attachment will be accepted by the Government by virtue of the award. Updates shall be submitted, as necessary, during the life of the contract.
Contract Deliverable	Transition of contracted services	4.1.10	At time of proposal submission

6.0 QUALITY ASSURANCE

The Government intends to utilize a Quality Assurance Surveillance Plan (QASP) to monitor the quality of the Contractor's performance. The oversight provided for in the order and in the QASP will help to ensure that service levels reach and maintain the required levels throughout the contract term. Further, the QASP provides the COR with a proactive way to avoid unacceptable or deficient performance and provides verifiable input for the required Past Performance Information Assessments. A draft QASP will be provided by the Government and will be revised following contract award. The QASP will be a living document and may be updated by the Government as necessary. By monitoring the Contractor, the COR will determine whether the performance levels set forth in the order have been attained. Performance standards are specified in the following Performance Requirements Summary Matrix found below in the Standard and Acceptable Quality Level columns.

TABLE 2 - PERFORMANCE REQUIREMENTS SUMMARY MATRIX

NUMBER	REQUIRED SERVICES (TASKS)		PERFORMANCE STANDARD	ACCEPTABLE LEVEL
1	Task Order Deliverables		Deliverables submitted by the due date with no errors. Refer to deliverables in section 5.0 of the PWS.	Not more than two deliverables can be submitted to the COR later than required submission date; deliverables shall require minimal editing
2	Contract Deliverables		Deliverables submitted by the due date with no errors. Refer to deliverables in section 5.0 and 4.1-4.27 of the PWS.	Not more than two deliverables can be submitted to the COR later than required submission date or with errors
3	Monthly Progress Report		Reports completed by the 10th day of the following month with no errors	Not more than two failures to comply per year.
4	Analytic Support		Analytical support staff provides a wide variety of services including research, survey, consultation, and work requests such as enhancements. Measure the satisfaction levels relating to the support provided by the analytical areas.	All support needs are fulfilled on time and within budget. All deliverables including procedural documentation, user's guides, procedures, and other such documents shall be accurate and require minimal editing.
5	Technical Needs		Shows understanding of requirements and is efficient and effective in meeting	Contractor submitted reports and data shall be accurate; products

NUMBER	REQUIRED SERVICES (TASKS)		PERFORMANCE STANDARD	ACCEPTABLE LEVEL
			requirements. Meets technical needs and mission requirements. Offers quality services/products	shall require minimal editing.
6	Project Milestones and Schedule		Project deliverables are delivered within project milestones and with no errors.	Contractor shall adhere to task order deliverable schedules with no more than two late reports per year.
7	Cost Control		Contractor stays within project budget and maintains program budget limitations and burn rate.	Task order expense shall be within awarded task order amounts, monthly status reports shall contain an accurate reflection of all expenses to date and all invoices shall be accurate and contain required supporting documentation. No more than one error per quarter, and any issues are remedied within seven calendar days of identification of issue.

7.0 NON-PERSONAL SERVICES STATEMENT

OPA has determined that use of the GSA AAS to to procure these requirements is in the best interest of the Government, economic and other factors considered, and this contract and subordinate task orders are not being used to procure personal services prohibited by the FAR Part 37.104 titled "Personal Services Contract".

8.0 DOCUMENTATION SUBMISSION

The ASSIST will be used in the administration of this task order. This web-based system (<https://portal.fas.gsa.gov>) shall be used by the contractor for monthly status reports, including invoices, financials, and narratives.

8.1 INVOICES

Pursuant to FAR 52.232-1, Payments, submission of Proof of Delivery at time of invoice to GSA will expedite processing for payment. The Contractor shall submit invoices for client review and acceptance electronically via GSA's ASSIST at <https://portal.fas.gsa.gov>.

