

SECTION C – DESCRIPTIONS AND SPECIFICATIONS – AMENDMENT # 0003

**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 6 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 them. The Department intends to make expert telephonic consultation, referral, and information services and short term, situational, problem-solving counseling services available to troops and their families, on demand.

The 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 these 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.

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 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 interface development/operations providing expert information/referral and educational/consultation services; educational/information materials; non-medical counseling services; the Military OneSource Center to include research and program development; the Wounded Warrior Resource Center; the Military Spouse Career Advancement Call Center and the Joint Family Support Assistance Program. Information/referrals and education/consultation services shall cover the full range of quality of life 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.

2.0 APPLICABLE DOCUMENTS AND REFERENCES

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>
- 2.4 www.militaryhomefront.dod.mil
- 2.5 <http://www.bgca.org/partners/military/>
- 2.6 www.national4-hheadquarters.gov/comm/4h_military.html
- 2.7 <http://www.health.mil>
- 2.8 <http://www.milspouse.org>
- 2.9 <http://www.military.com/spouse>
- 2.10 <http://www.naccrra.org/MilitaryPrograms/.org>
- 2.11 <http://www.1800goguard.com/car/index.php>
- 2.12 <http://www.mfri.purdue.edu/>
- 2.13 <http://www.dodea.edu/home/index.cfm>
- 2.14 <http://www.commissaries.com/>
- 2.15 <http://www.aafes.com/>
- 2.16 <http://www.usmc-mccs.org/>
- 2.17 <http://www.armymwr.com/>
- 2.18 <http://www.mwr.navy.mil/>
- 2.19 <http://www.afsv.af.mil/>
- 2.20 www.jhsph.edu/mci
- 2.21 <http://military.adoption.com>
- 2.22 <http://www.adoptuskids.org>

3.0 REQUIREMENTS

MILITARY ONESOURCE PROGRAM

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, maximizing the use of military spouses, wounded warriors and veterans, 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. Information and referral 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 MISSION REQUIREMENTS

A. MISSION EXECUTION TASKS

TASK 1 CALL CENTER/WEBSITE OPERATIONS, CASE MANAGEMENT, REPORTS, DISASTER RECOVERY AND GENERAL EDUCATION/ INFORMATION MATERIALS

4.1 MOS CALL CENTER OBJECTIVE To encompass 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.

4.1.1 MOS CALL CENTER MINIMUM REQUIREMENTS

4.1.1.1 The Contractor shall provide staffing, processes, procedures, and the technological infrastructure necessary to operate a 24/7 toll free Military OneSource Call Center. The call center shall be physically located in the National Capital Region (NCR), with easy access to public transportation.

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

4.1.1.3 The 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. The contractor's technical infrastructure provides back up call center capability instantaneously. The Call Center service shall include redundant back-up call centers with trained and experienced personnel and technical support capable of supporting toll-free stateside and international calls from Military OneSource Clients. There is a minimum of two call centers for this requirement. One must be in a geographic location unlikely to be impacted by a natural/man made disaster in the other. The contractor shall provide the ability of OCONUS callers to access country specific numbers for both toll free and collect calls, which shall be available on the Military OneSource webpage.

4.1.1.4 The contractor shall provide on a monthly basis, call center statistics including, but not limited to, 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 duration of more than 5 minutes, number of calls completed successfully (to the client's satisfaction), number of call backs completed.

4.1.1.5 The Contractor shall make outbound calls to specific groups within the served population. Follow-up calls will 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, their families and the DOD – other specific call back services may be added.

4.1.1.6 The contractor's technical infrastructure supports translation/interpretation. Contractor telephone integration shall include a process and capability to use interpreter/translators for telephone calls for languages as described in Attachment C. Translation services will be offered on an immediate / on-demand basis to individuals calling the call center. Translation services will also be available for legal documents (leases, marriage licenses, adoptions, utility bills, legal documents, etc.) within 3 business days.

