

Department of Veterans Affairs (VA) Office of Small and Disadvantaged Business Utilization Strategic Outreach and Communications (SOC), Education and Training Support Services

1. Introduction. [The Office of Small Disadvantaged Business Utilization (OSDBU) provides numerous services for Veteran-Owned Small Businesses (VOSB) and Service-Disabled Veteran-Owned Small Businesses (SDVOSB) that seek to open or expand a business. The VetBiz VOSB Verification Program verifies Veteran status and examines ownership and control records to validate businesses' eligibility to participate in the Department of Veterans Affairs (VA) unique buying authority established by Public Law (PL) 109-461, Sections 502 and 503 and PL 111-275 Section 104. The Direct Access Program provides networking opportunities to Veteran business owners and the Strategic Outreach and Communications Program provides information used to educate Veteran business owners on obtaining Procurement Readiness. VA is seeking contracted support services to help collect information, process and analyze data, and promulgate information in support of all OSDBU programs. Programs and strategies to expand Small Business (SB) participation in Federal procurement opportunities through aggressive SOC research, analysis, outreach, education, training, program modernization, and IT enhancements in order to enable the Department to meet its socioeconomic goals]

1.1 Applicable Documents:

- PL 109-461;
- PL 111-275;
- 38 CFR Part 74;
- OSDBU Standard Operating Procedures (SOP)
- Templates for research and review sheets
- Operational Memorandums
- [P.L. 108-136 \(Sec. 1428 NDAA 2004\)](#)
- [FAR 7.108.](#)

2. Scope or Purpose. [Provide a summary of the scope or purpose of the requirement]

The Contractor shall provide administrative and professional support to the SOC sub directorate, Education and Training mission area. The contractor shall furnish all necessary personnel, facilities, supplies, equipment, training and oversight to provide

outreach and communication, education and training materials, program, and project management in support of the following OSDBU directorates and functions:

- a. All outreach and training phases of the Verification Program, the Direct Access Program, The Strategic Outreach and Communications and training Program, and the Acquisition Support Program, OSDBU Operations and Executive Action cell.

The scope of work may fluctuate based on public law, and/or variation in the needs of the OSDBU to meet mission goals.

Contractor personnel shall have access to proprietary information and, in some instances, may have access to Veterans' Personally Identifiable Information (PII); therefore, personnel supporting SOC must have Moderate Risk Level or higher security investigations. The work shall be performed at the contractor's facilities, with the exception of tasks designated for performance at Government sites.

3. Period of Performance. [Insert start and end dates. Specify option periods, if included. Option periods may not begin after the final ordering date of the IDIQ base contract.]

The period of performance (PoP) for the base period is 12-months from contract award date with four 12-month option periods.

Period	Estimated Dates
Base	TBD
Option One	TBD
Option Two	TBD
Option Three	TBD
Option Four	TBD

4. Place of Performance. [Contractor's facility or Government facility. If Government, provide address and any other specific information.]

The primary place of performance shall be at the contractor's location with the exception of those designated to work at the following Government locations:

- 801 I Street NW, Washington, DC 20410;
- 90 K St. NE, Washington, DC 20002;
- other designated Government sites within the Washington, DC metropolitan area.

No work shall be performed outside of a 50-mile radius of Washington, DC. All contractors must be available for a monthly on-site training day and regular duty at the government facilities listed above as required by the Federal team lead. Contractor staff working at contractor sites shall comply with the connectivity requirements in order to promote communications, coordination, and management effectiveness.

All contractor staff must be available for a monthly on-site training day and regular duty at the government facilities listed above as required by the Federal team lead through the Contracting Officer Representative (COR). Contractor staff may be eligible for telework IAW P.L. (REFERENCE FROM LIST ABOVE). The contractor is responsible for coordinating sufficient support to provide services and coverage throughout the core work hours. Hours of Operation are defined as Monday through Friday, 7:30 a.m.–5:30 p.m. No work shall commence on Federal Holidays. There may be a need for alternative work schedules with no contractor working more than 40 hours per week.