Invoices shall include the procurement instrument identifier (PIID) number and the Accounting Control Transaction (ACT) number listed for proper identification. Failure to include this information may result in invoice rejection. The contractor shall be required to resubmit rejected invoices, which may cause a delay in processing payments. The responsible contractor shall submit all invoices in ASSIST for review before a payment can be approved by the responsible Government agent. Failure to comply with these requirements will deem the Invoice invalid and the invoice will be rejected. Any submitted invoice(s) must match the information currently found within the Central Contractor Registration (CCR). Contractors are encouraged to verify their current registration information at www.ccr.gov prior to preparing and submitting invoices to avoid unnecessary invoice processing delays or invoice rejects.

8.2 DELIVERABLES/REPORTS (NOT MONTHLY STATUS REPORTS)

Deliverables must be uploaded in ASSIST under 'Collaboration – Deliverables.' The contractor shall be responsible for the quality of deliverables for the delivery orders. All reports except monthly reports shall be prepared in accordance with OPA Analytic report guidelines as specified in each task order. The contractor shall be responsible for all reports complying with the Guidelines as well as all other requirements of this contract. All reports, as well as other documents such as manuals and briefings, shall be carefully edited to ensure that the highest standards of written communication, typing, reproduction, etc. are attained. Reports shall be delivered by the contractor ready for printing with completed Report Documentation Page (SF 298), Tables of Contents, and Executive Summaries, etc., as required by the specific delivery order. Unless stated otherwise in a specific delivery order, any technical report, final technical report, user manual, or other document that needs copy editing when submitted to OPA Analytics will be returned to the contractor as unacceptable.

8.2.1 ELECTRONIC COPY OF EACH REPORT

The contractor shall deliver one electronic copy of each report or document in a file format compatible with the Microsoft Office Suite. OPA Analytics as part of OUSD (P&R) is standardized on the Microsoft Windows environment and requires compatible file formats in all deliverables.

1. All reports will be submitted electronically. Other deliverables, with delivery order Contracting Officer approval, may be submitted by electronic mail that preserves all file characteristics and formatting.
2. Unless stated otherwise in the specific Task Order, the Government will be allowed fifteen (15) working days for each review of a draft or final dataset or technical document and to notify the contractor of acceptability. If the Government exceeds the amount of time set forth in the delivery order for review, approval, and/or recommending changes in the draft, the contractor shall be allowed one (1) additional day, at no additional cost to the Government, for each day of such delay for delivery of the final report in final form, providing that in the event the Government causes such delay, the contractor shall request an extension in writing from the Contracting Officer.
3. Monthly progress reports for each delivery order shall summarize the support tasks performed under that delivery order and shall describe all problems encountered or anticipated, the status of the tasks, milestones achieved or missed, and anticipated activities for the next reporting period. It shall reflect the current fiscal status of the delivery order. The contractor shall send each progress report to the designated COR as required by the contract to the addresses designated by the COR.

9.0 INTELLECTUAL PROPERTY

This task order is funded by the United States Government. All intellectual property generated and/or delivered pursuant to this PWS shall be subject to appropriate federal acquisition regulations which entitle the Government to unlimited license rights in technical data and computer software developed exclusively with Government funds, a nonexclusive "paid-up" license to practice any patentable invention or

discovery made during the performance of this task order, and a "paid-up" nonexclusive and irrevocable worldwide license to reproduce all works (including technical and scientific articles) produced during this task order. All products delivered under this performance work statement shall conform to current DoD standards and guidelines.

10.0 508 COMPLIANCE

Any/all electronic and information technology (EIT) procured through this effort must meet the applicable accessibility standards at 36 CFR 1194. 36 CFR 1194 implements Section 508 of the Rehabilitation Act of 1973, as amended, and is viewable at <http://www.section508.gov>. The standards apply to the following:

1. Software Applications and Operating Systems
2. Web-based Information or Applications
3. Telecommunication Products
4. Video and Multimedia Products
5. Self- Contained, Closed Products (e.g., Information Kiosks, Calculators, and Fax Machines)
6. Desktop and Portable Computers

11.0 SECURITY CLASSIFICATION

11.1 Comply with DoD Directive 8500.1 Information Assurance (IA), DoD Instruction 8500.2 Information Assurance (IA) Implementation, DoD Directive 5400.11 DoD Privacy Program, DoD 6025.18-R DoD Health Information Privacy Regulation, DoD 5200.2-R Personnel Security Program, and Homeland Security Presidential Directive (HSPD) 12 for all contractor personnel with access to or responsibility for nonpublic Government data.

