

## **Section C - Descriptions and Specifications**

**PERFORMANCE WORK STATEMENT (PWS)  
FOR  
RFP # 1406-04-08-RP-20652  
Military Community and Family Support Services  
MILITARY ONESOURCE Program**

### **1.0 SCOPE**

#### **1.1 INTRODUCTION**

On behalf of the Military Departments and the Guard and Reserve Components, the Department of Defense (DoD) requires a contractor to provide services in support of the Military OneSource program. This program, a primary source of information for troops and families, provides members of the Armed Forces and their families, about 4 million persons (“Client”) at locations worldwide, with a broad array of information and referrals to both military and civilian resources as well as counseling services. Over the course of this contract, the DoD may also designate other civilian personnel to be Clients.

(i) These services shall be available through the Internet, telephone (via 800 number and collect calls) e-mail, postal and face-to-face, 24 hours a day, 7 days a week. The contractor shall maintain the current 800 number and be responsible for all costs associated with the toll free services including service provider fees and usage charges.

(ii) It is understood that this is a dynamic environment encompassing comprehensive Support Systems related to military members and their families. Unpredictable world events (such as terrorism attacks at home) and military situations (such as deployments) may affect this contract, thus challenging DoD and the contractor with developing innovative options and solutions to support military members and their families in a “just-in-time” mode.

##### **1.1.1 BACKGROUND**

Today, U.S. military forces are engaged in conflicts around the world in support of the Global War on Terrorism (GWOT), most prominently in Operation Iraqi Freedom (OIF) and Operation Enduring Freedom (OEF). Ongoing deployments, changing demographics, and other challenges exert considerable stress on military members and their family members. Unnecessary concern over these and other issues can diminish mission readiness, particularly for those on the battlefield.

The GWOT has resulted in an unprecedented level of lengthy and repeated deployments of American military personnel to Iraq, Afghanistan and other international areas of extreme conflict. These deployments into harm’s way, which are viewed nightly on national television, have placed extreme stress on military families. Stress on marriages is at unprecedented levels. Military families are struggling to balance complex and competing demands requiring a wide range of problem solving skills to include, but not limited to: single parenting; communications; child care; financial stability; spouse employment; fluctuating family income; frequent relocations; isolation from other military families (Guard and Reserve families); family’s education needs, etc. The DoD recognizes that families also serve and is committed to supporting military families. The Department intends to make expert telephonic consultation, referral, and information services and short term, situational, problem-solving counseling services available to troops, on demand.

The Department of Defense (DoD) recognizes the reciprocal relationship that binds the military member, the military mission, and military families. Military OneSource demonstrates the commitment of the DoD to improving the quality of life for military members and their families. These information and support services, fully integrated with other resources available throughout the military community, reveal the concern of military leaders for the

welfare of military members and their families. Military OneSource helps ensure that military members will continue to be mission deployable.

## **1.2 SCOPE OF WORK**

The scope of the MOS effort encompasses all resources and development of resources, processes, personnel, materials, training, equipment, and technology necessary to provide service members and their families with unlimited access (via 24-hour, toll-free telephone and on-line/Internet) to stateside and international information, referral and counseling services available through a centralized source.

A visual illustration of the scope of this contract may be found in Section J, attachment 10. There are emerging needs for this requirement, some have already become established, others are arising, and additional needs are expected to develop in the future. Due to the continuing war efforts, it can be challenging to predict specific emerging needs; however the flexibility and ability for the contractor to address this needs is most imperative.

It is understood that this is a dynamic environment encompassing quality of life support systems in support of military members and their dependents; therefore, the intent is to have a flexible contract that allows the Government to quickly address changing social, educational or military mission. The dynamic needs of the Client community may drive modification of the effort to satisfy Client needs in a rapidly changing environment. Client needs require contractor to employ a broad range of both military specific and civilian resources, thus requiring a flexible contract that allows the Government to quickly address Client needs as they emerge. Any changes to the level of effort of this contract will only be directed by the Contracting Officer.

1.2.1 Individuals are eligible to be Military OneSource Clients if they are:

1.2.1.1 Active duty members of the Military Services (Army, Navy, Marine Corps, and Air Force) and their legal dependents;

1.2.1.2 Members of the Army Guard, Air Guard, the Army, Navy, Marine Corps, and Air Force Reserves, and their legal dependents;

1.2.1.3 Members of the US Coast Guard on active duty, and their legal dependents, mobilized under the authority of the Department of Defense; and

1.2.1.4 DoD Civilians, and their legal dependents, mobilized for overseas in support of the GWOT and as a result of DoD realignment issues.

1.2.1.5 DoD Civilians staffing military support programs as identified by DoD, to include Chaplains, Family Support Services Staff, medical personnel and Department of Defense Education Activity staff (approximately 50,000 staff members).

1.2.2 The Military OneSource Program includes, but is not limited to: call center operations and website development/operations providing expert information/referral and educational/consultation services; educational/information materials; Counseling services; the Military OneSource Center to include research and program development. Information/referrals and education/consultation services shall cover the full range of services/programs in both the military and civilian sectors. Services shall be provided both in the Continental United States (CONUS) and Outside the Continental United States (OCONUS) through Military OneSource.

1.2.3 The scope of MOS provides professional and technical expertise, as required, in a variety of disciplines that impact the lives of military members and their dependents. The counselors/consultants shall be available 24/7, to provide expert consultation, education, information, and referral services. These services shall be consultative in nature; solicitation of any type is prohibited under this contract.

1.2.4 The Contractor shall maintain an Employee Assistance Professional/Work Life structural organization and integrate non-medical counseling services within Military OneSource. The description shall include information regarding the contractor's experience as an EAP provider. The Contractor shall provide information regarding the organization's standing within the EAP/Work life industry. The Contractor shall demonstrate knowledge and understanding of and respect for the military and a substantial precedent for hiring military spouses.

## 2.0 APPLICABLE DOCUMENTS

2.1 U.S. Rehabilitation Act, Section 508; <http://www.section508.gov/>

2.2 DoD 5400.11-R, "Department of Defense Privacy Program", May 14, 2007;  
<http://www.dtic.mil/whs/directives/corres/pdf/540011r.pdf>

2.3 DoD Instruction 8510.10, "DoD Information Assurance Certification and Accreditation Process (DIACAP), November 28, 2007; <http://www.dtic.mil/whs/directives/corres/pdf/851001p.pdf>

## 3.0 REQUIREMENTS

### 3.1 MILITARY ONESOURCE PROGRAM

3.1.1 The contractor shall provide Call Center services necessary to manage and operate DoD's Military OneSource Program, 24/7. Call Centers shall be located in CONUS. Services shall include recruiting, hiring, training and managing a professional staff to provide expert consultation and education on a wide array of topics; the establishment of business applications; interpreter and translation services; back-up operations and surge handling; developing the technological infrastructure necessary to operate a Call Center; and refreshing the technology used to maintain it state-of-the-art. Services provided include but are not limited to:

Child Care
Counseling for Non-Medical Issues (telephonic, on-line, in-person)
Deployment Support (mobilization and reintegration)
Disability
Domestic Violence prevention
Elder Care
Education Services for Adults, Children and Youth (DODEA, Tuition Assistance, K-12)
Everyday Issues (e.g., location of a plumber or car repair)
Family Support (Active Duty, Guard and Reserve )
Financial Matters (budgeting, financial counseling and planning, on-line state and federal tax filing and assistance, debt reduction, etc.)
Health and Wellness
Housing (rentals, mortgage, military housing allowances)
Legal Services Information
Lodging in military facilities
Military Benefits
Parenting
Pet Care
Recreation (i.e. Morale, Welfare)
Relocation
Single Troop Services
Shopping and Services (Commissary and Post Exchanges)
Special Needs Services for Children and Adults
Spouse Education and Career Counseling
State Support to the Guard and Reserve
Substance Abuse (addiction, recovery, etc.)
Transition to Civilian Life

TRICARE – Military Health Care Services Referral
Wounded Warrior Support (Health and Benefits Referral)
Youth Services

Additional troop and family assistance will be provided as identified by the DoD.