4.1.1.7 The contractor's telecommunications system provides TDD/TTY capability.

4.1.1.8 The contractor's telecommunications system provides the ability to trace calls.

4.1.1.9 The contractor's system is fully compliant with Section 508 of Workforce Investment Act of 1998 for both voice and data services.

4.1.1.10 The contractor's telecommunications infrastructure supports real time reporting of telephone service levels.

4.1.1.11 The contractor's telecommunications infrastructure can support additional call volume.

4.2 MOS WEBSITE OBJECTIVE: The Military OneSource web site is the face of the MOS system and the number one form of client interface, thus must be vibrant, colorful, dynamic and engaging to attract a youthful audience. The target audience for the website is service members and their families 18-35 years of age, and also their school age children and teens. 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. Web site entry will be a user friendly approach that does not require a log-in and can be accessed by Client simply by identifying Military Service affiliation.

4.2.1 MOS WEBSITE MINIMUM REQUIREMENTS

4.2.1.1 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) Guard and Reserve Support, and: (3) Family Support. 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 and dependent education information in the Family avenue, and tuition assistance and MGIB information in the Guard and Reserve avenue. All avenues will contain both military specific information provided by the Department of Defense and vendor EAP information.

4.2.1.2 The Military OneSource Website shall provide links to military, federal, state and community resources/organizations useful in providing information necessary to perform the scope of this work. Clients must be able to easily link to any of the Military Branches (Army, Navy, Air Force, Marine Corps) information, in support of their duty assignment, particularly joint assignments (i.e., Army Service member assigned to a Navy installation).

4.2.1.3 The contractor's website must contain the capability for user personalization. The contractor shall provide a website that can be and encourages users 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.

4.2.1.4 The Contractor shall demonstrate to the Government that their primary Website, Military OneSource online solution has the capacity to service a large scale organization with a Client population of about 6 million individuals.

4.2. 1.5 The website provides downloadable content and must include the capability for user personalization.

4.2. 1.6 Military OneSource Website and e-mail services shall have 98% online and e-mail availability and shall have the capacity to grow expeditiously to meet increasing demands for service.

4.2.1.7 The contractor shall develop an interface that integrates its existing EAP service into the MOS open source code website. The technical information provided in Attachment F: the interface document, design documents, functional specifications, APIs, listing of third party relationships, the core features, import/export processes, administration features, content management core capabilities and specification sheet for hardware and platform information.

4.2.1.8 The Contractor shall provide a Military OneSource Website based on the state of the art, open source technology consistent with the core functional design elements provided. The Website 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 families. The Website shall also have Voice Over Internet Protocol (VOIP) capability.

4.2.1.9 The Military OneSource Website shall provide locators for multiple programs, to include but not limited to, 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.

4.2.1.10 The Contractor shall provide the Web content in English and Spanish as well as a process for responding to e-mails in English and Spanish.

4.2.1.11 The website will have a secure login capability as a user option. The Government requires access, but not ownership to the vendor's EAP program. Accordingly, it is a requirement for the website to interface with the vendor's existing EAP structure. The Government shall maintain ownership of all data and content in front of the login, and all of the data behind the login contained within the vendor's case management system.

4.2.1.12 The contractor's website must fully comply with Section 508 of the Workforce Investment Act of 1998.

4.3 MINIMUM REQUIREMENTS APPLICABLE TO BOTH MOS CALL CENTER AND WEBSITE

4.3.1 The Contractor shall provide access to telephone and Internet services that meet the standards of Section 508, U.S. Rehabilitation Act.

4.3.2 The Contractor shall provide security to protect the confidentiality, integrity, and availability of data in accordance with all applicable Federal Laws, regulations, policies, and industry standards 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.

4.3.3 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. An average of 12-15 ITUs are anticipated annually.

4.3.3.1 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.

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

4.3.3.1.2 The Contractor shall provide a draft version of the specified ITU NLT 20 days, via the internet or CD/DVD, as appropriate and designated by the Government.

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

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

4.3.4 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 all 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.

4.3.5 The contractor's technical infrastructure and telecommunication capabilities support 24 x 7 call center operations to receive both CONUS and OCONUS calls.