11.2 Establish appropriate administrative, technical, and physical safeguards to protect any and all nonpublic Government data to ensure the confidentiality, integrity, and availability of government data.

11.3 Contractor personnel with access to or responsibility for nonpublic Government data under this contract must comply with HSPD-12 Personal Identity Verification (PIV) issuance requirements, known as the Common Access Card (CAC) for OPA and must:

11.3.1 Be CAC or PIV ready prior to reporting for work. At minimum all contractor personnel must obtain/maintain a favorable FBI National Criminal History Check (fingerprint check), identification to prove identity and employment authorization (I-9 document), and submit a National Agency Check and Law Credit (NACLAC) vetting package for processing. Obtaining CAC or PIV ready status is the responsibility of the contractor. It is the responsibility of the contractor to notify OPA when this is complete.

11.3.2 Be citizens of the United States.

11.4 If at any time, any Contractor person requiring a CAC is unable to obtain/maintain an adjudicated NACLAC, the Contractor shall immediately notify the OPA Information Systems Security Group (DISSG) to remove such person from work under this contract.

11.5 The Contractor shall report immediately to the OPA CIO / Privacy Office and secondly to the COR discovery of any privacy breach.

12.0 GOVERNMENT FURNISHED EQUIPMENT OR INFORMATION

Ten workstations are currently available for contract performers at the Mark Center in Alexandria, Virginia. These workstations can be shared amongst contractor personnel, for a total capacity of 20 contractor personnel. For example, current contractors alternate telework and days in the office. Computer equipment and software will be provided for on-site use by contractor employees.

13.0 TRAVEL

Contractor costs for Government authorized travel are included in this contract. All travel shall be in accordance with joint travel regulations (JTR). Contractor payment claims shall include applicable documentation to support actual costs incurred (e.g. airfare and hotel/lodging receipts) as well as any receipts valued at or above \$75.00. Failure to provide appropriate documentation may result in loss of reimbursement of travel expenses. Specific travel requirements will be determined at the task order level. A small amount of travel is anticipated; however, destinations may include both CONUS and OCONUS locations. Contractor must submit travel requests for government/COR approval at least 5 business days prior to travel.

14.0 ODCs

Any ODC expenses shall be within funded amounts on the task order and shall receive government COR approval prior to funds being expended. The COR must approve all requests for final ODCs prior to the contractor incurring costs. The Contractor shall attach back up documentation/receipts to the invoice. Invoices for ODCs will not be paid until proper verification of backup documentation including purchase approval and receipts.

15.0 PERSONNEL REQUIREMENTS:

See RFP Exhibit A - Price Workbook tab "Personnel Requirements."

TABLE 3 - PERSONNEL REQUIREMENTS

The Government does not intend to dictate the composition of the ideal team to perform this contract. Therefore, the Government encourages and will evaluate Personnel as proposed by the offeror. The overall contract requires a Project Manager be available throughout the order to assume responsibility for overall contract performance, individual project performance, and deliverables, communication between the contractor and the Government, as well as all subcontractors that are part of the contractor's team supporting the Government.

16.0 SERVICE CONTRACT REPORTING

In accordance with FAR CLAUSE 52.204-15 and Section 8108 of Public Law 112-10 of the Department of Defense and Full-Year Continuing Appropriations Action, 2011. The contractor shall report all labor hours required for performance of services provided under this task order via the secure SAM.gov data collection site. The contractor is required to completely fill in all required data fields at www.sam.gov. Reporting inputs shall be for the labor executed during the period of performance for each Government fiscal year (FY), which runs 1 October through 30 September. While inputs may be reported anytime during the FY, all data shall be reported no later than 31 October of each calendar year. The contractor may direct questions to the Federal Service Desk help desk (by telephone at 866-606-8220 (U.S.)). The prime contractor is responsible to ensure all subcontractor data is reported.