#### 4.0 CALL CENTER OPERATIONS

4.1 The Contractor shall provide staffing, business applications, and the technological infrastructure necessary to operate a 24/7 toll free Military OneSource Call Center. Contractor will ensure that a single number can be used by Service members and their families from any location world-wide to access the Military OneSource call center.

4.2 The Contractor shall hire military spouses to the maximum extent possible.

4.3 The Contractor shall describe procedures for recruiting, training, and retaining Military OneSource consultants.

4.4 The Call Center consultants shall have a minimum of a master's degree in social work or other human services fields, a minimum of three (3) years practical experience, and reflect the ethnic and cultural diversity of the military community

4.5 The Call Center service shall include back-up call centers with trained and experienced personnel and IT support capable of supporting toll-free stateside and international calls from Military OneSource Clients.

4.6 The Contractor shall provide both a schematic and a text description for call center operations that describe the call flow from initial call answered, process, call-back to Client and completion.

4.7 The Contractor shall describe the process flow for back-up operations centers necessary to handle call volume fluctuations or the emergency closure of the primary call center.

4.8 The Contractor shall describe, in schematic and text formats, the backbone to the primary and back-up call center.

4.9 The Contractor shall answer all calls live using masters level counselors. The Contractor shall answer 90 percent of all calls within 20 seconds of the first ring. The contractor shall not place a caller on hold for more than 5 minutes total duration. The contractor shall provide on a monthly basis, call center statistics including number of total incoming calls, total calls answered, number of calls answered within 20 seconds, number of calls abandoned, number of calls placed on hold in total more than 5 minutes, number of calls completed successfully (to the client's satisfaction), number of call backs completed.

4.10 The Contractor shall establish protocols and procedures for client usage of the website. Web site entry will be a user friendly approach that does not require log-in and can be accessed by Client simply identifying Military Service affiliation. Protocols must be approved by DoD, and include, but are not limited to, warm hand-offs (i.e., 3-way telephone call with Client, MOS and referral organization) to TRICARE, the military health plan; Wounded Warriors Resource Center; referrals to non-medical counseling providers; and referrals to subcontractors that are providing services within the Military OneSource suite of services. These protocols and procedures shall also include military community and family service agencies such as Army Community Services (ACS), the Navy's Fleet and Family, Marine Corps Community Services (MCCS), and Air Force Family Matters. The procedures for warm hand-off will ensure that client does not have to repeat their story or issue when the third party agency is engaged in the conversation. Similar protocols will be made to connect interested Clients to the various injured support programs as required.

4.11 The Contractor shall provide access to telephone and Internet services that meet the standards of Section 508, U.S. Rehabilitation Act. Access to these services shall include the capability to provide simultaneous language

translations. The translation services will be available for legal documents (leases, marriage licenses, adoptions, utility bills, legal documents, etc.).

4.12 The Contractor will create a customer-service atmosphere of respect and concern for every Service member or family member, regardless of grade, ethnicity, education, sophistication or problem.

4.13 The Contractor shall utilize a case management system that maintains Client confidentiality while still providing access to the Client's previous requests for assistance, caller-identifying information, Client concerns, and support provided to the Client. The case management system should eliminate the need for the Client to repeat basic information on subsequent calls. Case management system functionality shall include the Client requests for the contractor to assign a specific consultant to the case, whenever possible.

4.14 The Contractor shall develop and conduct initial and ongoing training for call center staff to familiarize staff with military customs, traditions, environment, benefits, and military programs. Call center staff shall be familiar with evolving issues that affect military members and their families.

4.15 The Contractor shall make outbound calls to specific groups within the served population. Follow-up calls will also be made to military members and families in order to ensure that services delivered met the requirements, needs and expectations of the caller. Normally, approval to call back must be obtained from the caller on their original call for assistance. Additionally, in order to meet the changing needs of the military members and their families and the Department – other specific call back services may be added. Monthly reports will include the number and type of call-backs made to Clients.

4.16 Call center operations shall be prepared to step-up staffing to assist with military contingencies such as a natural disaster, a national emergency or other catastrophic event. During such national or military emergencies, Military OneSource will be the central point of contact for Clients.

4.17 To ensure speed of access, operational efficiency, and integration of resources, the contractor shall operate a call center in the National Capital Region (NCR) and contractor shall operate a center for best practices for war fighter and family support, Wounded Warrior Resource Center and The Joint Family Support Resource Center. These activities are currently housed at 2109 Wilson Blvd, Suite 101, Arlington, VA and 2111 Wilson Blvd, Suite 300, Arlington, VA. These facilities may transition to the winning contractor upon award.

4.18 Contractor will designate call center staff to address issues and questions regarding inquiries on the health services, facilities, and benefits available for Wounded Warriors and their families, as directed by the National Defense Appropriations Act of January 2008. The Wounded Warrior Resource Center will serve the 25,000 plus Service members who face discharge every year for medical issues and another 30,000 Service members who find themselves on medical profile and who cannot perform their duties and face hurdles and obstacles in finding adequate care and assistance with a myriad of issues related to their injuries.

4.18.1 The resource center will be a clearinghouse that encompasses all materials, equipment, technology, and work space to support the Wounded Warriors and their families, to include the wounded members of the National Guard and Reserve and their families. Wounded Warriors must navigate a complex system of benefits, medical care, reintegration and possibly transitioning from military service to civilian. The center must be capable of handling large, dynamic information bases that cross federal, state and private boundaries. This center will be responsible to accommodate input from DoD, Veterans Affairs, Department of Labor and other federal agencies in the Washington, DC area.

4.18.2 The Resource Center must be contiguous with the Military OneSource Arlington, VA operation and must will work closely with Military OneSource for routine and frequent information exchange to institute this directed response to Wounded Warriors.

4.18.3 Oversight of contractor services and program development will be provided by DoD staff in the Wounded Warrior Resource Center.

4.18.4 Contractor will utilize an off-the-shelf Tracking System dedicated to the Wounded Warrior Resource Center that can be accessed on the Internet by multiple individuals. The Tracking System will be password protected. Passwords shall be issued by the Wounded Warrior Resource Center in collaboration with the contractor. Passwords issued to individuals outside of the Wounded Warrior Center will generally be limited to specific cases. The Government retains the option to provide software as government furnished materials.

4.18.5 All Wounded Warrior inquiries involving a report of deficiencies will be reported immediately to DoD officials, but not later than 8 hours from the receipt of the report.

4.18.6 Contractor will provide monthly reports to the government that include, at a minimum, the number of Service members and families served, services provided, updates to data base, hours of service, analysis of high risk cases and other requirements as identified by the government.

4.19 Based on the needs of the program and the Department of Defense, additional call center operations may be established as directed by the Contracting Officer in order to support emerging needs of military members and their families or the military mission. These may include separate call centers for DoD civilians and the parents of troops.