4.3.6 The contractor's technical infrastructure integrates the case management system with Call Center operations and website operations.

4.3.7 The contractor's technical infrastructure integrates the call center data/analytics into reporting requirements.

4.4 CASE MANAGEMENT SYSTEM

4.4.1 CASE MANAGEMENT OBJECTIVE. The Government desires 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 case management system shall be capable of maintaining Client confidentiality/privacy 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 will support DoD reporting requirements.

4.4.2 CASE MANAGEMENT SYSTEM MINIMUM REQUIREMENTS

4.4.2.1 The Contractor shall identify and describe 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.

4.4.2.2 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 close-out information to the 1-800/Website vendor for input into the case management system. Close out information shall be sufficient to document services provided without violating client confidentiality.

4.4.2.3 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.

4.4.2.4 The contractor's case management system is compliant with the Privacy Act.

4.4.2.5 The contractor's case management system assures confidentiality while eliminating the need to repeat information on subsequent calls.

4.4.2.6 The case management system tracks duty to warn cases.

4.4.2.7 The contractor's case management system tracks emergent, urgent, and routine issues.

4.4.2.8 The contractor's case management system is ODBC Compliant.

4.4.2.9 The case management system provides for web-enabled and access-leveled security.

4.4.2.10 The contractor's case management system provides a scheduler functionality to support follow-up tracking and the provision of additional services.

4.5 REPORTING

4.5.1 MONTHLY REPORTS OBJECTIVE. The Government requires detailed monthly Military OneSource data and analysis of program utilization for use in program development. 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 identification of best practices and targeted marketing.

4.5.2 MINIMUM REQUIREMENTS FOR MONTHLY REPORTS. The Contractor shall deliver a Monthly Progress Status Report and a Financial Disbursement Report. Submission shall be due monthly beginning on the 15th of the month following contract award and on the 15th of each month thereafter throughout the period of performance.

4.5.2.1 The 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.

4.5.2.2 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 available as both Microsoft and Excel products.

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

4.5.2.4 Submissions of reports shall be in Windows XP (Word or Excel) format and sent via e-mail.

4.5.2.5 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>.

4.5.2.6 Required Data in Report – The Monthly Progress Report shall include, but will not be limited to (also reference Section J attachment):

4.5.2.6.1 Program Report

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

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

4.5.2.6.1.3 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.

4.5. 2.6.1.4 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.

4.5. 2.6.1.5 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:

4.5. 2.6.1.5.1 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.

4.5. 2.6.1.5.2 Non-medical counseling to include number referred, number sessions, type (individual, group, face-to-face, telephonic, e-mail)

4.5. 2.6.1.5.3 Child Care Referrals

4.5. 2.6.1.5.4 Call Center Statistics (including sub-sets of Spouse Education and Counseling

4.5. 2.6.1.5.5 Call Center and Wounded Warrior Call Center

4.5. 2.6.1.5.6 Client Call Back Statistics

4.5. 2.6.1.5.7 Web Site Utilization Statistics (including number of unique visitors, length of time on site, areas visited, etc.)

4.5. 2.6.1.5.8 Counseling statistics (number referred, number receiving counseling)

4.5. 2.6.1.5.9 Contractor will submit on the 15th of each month the attached report, to which other requirements may be added by the Government.

4.5. 2.6.2 Financial Disbursement Report

4.5. 2.6.2.1 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/Sub-CLIN.

4.5. 2.6.2.2 Cumulative hours expended throughout the reporting period by job category

4.5. 2. 6.2.3 Staffing Status Report by Business Activity for which vendor is billing the Department Services to include activated on-call or on-demand activities.

4.6 DISASTER RECOVERY

4.6.1 DISASTER RECOVERY OBJECTIVE. The Government requires that client MOS services be available 24/7 despite any natural or man-made disasters that might befall an MOS Call Center or the MOS website operations. In the event of a disaster, the Military OneSource telephone number and website will serve as the primary information source for Clients. Contractor shall demonstrate capability for disaster recovery capabilities and redundancy for all Military OneSource operations and systems (1-800 Call Centers, Websites and Case Management System) to ensure continuity of services.