17.0 APPLICABLE DOCUMENTS

DoDI Instruction 8500.01 Cybersecurity

https://www.esd.whs.mil/portals/54/documents/dd/issuances/dodi/850001_2014.pdf

DoD Manual 5400.11-R DoD Privacy Program

<https://www.esd.whs.mil/portals/54/documents/dd/issuances/dodm/540011r.pdf>

DoD Manual 6025.18 Implementation of the Health Insurance Portability and Accountability Act (HIPAA) Privacy Rule in DoD Health Programs

<http://www.esd.whs.mil/portals/54/documents/dd/issuances/dodm/602518m.pdf>

DoD Instruction 5200.02 Personnel Security Program (PSP)

<http://www.esd.whs.mil/portals/54/documents/dd/issuances/dodi/520002p.pdf>

Homeland Security Presidential Directive (HSPD) 12

<http://www.dhs.gov/homeland-security-presidential-directive-12>

DOD Instruction 3216.02, 32 CFR 219, Protection of Human Subjects and Adherence to Ethical Standards in DOD-Supported Research

<https://www.esd.whs.mil/Portals/54/Documents/DD/issuances/dodi/321602p.pdf?ver=1YBdvYTGKmdHUfRC4wNiKA%3d%3d>

32 CFR 219, Protection of Human Subjects

<https://www.ecfr.gov/current/title-32/subtitle-A/chapter-I/subchapter-M/part-219?toc=1>

DoD Instruction 1100.13, Surveys of DoD Personnel

<https://www.esd.whs.mil/Portals/54/Documents/DD/issuances/dodi/110013p.pdf?ver=2019-04-08-125316-290>

DoDI 8910.01 DoD Implementation of the Paperwork Reduction Act

https://www.esd.whs.mil/Portals/54/Documents/DD/issuances/dodi/891001p.pdf?ver=C8dFNh1U6ALaI_AQaQPtkw%3d%3d

DoD Manual 8910.01, volume 1 Procedures for DoD Internal Information Collection

https://www.esd.whs.mil/Portals/54/Documents/DD/issuances/dodm/891001_vol1.PDF?ver=DI2nIXILIP01zg1ZgUxMfA%3d%3d

Publication Manual of the American Psychological Association, Sixth Edition <http://www.apastyle.org/>

TECHNICAL EXHIBIT 1

Anticipated H&R/R&R Survey Schedule for 2023 - 2027:

<u>Survey Name</u>	<u>Frequency</u>	<u>Data Collection</u>
Active Duty SOFS (SOFA)	1 per year	
Reserve SOFS (SOFR)	1 per year	
Reserve Component Gender Relations (WGRR)	Every 2 years	2023
Active Duty Gender Relations (WGRA)	Every 2 years	2023
Reserve Equal Opportunity (WEOR)	Every 4 years	2022
Active Duty Equal Opportunity (WEOA)	Every 4 years	2022
Service Academy Focus Groups (SAGR)	Every 2 years	2023
Service Academy Survey (SAGR)	Every 2 years	2022
Active Duty Spouses (ADSS)	Every 2 years	2023
Reserve Spouses (RCSS)	Every 2 years	2022
DoD Performance Management Evaluation of Civilians (DPMEC)	Every 2 years	2022
Defense Organizational Climate Survey (DEOCS)	Ongoing	

TECHNICAL EXHIBIT 2

CONTRACT DISCREPANCY REPORT (CDR)

1. **Contract Number:** <insert number>
2. **TO:** (Contractor's Manager or on-site representative) <insert name>
3. **FROM:** (Name of COR) <insert name>
4. **Date and time observed discrepancy:** <insert date and time>
5. **DISCREPANCY OR PROBLEM:**

<Describe in detail. Identify any attachments.>

6. Corrective action plan:

A written corrective action plan < is / is not > required.

< If a written corrective action plan is required include the following. > The written Corrective Action Plan will be provided to the undersigned not later than < # > days after receipt of this CDR.

Prepared by: <Enter COR's name>

Signature – Contracting Officer's Representative

Date

Received by:

Signature – Contractor's Manager or on-site representative

Date