## **5.0 MILITARY ONESOURCE WEBSITE AND INFORMATION DELIVERY SYSTEM**

5.1 The Military OneSource web site is the face of the MOS system and the number one user interface, thus must be vibrant, colorful, and dynamic to attract a youthful audience. As the highest profile component of the MOS brand, the web site will reflect high standards of technology and will be reviewed and approved by DoD on a monthly basis. Changes to the web site requested by DoD will be performed within fifteen (15) days. Requests for additions/connections/links must be made by the Contractor within 24 hours of the request to stay current with DoD events. The web site will be managed by an experienced, professional web-master who resides in the Arlington, VA MOS call center.

5.2 The front page of the web site will offer Service members and their families three primary avenues of information: (1) Military (includes information of interest for single Service members); (2) Family Support, and: (3) Military Spouses. All information running behind the face of the MOS web site will be funneled into these three avenues. Many pieces of information will be duplicated in these three avenues, but the objective is to direct traffic into the areas of information most sought after by these three groups, i.e., single service members are not interested in spouse employment, however, might be interested in child care. Thus child care information is not located in the Military avenue, however, is located in the Family Support avenue. Another example would be relocation information, which would be located in all three avenues. Education services would be located in all three avenues but the content would be different, i.e., off-duty education information in the Military avenue, spouse career education information in the Spouse avenue, and dependent education information in the Family Support avenue. All avenues will contain both military specific information provided by the Department and vendor EAP information.

5.3 The Military OneSource Website shall provide numerous links to military, federal, state and community resources/organizations useful in providing information necessary to perform the scope of this work.

5.4 Military OneSource Website and email services shall have 98% online and email availability and shall have the capacity to grow expeditiously to meet increasing demand for service.

- 5.5 Military OneSource Website shall comply with Section 508 of the U.S. Rehabilitation Act requirements and content shall be available in both English and Spanish.
- 5.6 The design of the Military OneSource Website must reflect a military theme, be user-friendly and attractive to the young military population. Clients must be able to easily link to any of the Military Branches information, in support of their duty assignment.
- 5.7 The web site will contain weekly "Dear Military OneSource" advice column with questions from Clients regarding Military OneSource services. Contractor shall provide a means for Clients to submit a question electronically and provide a response within 30 days.
- 5.8 The Contractor shall provide a Military OneSource Website that uses current technology for navigation and functionality. The Websites shall be dynamic, providing ongoing updates to information and ongoing addition of new features of interest to the military community as those features become available. The web site must be updated daily with features of interest to the military community.
- 5.9 The web site will encourage the option, but not require, to personalize the content of Client Military OneSource web page, registration with Client e-mail and specialized newsletter push. The contractor shall make every effort to encourage Service members and their families to leave their e-mail address for future communications, to include the option to opt out of leaving their e-mail address.
- 5.10 The Contractor shall demonstrate to the Government that the primary Website, Military OneSource Online, has the capacity to service a large scale organization with a Client population of about 4 million individuals.
- 5.11 The Military OneSource Website shall provide locators for multiple programs, to include child and elder care; elementary, secondary, and college education and vocational training; relocation support; financial stability; recreation and other functional areas as required by the DOD. The Military OneSource Website shall also provide self assessment tools for employment skills, health and wellness issues, and calculators to assist in loan, mortgage, and other financial transactions.
- 5.12 The Contractor shall provide Web content in English and Spanish as well as a process for responding to emails in English and Spanish.
- 5.13 The Contractor shall provide security to protect the confidentiality, integrity, and availability of data in accordance with applicable Federal Laws, regulations, policies, and industry standards defined in accordance with, appropriate access control, comprehensive intrusion detection, comprehensive virus protection, formal incident response procedures, vulnerability monitoring and mitigation, and periodic third party security assessments to ensure on going effectiveness.
- 5.14 The Contractor shall provide a direct link from the Military OneSource website to the military installation databases and/or shall provide military installation information via the call center when website access is unavailable.
- 5.15 The COTR reserves the right to approve in writing all tools prior to posting on Military OneSource.
- 5.16 Protocols for Client usage of the web-site will be determined by DoD. Protocols will include a user friendly approach that does not require log-ins and can be accessed by the Client simply by identifying their Military Service affiliation.
- 5.17 IT Integration
- 5.17.1 The Contractor shall provide an IT Integration Plan that describes integrated systems for providing services to Clients.

5.17.2 The Contractor shall comply with Section 508 of the Rehabilitation Act for both voice and data services. At a minimum, compliance includes TDD/TTY (telecommunications device for the deaf); Interactive Voice Response Systems (IVRs)/Automated Attendants; voice mail systems; Websites; and information systems.

5.17.3 Contractor telephone integration shall include a process and a capability to use interpreter/translators for telephone calls in 150 foreign languages. Translation services will be offered on an immediate / on-demand basis to individuals calling the call center.

5.17.4 The Contractor shall, at the direction of the Government, perform Information Technology Updates (ITUs), to include programming/hardware/software support, as the program requires. The Government will identify ITUs required. The Contractor shall provide the Government with ownership, full rights and privileges to these ITUs, consistent with the clauses identified in this contract.

5.17.4.1 These requirements apply to each ITU task as a discrete item, as identified by the Government. The Contractor will comply with and apply the following requirements on an individual basis to each task.

5.17.4.2 The Contractor shall provide a development plan, with milestones and objectives, NLT 10 days following notification to provide an ITU.

5.17.4.3 The Contractor shall provide a draft version of the specified ITU NLT 20 days prior to the end date of the period of performance (POP), via the internet or CD/DVD, as appropriate and designated by the Government.

5.17.4.4 The Government shall have 10 calendar days for review, identification of changes and/or approval.

5.17.4.5 The Contractor shall submit the final versions in the form of CDs, NLT the last day of the POP.

5.17.5 Contractor shall ensure all data collection and storage systems provide for DoD level Information and System Security, protect the confidentiality, integrity, and availability of data in order of precedence with applicable Federal Laws, DoD regulations and policies, State law, and industry standards. Contractor shall ensure that all electronic data collection and storage systems are designed with access control, comprehensive intrusion detection, and comprehensive virus protection. Contractor shall develop and implement formal incident response procedures, vulnerability monitoring and mitigation, and periodic (at least annual) third party security assessments to ensure ongoing effectiveness. Annual third party security assessments shall be documented.

## 6.0 COUNSELING SERVICES

6.1 QUALIFICATIONS OF COUNSELORS: The counselors shall possess a broad range of Specialized Work Experience including: working with family programs and/or advocacy services, military or civilian social service agencies, and/or are a military family member with full understanding of the military lifestyle. For all types of counseling, experience with military family programs is preferred and an understanding of the military lifestyle is required.

6.1.1 All counselors must be licensed or certified and in compliance with industry accepted standards for the performance of non-medical counseling services. All counselors shall possess advocacy knowledge, skills, and abilities listed below:

- Working knowledge of military, state, federal, and local resources.
- Understanding, sensitivity, and empathy for Service members and their family members. Ability to develop trusting helping relationships. Ability to work effectively with individuals and families from diverse racial, ethnic, and socioeconomic backgrounds.
- Ability to intervene in crisis situations, using sound professional judgment, ethical practice, and common sense. Counselors must work independently to develop, implement, and evaluate safety and intervention plans to meet individual and family needs. Contractor must

agree to operate within established guidelines of the Military Services family support and quality of life programs.

- Ability to work cooperatively with military and civilian medical, social service, law enforcement, and legal personnel on behalf of Service members and family members.
- To the maximum extent possible, all counselors shall maintain a valid, unrestricted motor vehicle license.
- Counselors must be computer literate. They shall possess the basic computer skills to enable them to enter data in required management reports and utilize information systems to prepare required reports and information.