4.6.2 MINIMUM REQUIREMENTS FOR DISASTER RECOVERY. 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.

4.6.2.1 Contractor shall develop and implement procedures to address organizational policy for system recovery.

4.6.2.2 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.

4.6.2.3 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.

4.6.2.4 The contractor's technical processes and procedures provide for disaster recovery for the Military OneSource websites.

4.6.2.5 The contractor's disaster recovery procedures provide no down time and no loss of data.

4.7 GENERAL EDUCATION/ INFORMATION MATERIALS

4.7.1 EDUCATION / INFORMATION MATERIALS OBJECTIVE. MOS education and information materials provide Clients with in-depth information and resources that support Client management of the challenges of military and family life.

4.7.2 MINIMUM REQUIREMENTS FOR EDUCATION/INFORMATION MATERIALS. Contractor shall have the capability to 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.

4.7.3 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.

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

4.7.5 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.

4.7.6 Contractor shall provide educational and informational materials normally provided as part of the 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.

4.7.7 Revised Attachment A provides the current inventory of Government Furnished Information. The contractor shall develop additional materials throughout performance of this requirement.

4.8 MILITARY UNIQUE REQUIREMENTS

4.8.1 The Contractor shall establish protocols and procedures for client usage of the call center and website. 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 established to connect interested Clients to the various injured support programs as required.

4.8.2 The Contractor must establish and maintain a customer-service atmosphere of respect and concern for every Service member or family member, regardless of grade, ethnicity, education, sophistication or problem.

4.8.3 The Contractor shall develop and conduct initial and ongoing training for call center staff to familiarize them 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.

4.8.4 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. Clients must be able to easily link to any of the Military Branches information, in support of their duty assignment.

4.8.5 The design of the Military OneSource Website must reflect a military theme, be user-friendly and attractive to the young military population.

4.8.6 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.

4.8.7 The Contractor shall provide a direct link from the Military OneSource website to the military installation websites and/or shall provide military installation information via the call center when installation website access is unavailable.

4.8.8 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.

TASK 2 NON-MEDICAL COUNSELING

5.0 NON-MEDICAL COUNSELING OBJECTIVES. The DoD goal for non-medical counseling services is to provide Service members and their families with 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 with a professional. Types of counseling provided will include, but not limited to, individual, family and couples, marital, group, educational, career and financial. Non-medical counseling provides service members and their families a full range of private, confidential, non-medical counseling services by providing referrals for face-to-face, on-line or other innovative solutions, and/or telephonic counseling to address current and emerging needs. Face-to-face Counseling sessions are limited to six sessions per presenting issue. Non-medical counseling is comprised of the following four main types:

1. Situational and Problem Solving counseling
2. Financial counseling
3. Educational, career and employment counseling
4. Health and wellness

Generally, non-medical counseling supports service members and their families as it:

- makes expert short term, non-medical counseling services available to troops and their families on demand
- helps troops and families cope with normal reactions to abnormal/adverse situations.
- assesses and delivers 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
- 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.

Specifically, objectives within problem solving counseling include:

- 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.

Specifically, objectives within financial counseling include:

- providing 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, reducing household expenditures, avoiding 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.

Specifically, objectives within education, career counseling include:

- offering information and guidance on financial, education and career matters.