No work shall be done, transmitted to, or accessed from outside the United States

5. Travel.

Travel within a 50 mile radius of VA Central Office (VACO) and the contractor's facility is considered "local travel" and will not be reimbursed. Contractor shall perform travel outside the local travel radius required to complete the requirements of this PWS as authorized. Travel will be reimbursed in accordance with Federal Travel Regulations and approved in advance by the COR. Contractor shall provide receipts for all travel expenses. In order to be reimbursed for travel, contractor invoices shall comply with FAR 31.205-46. The Government will reimburse contractor for all appropriate costs associated with official travel. Contractors performing official travel shall file their standard contract expense report (with receipts) upon completion of the travel. The cost of local travel, meal, and/or incidental expenses cost will not be reimbursed for Contractor performance. Travel costs will be included in the order award as a separate, cost-reimbursable, "not to exceed" contract line item.

6.0 Task statement.

6.1 Task 1 – Program Management

The contractor shall not commence performance on the tasks in this PWS, other than those required for the kick off meeting until the Contracting Officer (CO), Contracting Officers Representative (COR) and the contractor participate in post award kick-off meeting held by the Government. The kick-off meeting shall occur within seven (7) business days after contract award and the location is to be determined.

The contractor shall develop and maintain a Quality Control Plan (QCP) to ensure contractor oversight is performed in accordance with (IAW) the PWS and performance standards. The plan shall include a comprehensive Quality Assurance Surveillance Plan (QASP) IAW the performance requirement in Attachment E. The contractor shall

develop and implement procedures to identify, prevent, and ensure non-recurrence of defective services. The contractor's quality control program shall be the means by which the contractor assures work complies with the requirements of the contract. All QCP inspection results shall be shared with the CO and COR. The QCP shall be submitted at the kick-off meeting and shall include at a minimum the following:

- Who will be responsible for conducting QCP inspections;
- What will be inspected, when, and how;
- How inspection results will be documented and tracked; and
- How discrepancies will be resolved?

The contractor shall provide Monthly Status Reports (MSRs). The MSRs shall provide a summary of activities conducted in support of the PWS. The report shall cover the month-end, status of deliverables, accomplishments, planned activity for the next month, and any issues and resolutions and any risk mitigation strategies the contractor deems appropriate for the Government to consider.

Within five (5) business days after the kick-off meeting, the contractor shall submit a detailed draft Project Work Plan (PWP) and briefing for the VA project team, which presents the contractor's plan for completing the contract. The contractor's plan shall provide a detailed approach to be used for each aspect of the tasks defined in the PWS. The PWP shall include, at a minimum, the following:

- Summary level process for the execution and closeout phases of the project, to address all stages necessary to develop and complete deliverables;
- Major milestones - detailed process for identifying, analyzing and approving changes to approved schedules, documents, requirements, deliverables and resources;
- Project management and quality control;
- Status updates;
- Risk management and mitigation strategies;
- Closeout Management Plan - process for ensuring that the COR formally accepts and closes out the following:
 - All project tasks have been completed and all deliverables have been completed and delivered to the COR;
 - Lessons learned, and feedback from participants, etc., have been documented, reviewed and turned into the COR.

Within 3 business days after this draft PWP briefing, the contractor shall submit the final detailed draft Project Work Plan (PWP) and briefing for the VA project team, which presents the contractor's plan for completing the contract

The contractor shall have all required positions fully staffed prior to the beginning of the period of performance.

6.1.1 Project Manager Tasks (Education and Training Team Lead)

- Manage small-scale project encompassing multiple tasks with a total lifecycle and complexity comparable to the task order at hand
- Lead, direct and guide the completion of work that is performed for Training and Education Outreach
- Complete assignments consisting of numerous steps that vary in nature and sequence.
- Select alternative methods and solutions for problems not solvable by adapting or interpreting substantive guides, manuals, or procedures.
- Assist in a variety of administrative matters;
 - Maintain a wide variety of financial or other records.
 - Verify statistical reports for accuracy and completeness.
 - Handle and adjust and resolve complaints
 - Process complex transactions
 - Devise steps necessary to complete assignments.
 - Collect and maintain work activity data and documentation (i.e., survey data, time, and activities).
- Develop user guides, training materials and other performance reports
- Analyze collected data to develop training strategies
- Respond to routine and non-routine inquiries
- Establish and maintain confidential files and records.
- Conduct research and analyses
- Prepare training and education communications to vendors and procurement partners, while supporting vendor outreach activities