6.1.2 Counselors must have earned at least a master's degree in a mental health related field, such as social work, psychology, marriage and family therapy or counseling, and are licensed by a state to provide independent practice in their field. The non-medical problem solving counselors will meet the standards of professional and ethical conduct prescribed by their particular discipline or licensing board. They should have a minimum of a Master's degree in Counseling, Social Work, or Marriage and Family Therapy from an accredited graduate program; a valid, unrestricted counseling license/certification from a state or U.S. Territory that grants legal authority to provide counseling services as an independent practitioner in the fields of Social Work or Marriage and Family Therapy or similar counseling field; and demonstrated current counseling competence through at least periodic, direct service counseling experience during the two years preceding hire.

The non-medical problem solving counselor supervisors should have a minimum of a Master's degree in Counseling, Social Work, or Marriage and Family Therapy from an accredited graduate program; a valid, unrestricted counseling license/certification from a state or U.S. Territory that grants legal authority to provide counseling services as an independent practitioner in the counseling fields Social Work or Marriage and Family Therapy or similar counseling field; a minimum of two years' full-time counseling experience post-licensure; documented counseling supervision, oversight, and management experience; and demonstrated current counseling competence through at least periodic, direct service counseling experience during the two years preceding hire.

6.1.3 Financial Management Counselors shall have a minimum of a Bachelor's degree or an equivalent combination of education and experience. Financial management counselors shall maintain a national certification as an Accredited Financial Counselor in addition to the previously listed requirements. Contractor will follow government guidelines regarding employment and conflict of interest. Counselors must have strong skills in written and verbal communication, assessment, advocacy and crisis response. Counselors shall possess advocacy knowledge, skills, and abilities such as:

- Working knowledge of military, state, federal, and local resources.
- Understanding, sensitivity, and empathy for Service members and their family members. Ability to develop trusting helping relationships. Ability to work effectively with individuals and families from diverse racial, ethnic, and socioeconomic backgrounds.
- Ability to intervene in crisis situations, using sound professional judgment, ethical practice, and common sense. Counselors must work independently to develop, implement, and evaluate safety and intervention plans to meet individual and family needs. Contractor must agree to operate within established guidelines of the Military Services family support and quality of life programs.
- Ability to work cooperatively with military and civilian medical, social service, law enforcement, and legal personnel on behalf of Service members and family members.

- To the maximum extent possible, all counselors shall maintain a valid, unrestricted motor vehicle license.
- Counselors must be computer literate. They shall possess the basic computer skills to enable them to enter data in required management reports and utilize information systems to prepare required reports and information.

Contractor will provide licensed, certified financial counselors to assist Clients with personal financial readiness, money management, and budget counseling.

6.2 Counselors shall provide individualized planning and consultation services to Clients which include advice and assistance in such areas as clarifying needs in order of their priority, identifying immediate and long range measures to increase income, reduce household expenditures, avoid additional financial burdens; developing improved financial record-keeping, a personal budget and a financial plan to achieve solvency and stability; and fostering a recognition of the legal implications of indebtedness, and recommending legal assistance if warranted.

6.3 In cases of extreme financial hardship or threat of deprivation, contractor will ensure that troops and families are referred to the military Relief Societies, chaplains, and/or other state, federal, local and veterans' organizations via a warm-handoff.

6.4 Contactor shall provide (at a minimum) State and Federal (EZ, 1040, and 1040 Schedule A) electronic tax filing support that allows military service members to utilize the free tax services offered by the IRS via its web site. Military OneSource Clients will be able to link directly to the service.

6.4.1 Contractor is required to offer telephonic tax assistance counseling to assist Clients with their tax filing questions.

6.4.2 Contractor will develop a list of most frequently asked/answered tax questions and post these questions to the Military OneSource web site.

6.4.3 Contractor shall provide contact information to Military OneSource clients for the local military installation tax service support.

6.4.4 Contractor shall establish quality control procedures for tax service support.

6.4.5 Contractor shall provide a monthly status on usages, by month and cumulative, for state and federal filings and report this data IAW Monthly Status and Progress Report requirements under the Deliverables table. The contractor shall obtain Government approval of the tax assistance support plan prior to implementation.

**6.5 NON-MEDICAL COUNSELING.** The Contractor will make expert short term, situational, problem-solving counseling services available to troops, on demand. Contractor will offer through Military OneSource non-medical, problem-solving counseling on a face-to-face basis, telephonic and on-line. The counseling services will be designed to help troops and families cope with normal reactions to abnormal/adverse situations. The goal is to assess and deliver short-term, solution-focused counseling for service members and their dependents for situations resulting from commonly occurring life circumstances such as deployment stress, relationships, personal loss, parent-child communications, and to offer information and guidance on financial, education and career matters. Counseling for Service members and their family members provides an avenue for private, non-reportable discussion of personal life issues such as family difficulties and pressures, values, money management, spouse employment, crisis intervention, anxiety, self-esteem, loneliness, and critical life decisions on a one-to-one basis in the context of a confidential relationship.

6.5.1 Types of counseling provided will include, but not be limited to: individual, family and couples, group, educational, career, and financial. Counseling will assist clients to address situational, non-medical problems such

as: deployment stress, relationships, crisis intervention, stress management, non-clinical depression, grief after loss, financial management, spouse employment, occupational, and other individual and family issues requiring problem solving assistance.

6.5.2 During the initial contact with the Client, if the Client requests non-medical counseling, the contractor shall directly refer the Client to non-medical counseling immediately.

6.5.3 The Contractor shall provide resources and expertise in clinical non-medical issues such as stress, child rearing, family violence, teen relationships, death & grief, divorce, behavioral health and anger management, among others. In addressing such issues, the Contractor shall describe the use of contractor resources such as licensed mental health professionals, Substance Abuse Professionals (SAPs), Certified Employee Assistance Professionals (CEAPs), and other relevant credentials. Contractor shall verify licensing, certification and/or compliance with industry accepted standards for the performance of non-medical counseling services. Contractor shall provide Counselors with established protocols for counseling in the service/subject areas below. Services provided will include, but are not limited to:

<u>Emotional Counseling</u>	<u>Financial Counseling</u>	<u>Educational, Career, Employment Counseling</u>
✦ Well-Being	✦ Money Management	✦ School-Work/Grades
✦ Deployment Stress	✦ Financial Stability	✦ Spouse Career Goals
✦ Marital / Couples Issues	✦ Banking	✦ Spouse Education Goals
✦ Family Relationships and Concerns	✦ Credit Management	✦ Personalized assessment/analysis of skills and interests
✦ Homesickness	✦ Budget Counseling	✦ Provide information on occupations and salaries
✦ Making Friends	✦ Money Management	✦ Assess training and education interests
✦ Serious Illness in Family	✦ Debt Liquidation	✦ Career exploration
✦ Parenting	✦ Financial Record Keeping	✦ Assist with resume writing
✦ Child Care	✦ Saving and Investments	✦ Guidance on use of Internet to obtain employment
✦ Parent-Child Communications	✦ Insurance	✦ Assist with professional credentialing and licensure requirements
✦ Loss and Grief	✦ Management of Special Duty Pays	✦ Develop interview skills
✦ Conflict Resolution		✦ Assist with career planning and transitions
✦ Self-Esteem/Independence		
✦ Decision Making		
✦ Anxiety		
✦ Stress		
✦ Values/Life Meaning		
✦ Assertiveness		
✦ Anger		
✦ Individuation/Sense of Self		
✦ Friends/Roommates		
✦ Boyfriends/Girlfriends		
✦ Addictive Relationships		
✦ Binge Drinking		
✦ Social Issues		
✦ Perfectionism		
✦ Loneliness		
✦ Health & Wellness		

6.5.4 Situations meeting the diagnostic criteria for the most common mental disorders found in the Diagnostic and Statistical Manual of Mental Disorders – DSM-Latest Edition will be referred to TRICARE or other providers of professional mental health care.