Non-medical counseling services include, but are not limited to, the following services:

<u>Situational/Problem Solving Counseling</u>	<u>Financial Counseling</u>	<u>Educational, Career, Employment Counseling</u>	<u>Health and Wellness</u>
+ Well-Being	+ Money Management	+ School-Work/Grades	+ Fitness & Exercise
+ Deployment Stress	+ Financial Stability	+ Spouse Career Goals	+ Diet/Eating Habits
+ Marital / Couples Issues	+ Banking	+ Spouse Education Goals	+ Health
+ Family Relationships and Concerns	+ Credit Management	+ Personalized assessment/analysis of skills and interests	+ Goal setting
+ Homesickness	+ Budget Counseling	+ Provide information on occupations and salaries	+ Life coaching
+ Making Friends	+ Money Management	+ Assess training and education interests	+ Outreach and engagement
+ Serious Illness in Family	+ Debt Liquidation	+ Career exploration	+ Life Health Assessment
+ Parenting	+ Financial Record Keeping	+ Assist with resume writing	+ Non-monetary incentives
+ 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**

5.1 MINIMUM REQUIREMENTS FOR ALL TYPES OF NON-MEDICAL COUNSELING

5.1.1 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 for telephonic or face-to-face counseling.

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

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

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

5.1.5 The Contractor shall provide access to a National Network that provides non-medical counseling available to Clients.

5.1.5.1 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.

5.1.5.2 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.

5.1.5.3 The Contractor shall capture selective Client 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.

5.1.6 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.

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

5.1.8 The Contractor shall maintain procedures for recruiting, training, retaining and managing a network of non-medical counselors for Military OneSource clients. The Contractor shall describe qualifications, experience, and credentialing requirements for counselors.

5.1.9 The contractor shall maintain a training program and methodology to ensure providers are unbiased to military service, understand military culture, the issues facing Servicemen/Servicewomen and their dependents.

5.1.10 The contractor shall establish and maintain processes and procedures to provide services within 30 minutes or 15 miles of Client's location.

5.1.11 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.

5.1.11.1 All counselors must be licensed or certified and be compliant 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 their families.
- 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.

5.2 MINIMUM REQUIREMENTS FOR PROBLEM SOLVING COUNSELING ONLY

5.2.1 Problem Solving Counseling. 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.

5.2.2 The Contractor shall provide access 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. The Contractor's National Network shall assure access to face-to-face counseling for Clients.

5.3 MINIMUM REQUIREMENTS FOR FINANCIAL COUNSELING ONLY

5.3.1 Financial Management Counseling. Financial management counselors shall maintain a national certification with the National Foundation for Credit Counseling. 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.

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

5.3.3 Financial counselors shall provide service delivery that meets the standards in DODI 1342.7, and assist Service members and their families with personal financial readiness. Regular reviews of Activity Reports and quality assurance review of financial services shall indicate that all financial counselors are practicing within the authorized scope of care.

5.4 MINIMUM REQUIREMENTS FOR SPOUSE EDUCATION AND CAREER COUNSELING

Contractor will establish a call center dedicated to education, career and employment counseling services for military spouses world-wide. The Government's minimum requirement for Spouse Education and Employment Services is that the Call Center be affiliated with an education/training institution accredited by the US Department of Education.

5.5 MINIMUM REQUIREMENTS FOR HEALTH AND WELLNESS COUNSELING ONLY

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 non-monetary incentives to assist Service members and families attain and maintain their health and wellness goals.

5.6 MILITARY UNIQUE REQUIREMENTS FOR NON-MEDICAL COUNSELING

5.6.1 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.

5.6.2 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.

5.6.3 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.

5.6.4 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 via the Military OneSource service.

5.6.5 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.

5.6.6 **TAX FILING SERVICES OBJECTIVE.** The Government is making available the ability for Clients to obtain tax consultation services and to file their federal and state tax forms on-line via the Military OneSource website.

5.7 MINIMUM REQUIREMENTS FOR MOS TAX FILING SERVICES. Contactor shall provide tax filing support that allows Service members access to free tax filing services for Federal and multiple state returns via the MOS website. Military OneSource Clients will be able to link directly to the tax filing service.

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

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

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

5.7.4 Contractor shall establish quality control procedures for tax service support specific to the Military population unique tax issues.

5.7.5 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.

5.7.6 Training for all counseling staff shall include ongoing familiarization with issues relevant to members of the military community.

5.7.7 Contractor shall encourage Clients to maximize the use of tax refunds, i.e., savings.

5.8 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 (within 15 miles or <30 minutes drive) 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.