6.5.5 With the exception of mandatory state, federal and military reporting requirements (i.e., domestic violence, child abuse, and duty to warn situations), Counseling will be private and confidential to encourage the widest level of participation.

6.5.6 Face-to-face Counseling sessions are limited to six sessions per presenting issue.

6.5.7 While civilian counselors will provide the non-medical counseling, the Contractor shall ensure that from the initial call and follow-up to Military OneSource through the experience with the non-medical counselor, the Client is aware that Military OneSource and the counseling services are an extension of the resources offered through the military community.

6.5.8 The Contractor shall utilize a case management system that protects the Client's confidentiality/privacy while providing the necessary functionality for access to data regarding previous contacts and services provided, issues presented, ongoing documentation, and elimination of the need for repeating general information.

6.5.9 The Contractor shall attempt to satisfy Client preferences regarding age, gender, culture, and language when providing referrals for non-medical counseling.

6.5.10 The Contractor shall establish protocols and procedures for assessment, referral, and case management of Clients in need of non-medical counseling services.

6.5.11 The Contractor shall provide referrals to a National Network of trained, experienced, and credentialed providers with master's level degrees or higher in counseling or other social service related fields.

6.5.12 The Contractor shall implement a National Network that provides non-medical counseling available to Clients. The Contractor's National Network shall assure access to face-to-face counseling for Clients

6.5.12.1 All employees, contractors, and subcontractors who will have access to client information will be advised of the confidential nature of the information, that the records are subject to the requirements of the Privacy Act of 1974, and that unauthorized disclosures of client information may result in the imposition of possible criminal penalties.

6.5.12.2 Contractor shall establish and maintain a record keeping system that is designed to protect the Service member or family members' privacy and confidentiality, as appropriate and required for specific services. Written records of the content of the counseling session must be maintained by the counselor only when required by a specific military Service in coordination with the Office of the Secretary of Defense (OSD) guidance. Although this counseling is private and confidential, the contractor must keep utilization records which document that confidential and private services have been provided to Service members and their families. The counselor must explain to the Service member or family member that the personal identification information will be held in strictest confidence by the contractor. The Contractor shall capture selective contact and demographic information, to include ensuring that Clients meet Military eligibility criteria, while ensuring Client confidentiality, in a database/s and provide monthly reports detailing non-medical counseling services, that includes at a minimum, the duty status and rank of counseling participants, type of counseling (i.e., marital, grief & loss, parenting, communications, financial, etc), number of sessions, distance of counselor from residence of participant and other data points as required by the government.

6.5.13 The Contractor will identify components for Quality Control that will ensure delivery of performance of non-medical counseling services.

6.5.14 The Contractor, in concert with DoD, shall maintain appropriate DoD, State and local Duty to Warn protocols (threat of harm to self or others, to include domestic violence and child abuse), in the event that a Client's call reveals such a threat. Monthly reports will include a summary of each Duty to Warn case.

6.5.15 The Contractor shall maintain procedures for responding to Emergency, Urgent, and Non-urgent calls. These procedures shall include an immediate response for Emergency situations, access to non-medical counseling within one business day for Urgent calls, and access to non-medical counseling within three business days for Non-Urgent calls.

6.5.16 The network shall be sufficient to ensure Client waiting periods for access to counselors do not extend beyond the requirements of 6.5.15.

6.5.17 The Contractor shall maintain a counseling model and process flow for Military OneSource non-medical counseling.

6.5.18 The Contractor shall maintain procedures for recruiting, training, and managing a network of non-medical counselors for Military OneSource clients. Training shall include ongoing familiarization with issues relevant to members of the military community. The Contractor shall describe qualifications, experience, and credentialing requirements for counselors.

6.5.19 Contractor shall provide Health and Wellness coaching designed to assist service members and their families in improving their health. The program will include a lifestyle health assessment, personal goal setting and coaching, and incentives to assist Service members and families attain and maintain their health and wellness goals.

**6.6 SPOUSE CAREER COUNSELING** – Contractor will establish a call center dedicated to education, career and employment counseling services for military spouses world-wide. Contractor will maintain a separate call center to address issues and questions regarding Military Spouse education and career counseling initiatives. Contractor will assist spouses in learning about Military Career Advancement Accounts (CAA) and provide information regarding eligibility, education and employment questions received via telephone and/or from the internet. Contractor will also advise military spouses regarding federal, state and local career licenses and certifications requirements in portable career fields of education, health services, information technology, financial services, construction and any other portable careers suitable for military spouses. When indicated, refer spouses appropriately to the Military Services Education Office/Navy College center, installation Family Center or local One-Stop Career Center. The contractor shall assist spouses in completing their online CAA application. The contractor shall establish and maintain advising records/notes for program participants via a secure intranet application that allows Call Center staff to enter and view notes related to spouse Call Center support. Counselors in the call center will be available from seven am until ten pm (7am-10pm) eastern time for telephonic appointments with spouses living overseas.

6.6.1 Call Center counselors will provide spouses a personalized assessment/analysis of skills and interests; assessment of training and education interests and assist with career exploration and job attainment. Services will include, but are not limited to:

- Assistance with evaluating educational and training goals
- Plan appropriate aptitude testing in accordance with needs and desires
- Assist in planning academic life and career goals
- Provide information regarding specializations and levels of training required by educational and career choices
- Provide information regarding career credentialing and licensing requirements across state boundaries
- Identify appropriate educational resources and costs to include campus and on-line resources
- Identify projected salary/compensation by full range of careers
- Follow up with spouses entering educational/training programs
- Link to US Department of Labor and the State resources
- Develop data banks of educational institutions, financial costs, career requirements, salary projections and credential/license requirements and other aspects of education goals.

- Assist with resumes
- Assist with locating employment

6.6.2 Counselors shall provide spouses guidance on the use of the internet to obtain employment; assist with professional credentialing and licensing requirements; develop interview skills and provide information on occupations and salaries; and assistance with career planning and transitions.

6.6.3 Contractor's immediate focus will be on providing Military Career Advancement Account (MCAA) career education and training advisory services. Call center will collaborate with the DoD program managers of the MCAA initiative to provide services. Initial focus shall be on, but not limited to, the portable career fields of:

- Health Services
- Information Technology
- Education Services
- Financial Services
- Construction Trades (plumber, electrician, carpenter, etc)
- Human Resources
- Business Management
- Hospitality Management
- Homeland Security

6.6.4 Contractor will acquire a working familiarity with the state OneStop Career Center Programs in each state for employment purposes.

6.6.5 Contractor will focus educational and career counseling on portable careers to include education requirements, salary potential, portability of career choices, licensing and credentialing requirements and associated costs, assistance with resume preparation and employment.

6.6.6 Contractor will establish and maintain a summarized record of contact with each Client calling. Client may call back and not have to repeat previously provided information or status of education/career direction.

6.6.7 Contractor will call Clients back to obtain and document Client program progress

6.6.8 Contractor, in concert with DoD, will develop protocols and scripts for use in communicating with military spouses regarding education/training/licenses/credentials.

6.6.9 Contractor will report monthly contacts and referrals by state, installation, educational institution and career field.

6.6.10 Contractor will, in concert with DoD, develop tuition assistance platform to arrange for payment to institutions providing education and training.

6.6.11 Contractor will assist clients with job search and placement.

## **7.0 GENERAL EDUCATION/ INFORMATION MATERIALS**

7.1 The Contractor shall create, develop, produce, and acquire educational and informational materials (books, CDs, games, etc.) related to the full range of Military OneSource services, to include DoD program materials for Clients. Clients will be able to order these materials through either the Military OneSource toll-free telephone number, the Military OneSource Website or download the requested materials electronically. The vast majority of materials will be downloadable. The Contractor shall ship materials to Clients within 24 to 48 hours from the receipt of request for materials.

7.2 The Contractor shall have the capability to develop and distribute targeted informational materials to meet national or command level crisis or emergency needs, e.g. hostage situations, epidemics, etc.

7.3 Contractor will ship materials (such as CDs, books, games, books on tape, etc) purchased by the Government to Clients stationed world-wide.

7.4 The DoD and the Military Departments shall make electronic versions of documents available to the contractor for electronic and/or hard copy distribution to Clients. The Contractor shall establish procedures for coordinating with the Military Departments on an efficient electronic update process. Contractor shall convert material to e-version as much as possible and use electronic distribution as a first priority delivery system.

7.5 Contractor shall provide educational and informational materials normally provided as a part contractor EAP support services. Contractor shall create, develop, produce, and provide educational and referral information materials for those issues and services of specific interest to service members and their dependents.

## **8.0 MILITARY ONESOURCE CENTER**

8.1 Contractor shall staff and operate a Military OneSource Center with responsibility for research, development and design of effective programs to support improvements to the quality of life of military troops and families to support the delivery of information and services through Military OneSource. The environment in which military families live is complicated, complex and ever-changing and requires a dynamic support system.

8.2 The Center will be staffed by up to 120 professionals (i.e., social scientists, researchers and program developers) with responsibility for development of programs that address and ameliorate the stressful impact of the military lifestyle on troops and families, provide support to troops and families with managing work-life balance and identify and promulgate best practices. Contractor is responsible for hiring personnel. Government will approve contractor hires for program development.

8.3 The Center will conduct ongoing research and identify best practices to assure the consistent delivery of high quality services to the Clients. The Contractor shall recruit and hire subject matter experts for child care, financial services, spouse education, credentials and careers, training, research and development, wounded warriors, advertising, joint family assistance support to the state Guard and Reserve units, and other subject areas as identified by DoD. These individuals will gather and analyze data and resources, conduct training, research and development for the Military OneSource program.

8.4 The Center will be housed in the Arlington, VA area in a facility that accommodates approximately 120 staff and training capacity for approximately 50 staff daily.

8.5 Government personnel will provide day-to-day oversight and guidance of program development and for performance management.

## **9.0 CASE MANAGEMENT**

9.1 Contractor shall provide a case management system capable of sharing data (import and export) in an Open Database Connectivity (ODBC) compliant format for use by the Military OneSource Program and other QOL programs. Client information shall be maintained on the Military OneSource 1-800/Website contractor's Case Management System. The 1-800/Website contractor shall post all case summaries on the case management system within three (3) business days of receipt of case information from each source. The Face-to-Face, Problem-Solving Counseling contractor shall have three (3) business days after the completion of the client's final counseling session to provide the information to the 1-800/Website vendor for input into the case management system. The case management system shall be capable of maintaining Client confidentiality while still providing access to the Client's previous requests for assistance, caller-identifying information, Client concerns, and support provided to the Client.

9.2 Contractor case management system shall be capable of automatically populating an on-line data base of usage.

Usage data may be updated to meet DoD information needs. Contractor will prepare detailed utilization reports for each Military Service and installation. A separate DoD monthly report will include a trend analysis that compares the Military Service branches utilization in all categories, including subcategories by calls, e-mail, internet, counseling, etc. The Department and Military Services must have adequate knowledge, such as the breakout of the types of problems for which service members and their families are seeking assistance and analysis of utilization, to use in program development and targeted marketing. Reports from the web-based/web-enabled case management system shall be able to produce on-call; on-demand reports that allow the government to track usage, caseload, types of cases and other critical management and information needs as required by DoD. Reports will be available on-line and should also be available as both Microsoft and Excel product. Case management will support DoD reporting requirements.

## **10.0 PROGRAM MANAGEMENT**

10.1 The Contractor shall establish a dedicated program management team to assure the consistent delivery of high quality services to the Clients. The team shall include, at a minimum, a program director with the authority to speak and act on behalf of the contractor with DoD and a program director assigned to work directly with the COTR. This team shall be responsible for all services delivered; the management of subcontractors; and supervise development and implementation of Military OneSource overall.

10.2 Contractor will provide an on-site Military One Source Service Program Manager to each of the four Military Services headquarters to coordinate Service specific requirements.

## **11.0 PROGRAM DEVELOPMENT**

11.1 Training and Education for Active Duty, National Guard and Reserve Component Staff.

11.1.1 Contractor shall hire one program manager for each state to support increased outreach and coordination with Guard and Reserve as military operations and the War on Terrorism dictate. These program managers will act as liaisons between Military OneSource and DoD in states supporting the Joint Family Support Assistance Program.

11.1.2 Contractor shall hire a Director for the Joint Family Support Assistance for the Guard and Reserve Program.

11.1.3 Contractor shall assist DoD in organizing and conducting regional training for staff to include two overseas locations. There shall be six CONUS training sessions of three days for 200 participants and two overseas sessions for up to 100 participants each.

11.1.4 Contractor shall support emerging Military Service or OSD training requirements.

## **12.0 RELATIONSHIP MANAGEMENT**

12.1 Contractor shall provide Relationship Managers, to be assigned to the Military Services and to each installation. Relationship managers are responsible for utilization and trend analysis at the Service and installation level and to work with a designated installation representative to discuss strategies to increase installation MOS utilization.

12.2 Contractor shall provide orientations or other installation visits regarding Military OneSource services. The goal of these services will be to increase awareness and utilization of the program. Priority is for Guard and Reserve units. Schedules for the next calendar month will be submitted NLT the 20th of the preceding month for approval. Travel associated with these orientation visits shall be in accordance with the Joint Travel Regulation and pre-approved by the COTR. The Government reserves the right to make changes to the scheduled visits based on the needs of the military.

### **13.0 QUALITY ASSURANCE**

13.1 The Contractor shall design and implement a Quality Control Plan that ensures Military OneSource Clients receive the highest quality services possible. The Contractor shall establish quality control procedures for all Military OneSource operations. This plan will be in contractor format.

13.2 The Contractor shall identify within the Quality Control Plan the measures necessary for monitoring performance for all Military OneSource operations.

13.3 The Contractor shall provide records and reports that document Client satisfaction and utilization levels.

13.4 The Contractor will identify components for Quality Control that will ensure highest performance delivery of non-medical counseling services.

### **14.0 DISASTER RECOVERY**

Contractor shall maintain effective disaster recovery capabilities for all Military OneSource operations and systems (1-800 Call Centers, Websites and Case Management System) to ensure continuity of services. In the event of a disaster, either natural or man-made, the contractor shall be able to maintain normal operations with no downtime or loss of data. Contractor shall develop and implement procedures to address organizational policy for system recovery. Contractor shall develop a test plan and execute it at least annually to ensure that recovery is achievable. Based on the test results, the plan should be modified if required. The contractor shall provide a description of the company's current disaster recovery approach and plan, when it was last tested, and type of testing performed.