B. MISSION SUPPORT TASKS

TASK 3 MILITARY ONESOURCE PROGRAM SUPPORT CENTERS

6.0 MILITARY ONESOURCE PROGRAM SUPPORT CENTERS' OBJECTIVE: The Government's objective for each of the four program support centers are defined below:

6.1 WOUNDED WARRIOR RESOURCE CENTER (WWRC) OBJECTIVE:

6.1.1 The WWRC shall 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 life. 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. The WWRC 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.

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

6.1.3. MINIMUM REQUIREMENTS FOR WWRC CENTER

6.1.3.1 The WWRC must be contiguous with the Military OneSource operation and will work closely with the Military OneSource call center for routine and frequent information exchange to institute this directed response to Wounded Warriors and their families.

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

6.1.3.3 Contractor shall have a process for following DOD protocols to respond to all Wounded Warrior inquiries involving a report of deficiencies, which will be reported immediately to DoD officials, including the COTR, within 1 hour of receipt.

6.1.3.4 Contractor will provide monthly reports to the Government that include, but are not limited to, 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.

6.1.3.5 The contractor shall dedicate personnel to support the Wounded Warrior Resource Center.

6.1.3.6 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.

6.2 SPOUSE EDUCATION AND CAREER COUNSELING CALL CENTER OBJECTIVE. The Government's objective for the spouse education and career counseling call center is to have a call center dedicated to education, career and employment counseling services for military spouses world-wide to serve the approximately 700,000 spouses of active duty Service members, to assist spouses in learning about Military Spouse Career Advancement Account Program (MSCAAP) and provide information regarding eligibility, education and employment questions received via telephone and/or from the internet. The center shall also be a source of advice for 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. The center shall also serve spouses appropriately to the local community colleges and training institutions as appropriate and the local One-Stop Career Center.

6.2.1 MINIMUM REQUIREMENTS OF SPOUSE EDUCATION AND CAREER COUNSELING CALL CENTER. Call Center counselors will provide military spouses world-wide 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 for 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 placement in employment

6.2.2 The Spouse Education and Career Counseling Call Center must be affiliated with an accredited (by the U.S. Department of Education) training/educational institution.

6.2.3 Call Center Director must have a Master's Degree in Education/Guidance Counseling.

6.2.4 The Spouse Career Counselors must possess at minimum, a Bachelor's degree with at least 2 years experience in education and career counseling.

6.2.5 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.

6.2.6 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.

6.2.7 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.

6.2.8 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.

6.2.9 Contractor will provide spouses with information on the Military Spouse Career Advancement Account Program (MSCAAP) career education and training program. Call center staff will collaborate with the DoD program managers of the MSCAAP initiative in providing services to military spouses. 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

6.2.10 Contractor will assist students in developing career plans through work with education/training institutions throughout the United States, approve career plans, recommend sources of funding for courses, licenses and certifications.

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

6.2.12 Contractor will report monthly contacts and referrals by state, installation, educational institution and career field and other data points as identified by the Government.

6.2.13 Contractor will assist clients with job search.

6.2.14 The contractor shall assist spouses in completing their online CAA application.

6.2.15 The contractor shall maintain advising records/notes for each program participant via a secure intranet application that allows Call Center staff to enter and view notes related to spouse Call Center support.

6.3 JOINT FAMILY SUPPORT ASSISTANCE RESOURCE CENTER

6.3.1 JOINT FAMILY SUPPORT ASSISTANCE RESOURCE CENTER OBJECTIVE. The JFSAP supports members of the National Guard and Reserve Components by consolidating military, community, state and private organization resources and deliver information at the state level. These services consist of mobile support service for isolated units, sponsorship of volunteers and family support professionals.

6.3.2 MINIMUM REQUIREMENTS OF JOINT FAMILY SUPPORT ASSISTANCE RESOURCE CENTER.

6.3.2.1 Contractor shall provide Program Managers to service all states and territories 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.