### **15.0 MILITARY CONTINGENCIES/SURGE**

Other Counseling or Advocacy shall be provided regionally to assist with military contingencies. The Contractor shall provide a network of counselors to advocate for service members and families in distress. The network of counselors shall be available within reasonable proximity (<100 miles) of all CONUS military installations. In the event of OCONUS contingencies impacting military families, contractor may be required to provide counselors at overseas locations on a temporary basis (not to exceed 180 days). The Government will notify the contractor when activation of the network in a specific area is necessary.

### **16.0 TRAVEL**

16.1 All Travel will be approved in advance by the Contracting Officer and be in accordance with current Joint Travel Regulations (JTR). Overseas Travel shall be in accordance with the provisions of the Department of Homeland Security and this contract. All travel must be approved in advance by the government.

16.2 Approval of Foreign Travel. The cost of foreign travel is allowable only when the specific written approval of the Contracting Officer is obtained prior to commencing the trip. Each individual trip must be approved separately, even though it may have been included in a previously approved budget. Foreign travel under this contract is defined as any travel outside of the United States and its territories and possessions.

### **17.0 MONTHLY REPORTS**

17.1 The Contractor shall deliver a Monthly Progress Status Report and a Financial Disbursement Report. Submission shall be due monthly beginning on the 15<sup>th</sup> of the month following contract award and on the 15<sup>th</sup> of each month thereafter throughout the period of performance.

17.2 The Government will have ten (10) days for review and acceptance/rejection.

17.3 Submissions shall be in Windows XP (Word or Excel) format and sent via email.

17.4 The Contractor shall capture and report all Service Member and Family Member contacts by Military Service and installation, Service member or family member, to include Guard and Reserve, on a monthly basis. The contractor shall not collect or maintain any health privacy information covered by HIPAA <http://www.hhs.gov/ocr/privacysummary.pdf>.

17.5 Required Data in Report – The Monthly Progress Report shall include, but will not be limited to (see Section J attachment required report).

#### 17.5.1 Program Report

17.5.1.1 Narrative executive summary of work accomplished during the reporting period.

17.5.1.2 Problem areas or issues that have been identified during the period and resolution action taken if any.

17.5.1.3 Attached to this report will be copies of any reports (informal and formal) that have been provided to any DoD organization during the period. Individual Military Service Branch and installation reports will be prepared and submitted monthly.

17.5.1.4 Contractor will report summary on each Duty to Warn case to include Military Branch and a brief narrative of the situation requiring Duty to Warn.

17.5.1.5 The Contractor will report the number of Military OneSource Clients (Service Member, Family Member and military branch (active Service, Guard or Reserve) using following services:

17.5.1.5.1 Tax support service to reflect type package (Basic/Deluxe) as well as the number of State filings. The Contractor will report the consultant support (both tax and tax triage) hours used, the number of clients they supported and a general categorization of the support they provided.

17.5.1.5.2 Non-medical counseling to include number referred, number sessions, type (individual, group, face-to-face, telephonic, e-mail)

17.5.1.5.3 Child Care Referrals

17.5.1.5.4 Call Center Statistics (including sub-sets of Spouse Education and Counseling

17.5.1.5.5 Call Center and Wounded Warrior Call Center

17.5.1.5.6 Client Call Back Statistics

17.5.1.5.7 Web Site Utilization Statistics (including number of unique visitors, length of time on site, areas visited, etc.)

17.5.1.5.8 Counseling statistics (number referred, number receiving counseling)

17.5.1.5.9 Contractor will submit on the 15<sup>th</sup> of each month the attached report, to which other requirements may be added by the Government.

#### 17.5.2 Financial Disbursement Report

17.5.2.1 The Contract Fund Status Report will include the amount invoices to date, the amount received in payments to date, the amount that has been invoiced but not paid and the funds remaining not invoiced.

All information will be reported by CLIN/SLIN.

17.5.2.2 Cumulative hours expended throughout the reporting period by job category

17.5.2.3 Staffing Status Report by Business Activity for which vendor is billing the Department Services to include activated on-call or on-demand activities.

### **18.0 MILITARY ONESOURCE PROGRAM TRANSITION**

18.1 The Contractor shall provide a plan that defines the contractor's capacity and capability for an orderly and seamless transition for the delivery of the Military OneSource Program to be operational not later than 90 days after contract award. Current contractor is responsible for maintaining current web site and call center operations for 90 days post award.

18.1.1 Contractor will replicate the design and content of the current Military OneSource web site and Call Center(s).

18.2 The Transition Plan shall discuss the process for transferring services and associated data.

18.2.1 Web-site will be operational for DoD review and approval no later than 60 days after contract award.

18.2.2 Call center will respond to 25 percent of incoming calls no later than 30 days after contract award.

18.2.3 Call center will be fully operational for DoD review and approval no later than 60 days after contract award.

18.2.4 Content of Education and Information materials (for Client download or mailing) will be available for DoD review no later than 60 days after contract award.

18.3 The Transition Plan shall identify quality assurance measures that will allow the Government to exercise its responsibilities for monitoring contractor performance. In addition, the Contractor shall comply with the requirements below and, identify any transition risk factors and plans for managing those risk factors.

18.3.1 The contractor shall provide a plan that defines the contractor's capacity and capability for an orderly and seamless transition for the delivery of the Military OneSource Program with proposal submission and within 5 days of any changes post-award.

18.3.2 The Government will have THIRTY (30) CALENDAR DAYS for review and acceptance / rejection.

18.3.3 The Contractor shall provide status reports/updates in parallel with the monthly reports immediately following Government approval of the transition plan. Status reports/updates shall include the status on deliverables as proposed and approved in the transition plan.

18.3.4 Submissions shall be in Contractor format using MS Office 2000 (WORD), sent electronically

## **19.0 OWNERSHIP OF MILITARY ONESOURCE (MOS) LOGO, WEB ADDRESS, 1-800 TELEPHONE NUMBER AND OTHER MOS RELATED MATERIALS**

The MOS logo, the web address, the website and all of its contents, materials in front of the secure sign-in on the web site, all materials developed at the direction of the government, the 1-800 telephone contact line and all MOS materials that are not used with the vendors' civilian clients are considered property of the government. However the vendor may retain use of such products as long as it is clearly understood that such products will continue to be used by the government to serve its military client.

19.1 GOVERNMENT TECHNICAL DATA, COMPUTER SOFTWARE RIGHTS AND RIGHTS IN WORKS. The Government shall retain unlimited rights (See DFARS 252.227-7013 and 7014) to the software and technical data developed under this contract that are not otherwise designated as "works" by the Contracting Officer, with "works" as defined in DFARS 252.227-7020.

19.2 COMMERCIALY OR INDEPENDENTLY DEVELOPED SOFTWARE. The Offeror shall ensure that the license for the software necessary for performance of the work is transferrable to the Government, upon request of the Government, at no additional cost. The Offeror shall prepare a plan to transfer the software and licenses to the Government upon completion or termination of the contractor's performance.

## **20.0 ORGANIZATIONAL AND CONSULTANT CONFLICTS OF INTEREST**

20.1 It is recognized by the parties hereto that the effort performed by the contractor under this contract is of a nature that it creates a potential organizational conflict of interest as defined in FAR Subpart 9.5.

20.2 In the performance of this contract, the contractor may have access to data which is procurement sensitive or is proprietary to other companies, Government consultants or advisors, or the Government. The contractor agrees that it will not utilize such procurement sensitive or proprietary data in performance of future competitive contracts, for studies in the same field, procured either through sealed bids or competitive negotiations. The contractor further agrees not to act as a subcontractor or consultant to any other prime contractor or subcontractor seeking to utilize such data.