6.3.2.2 Contractor shall provide a Director for the Joint Family Support Assistance for the Guard and Reserve Program. The contractor shall provide up to 50 center staff, which shall be co-located with the state, National Guard Joint Force Headquarters Command and the four territories.

6.3.2.3 The contractor shall coordinate activities with the active Military Services, National Guard and Reserves, helping organizations, community agencies and other military and civilian stakeholders.

6.4 MILITARY ONESOURCE CENTER

6.4.1 MILITARY ONESOURCE CENTER OBJECTIVE. The Military OneSource Center is designed to develop, identify, support and promulgate innovative improvements and best practices in quality of life services supporting military troops and families through the Military OneSource program. The environment in which military families live is complicated, complex and ever-changing and requires a dynamic support system. This center is a research and analysis facility, not a call center, and accordingly, does not provide direct services to Clients. The Government will provide MOS Center oversight and guidance.

6.4.2 MINIMUM REQUIREMENTS OF MILITARY ONESOURCE CENTER.

6.4.2.1 The MOS Center may require as many as 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, that provide support to troops and families with managing work-life balance and that identify and promulgate best practices. Particular expertise in child care, public-private ventures, post-secondary education and employment, financial management, communications, Wounded Warriors and support to Guard and Reserve components is required.

6.4.2.2 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, with a minimum qualification of a Bachelor's degree and relevant experience to their job function, 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.

6.4.2.3 The Center will be a physical, non-virtual center in the National Capital Region with access to public transportation in a facility that accommodates training capacity for approximately 50 staff daily.

6.5 ADDITIONAL CENTERS FOR EMERGING NEEDS. 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.

TASK 4 PROGRAM OVERSIGHT

7.0 PROGRAM OVERSIGHT OBJECTIVE. To establish a dedicated program management team of key personnel to assure the consistent delivery of high quality services to the Clients.

7.1 MINIMUM REQUIREMENTS FOR PROGRAM MANAGEMENT

7.1.1 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.

7.1.2 Contractor will provide an on-site Military Branch (Army, Navy, Air Force, and Marine Corps) Program Manager to each of the four Military Services headquarters to coordinate Service specific requirements.

7.1.3 The contractor shall develop and maintain a training program and methodology to ensure staff members will be current on military services specific issues and understand military terminology and the issues facing Service men and women and their dependents.

7.1.4 The contractor shall develop and maintain management processes, tools and technical expertise to integrate all elements of the Military OneSource requirements to support and maintain a system of counselors and care managers at a level of readiness over the contract's period of performance.

7.1.5 The contractor shall develop and maintain processes and procedures to support the warm hand-off of Clients to other providers and community resources.

7.1.6 The contractor shall develop and maintain management processes and procedures to provide services to Clients worldwide.

7.1.7 The contractor shall develop and maintain management processes to provide back up call center support.

7.1.8 The contractor shall develop and maintain established management processes and procedures to meet peak usage periods and manage spikes in call volume.

7.1.9 The contractor shall develop and maintain established processes and procedures for its obligations as it applies to "Duty to Warn" in the event a Client reveals a threat to self or others.

7.1.10 The contractor shall develop and maintain established processes and procedures for meeting the staffing requirements including hiring, training, and managing a staff of Masters level professionals.

7.1.11 The contractor shall develop and maintain management processes and procedures to ensure the website meets information and systems security requirements.

7.1.12 The contractor shall develop and maintain management processes and procedures to provide for disaster recovery for the Military OneSource websites.

7.1.13 The contractor shall develop and maintain management process to meet Section 508 of Workforce Investment Act of 1998 and all DOD security requirements as applicable.

7.1.14 The contractor shall develop and maintain processes and procedures to ensure a direct link from the MOS website to Military Installation websites and relevant community websites.

7.1.15 The contractor shall develop and maintain a process for regular updating and posting of Military and community quality of life information.

7.2 RELATIONSHIP MANAGEMENT

7.2.1 **RELATIONSHIP MANAGEMENT OBJECTIVE.** To connect both military and civilian leaders with the MOS program and identifying where customized support is needed to address local military leadership requirements.

7.2.2 Relationship Managers shall be assigned to cover all installations on a regional basis based on the size and geographic location of the installations.

7.2.3 Relationship managers are responsible for utilization and trend analysis at the Service and installation level and to work with a designated Military Service (Army, Navy, Air Force, Marine Corps) representative/point of contact to discuss strategies to increase Client awareness of MOS and installation MOS utilization.

7.2.4 Relationship Managers shall provide installations and communities with MOS briefings/orientations and conferences. The goal of these services will be to increase awareness and utilization of the program. 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 Federal Travel Regulation and pre-approved in writing by the COTR. The Government reserves the right to make changes to the scheduled visits based on the needs of the military.

7.3 MOS ADVERTISEMENT PLAN

7.3.1 **MOS ADVERTISEMENT PLAN OBJECTIVE.** The marketing and advertising plan will raise awareness and further brand Military OneSource for Service members and their families.

7.3.2 **MINIMUM REQUIREMENTS FOR MOS ADVERTISEMENT PLAN.** The Contractor shall assist DoD in developing and implementing an Advertisement Plan. The plan shall include a comprehensive multi-media advertising campaign that incorporates television, radio, the Internet, print media, military related publications and private organizations, mechanisms to communicate to the Guard and Reserve members, military trade or professional conferences, commissary, exchanges, DoD schools and other DoD activities. These costs must be approved in writing and in advance by the COTR.

7.3.2.1 The plan must be developed by a full-service marketing, advertising and public relations firm with advertising and marketing experience with the military. This shall be done using an outside vendor who is able to both further the Military OneSource brand as well as market other DoD programs through Military OneSource. The DoD retains approval authority for all components. The DoD will specify appropriate themes, to include, but not limited to the following:

JAN-APRIL – Financial Readiness, Taxes, Prevention of Identity Theft.

MAY-JULY – Relocation/Moving, Military Family Month (May), Summer Recreation Activities, Military Recreation Opportunities.

AUG-SEPT – School and Education, Child Care, Spouse Education and Employment

OCT-DEC – Holidays, Healthy Habits, Health and Wellness, Stress Reduction

7.3.2.2 As a subsidiary of the advertising plan, contractor will have responsibility for implementing the advertising strategies, development and distribution of collateral marketing materials. The plan will include promotion/marketing collateral material (i.e., wallet cards, magnets), electronic newsletters, and word of mouth marketing techniques. DoD will retain approval authority for content and distribution plan. Contractor must submit a monthly plan for distribution of collateral materials for conferences, meetings, etc. The plan will include monthly and quarterly marketing themes.

7.4 QUALITY ASSURANCE

7.4.1 QUALITY ASSURANCE OBJECTIVE. To ensure Military OneSource Clients receive the highest quality services possible.

7.4.2 MINIMUM REQUIREMENTS FOR QUALITY ASSURANCE. The Contractor shall establish quality control procedures for all Military OneSource operations. This plan will be in contractor format.

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

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

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

7.4.2.4 The Contractor will identify a Quality Control support team that will ensure delivery of performance of non-medical counseling services.

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

7.5 MILITARY ONESOURCE PROGRAM TRANSITION

7.5.1 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 120 days after contract award.

7.5.1.1 Contractor will design an interface to connect their existing EAP services with the MOS website.

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

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

7.5.2.2 Call center will respond to 100 percent of incoming calls at 120 days after contract award.

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

7.5.2.4 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.

7.5.3 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.

7.5.3.1 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.

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

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

7.5.4 Government Furnished Information. The Government will provide protocols, the wounded warrior case tracking system, all of the information contained within revised Attachment A at the beginning of transition.

7.5.5 Transition Reporting Requirements – Every two weeks, the contractor shall provide a report, in contractor format, detailing the status of implementation milestones for call center, website, reports, disaster recovery, general education/materials, all non-medical counseling, all MOS centers, and all program oversight elements to include status of sub-contracts. A face to face update meeting will take place monthly at the CO's location in Herndon, Virginia.