20.3 The contractor will include the provisions of the above paragraphs in every first tier subcontract for performance of any portion of this requirement.

## **21.0 SAFEGUARDING PROPRIETARY INFORMATION**

21.1 "Proprietary information" shall mean all information, whether disclosed orally, in writings, by drawings, or otherwise relating to the work to be performed under this contract, whether proprietary to the Government or one of its collaborating partners. Proprietary information includes, but is not limited to, information regarding properties, formulae, structures, manufacturing processes, and test results. Information ceases to be proprietary when it is generally available to the public or is available from sources other than the Department of Defense. All information submitted to the contractor under this contract shall be presumed to be proprietary to the Department of the Defense until the Department of the Defense announces to the contrary.

21.2 The contractor shall safeguard proprietary information both during and after the term of this contract, and shall neither appropriate, nor disclose, nor make unauthorized use of the proprietary information received under this contract. The requirements of this paragraph include, but are not limited to, the following:

- (1) Maintenance of a high degree of physical security over proprietary information at all times;
- (2) Discussion of proprietary information only among contractor's employees whose duties and responsibilities require knowledge of that information; and,
- (3) Elimination of proprietary information in open publications by the contractor and its personnel.

21.3 The contractor shall require all personnel who receive proprietary information to execute the statement in the paragraph below when this contract becomes effective or when first employed (if employed after the contract becomes effective). All statements executed pursuant to this paragraph shall be forwarded upon request of the Contracting Officer.

21.4 The following statement shall be executed pursuant to the paragraph above:

I hereby acknowledge that I have been informed that my duties may require that I have access to proprietary information. I understand this proprietary information which I will receive includes, but is not limited to, properties, formulae, structures, protocols, manufacturing processes, and test results.

I agree that I will neither appropriate nor disclose nor make unauthorized use of proprietary information both during and after my employment. I further agree that I will neither include nor draw upon proprietary information received under this contract in open publication. This agreement is executed with the intention that collaborating partners of the United States Government who have submitted information to the Government under non-disclosure obligations shall be third party beneficiary hereunder, and shall have the right to enforce the obligations undertaken herein.

Job Title:	Military OneSource Relationship Manager
Facility:	Virtual
Dept Name / Number:	Government, Client Services
Reports to:	VP, Client Services
Effective Date:	Immediately

Primary purpose:

Program Manager leads ongoing growth/maintenance of the Military OneSource service within a specified Service component, OSD program area, and key content areas. Program Manager works directly with military contacts to ensure efficient and effective delivery of service. Program Manager is responsible for day to day maintenance of program delivery and contract requirements with emphasis on program awareness, utilization, and innovation.

**Major Responsibilities:****Establish and maintain relationships with customer contacts**

- Establish working relationships with key contacts within assigned Service component. Some examples include, Service POC (SPOC), various Branch program managers (Child and Youth, FAP, etc), installation contacts for each installation within assigned component.
- Establish working relationships with key contacts within assigned OSD program area.
- Maintain POC information for each region and site (installation, base, etc), including but not limited to: name, rank/title, phone, fax, e-mail, mailing address.
- Maintain/grow database of contacts within the assigned Service component. Database should include all pertinent contact information as above.
- Maintain minimum of twice monthly contacts with main and primary contacts. Duties include: collection of contact installation and program information and ensuring information is available in Military OneSource call center and on-line, Marketing Military OneSource services, staff training, curriculum development, reporting on the progress of all current projects, arrange conference line, confirm timing, take notes, and send out action items at the conclusion of meeting.
- Review and track Service and installation monthly reports with main and primary contacts.
- Document contacts for contract reporting purposes.
- Identify databases and information that needs to be developed to meet local needs at the installation level, help identify and or respond to concerns of participating installations and provide subject matter expertise.
- Obtain immediate information on crisis events from component or site POC to have the latest approved information for release to callers inquiring about local or national crisis response services.

**Serve as a content and service delivery expert in designated areas**

- Work with service delivery representatives, OSD Program Directors and Content Manager to determine Service member/Family member (SM/FM) needs for assigned content areas.
- Assist in finding/recruiting subject matter experts to review content for assigned area.
- Develop new service offerings for assigned content area based on SM/FM needs.
- Work with Military OneSource Online content specialist to add government provided/internally developed content to assigned content areas.

**Review, maintain, analyze and distribute monthly/semi annual/annual usage report**

- Work on enhancement of monthly report package to meet customer needs.
- Review each report package for accuracy. Work with Reporting Manager to resolve any issues that are noticed.
- Send monthly report to main contact and schedule time to review contents. Each month provide a summary of the monthly highlights.
- Distribute report packages to regional and local POC's as directed by SPOC. Include overall highlights and any site specific highlights that might be pertinent.
- Conduct an initial report review with every POC to be sure they understand how to read and pull information from the report.

21.5 The contractor shall insert the substance of the above paragraphs in each subcontract hereunder. Compliance with the provisions of this clause shall be the responsibility of the contractor.

**22.0 ASSOCIATE CONTRACTOR AGREEMENT (ACA)**

22.1 The Contractor shall develop ACA(s) with designated Government contractors supporting the Office of Military Family and Community Policy QOL programs, as applicable.

22.2 The Contractor shall establish an ACA with other designated QOL contractors to protect proprietary data/information, to stipulate as to the use of proprietary information, and to assure proprietary information will not be divulged inappropriately. Specific requirements will be included in the ACA.

22.3 The Contractor shall submit all ACA(s) to the Government for review prior to execution. Following Government concurrence and signature by the associate contractors. The ACA(s) are for information purpose only and shall not be subject to or governed by this contract. In the event of a conflict between the terms of this contract and terms of the aforesaid agreement, the terms of this contract shall take precedence.

### **23.0 PERFORMANCE INCENTIVE OPTIONAL PLAN**

The performance incentive option plan provides for the evaluation of performance, and serves as the basis for decisions on whether the exercise of a monetary performance payment award may be considered by the Contracting Officer. The monetary performance payment award may be bilaterally revised at least sixty (60) days prior to the commencement of any option evaluation period. Any changes to the performance incentive option plan will be made in writing and incorporated into the contract through a bilateral modification citing this clause.

The Government shall monitor this effort according to the terms outlined in the QASP. At the end of each six-month period, within 30 days of receipt of the monthly reports, the Contracting Officer will determine if the contractor met the incentive goals for that period. The contractor must meet all of the acceptable quality level(s) (AQL) outlined in the Quality Assurance Surveillance Plan (QASP) during the appropriate period in order to receive the monetary performance award. There are no partial incentive awards.

For each period that the contractors meets the AQL s outlined in the QASP, the Section B.1 Consideration and Payment clause will be amended to reflect increased fixed prices for each option period as follows:

Base Period	one payment of \$250,000.00 at the conclusion of the base period
Option Period I	one payment of \$250,000.00 6 months after option exercise one payment of \$250,000.00 at the conclusion of the option period
Option Period II	one payment of \$250,000.00 6 months after option exercise one payment of \$250,000.00 at the conclusion of the option period
Option Period III	one payment of \$250,000.00 6 months after option exercise one payment of \$250,000.00 at the conclusion of the option period
Option Period IV	one payment of \$250,000.00 6 months after option exercise one payment of \$250,000.00 at the conclusion of the option period
Option Period V	one payment of \$250,000.00 at the conclusion of the option period
Sum Total of All Incentive Payments is	\$2,500,000.00