Task 1 Deliverables:

- 6.1.a Kick-off Meeting
- 6.1.b Quality Control Plan
- 6.1.c Monthly Status Reports
- 6.1.d Project Work Plan

6.2 Task 2 – Strategic Outreach and Communications (Education and Training Support)

The contractor shall perform for SOC discrete services and provide deliverables in support of the SOC Education and Training as requested, to include and as outlined below, IAW SOC SOP and the detailed Tasks, Conditions, and Standards for Deliverables in Attachment E.

6.2.1 Strategic Outreach and Communications (SOC) - Promotes SB awareness of opportunities, access to procurement decision makers, and procurement readiness of small businesses through communications, events, educational activities, research, and analysis.

6.2.1.1 Education and Training (General Task) - The contractor shall develop and implement Education and Training campaigns to support major SOC programs and activities, and in response to issues confronting SOC. Education and Training shall include:

- Provide research and analysis to support development of Education and Training in support of SOC missions and activities;
- Provide Education and Training Plans that support intent and objectives of major SOC programs and activities;
- Provide Education and Training response plans in response to issues that SOC confronts;
- Implement a multi-dimensional Education and Training approach targeted to specific audiences.

The Education and Training Plan with messages and materials: shall be clear, concise, and provide guidance on Education and Training actions that include material and other deliverables that support the goals of SOC programs and are consistent with VA policy and procedures. All documentation shall be delivered in hard copy and electronic format using Microsoft Office or other products approved by a SOC Project Manager.

Deliverable:

6.2.1.1 Education and Training Plan

6.2.1.2 Communications (Customer Service) – The contractor shall support a responsive customer service communications program. The customer service program shall include:

- Develop system to respond to stakeholder inquiries and communications; and
- Manage SOC/Verification Email boxes, generate Email responses or refer Emails to the appropriate team if the Email is not a SOC/Verification issue;

Activity Reports: shall be clear and concise, deliverables reviewed and approved by the SOC Project Manager for accuracy and consistency.

Answering phone calls: shall provide daily coverage for each customer service activity.

Deliverables:

6.2.1.2.a Customer Service Activity Report

6.2.1.2.b Stakeholder inquiry Report

6.2.1.3 Education (General Task) - The contractor shall support education and training of small businesses. The contractor shall develop and implement

Education and Training campaigns to support major SOC programs and activities, and in response to issues confronting SOC.

The material to support education shall include:

- Provide Education and Training Material;
- Evaluate existing information and educational material on becoming procurement ready and how to do business with VA. Examine material from other agencies for best practices;
- Develop education material on how to access and use information resources such as Forecast Contracting Opportunities; and
- Conduct survey of VOSBs to determine how useful they find the material;
- Arrange venues to conduct training at the contractor's expense;
- Conduct training using various mediums to include Microsoft Lync, Microsoft Live Meeting, and other government approved software;
- Use metrics and data gleaned from productivity reports to recommend training to reverse and eliminate negative trends productivity as they occur, or further improve positive trends;
- Conduct training which aligns with the organization's long and short term operational goals; and
- Maintain a list of all training conducted to include participation roster.

Education and Training Materials: shall be clear, concise and VOSB rated as helpful or very helpful. All training material shall be in both hard copy and electronic formats.

Deliverables:

6.2.1.3 Education & Training Material

6.2.1.4 Education (Feedback & Metrics) - The contractor shall develop mechanisms to generate and assess Feedback and Metrics. The mechanisms shall include:

- Develop and conduct quantitative and/or qualitative research to measure the effectiveness, efficiency and return on investment of different SOC initiatives, programs and events to include the following: measure the ease of use, accuracy, and efficiency of each set of education and training material; and
- Develop and conduct surveys to measure the effectiveness, efficiency and return on investment of the following areas:
 - Initial Verification Determination,
 - Direct Access Program (DAP) events,
 - Evaluation of verification counselors,
 - Veterans Entrepreneur Portal (VEP),
 - OSDBU Help Desk/Customer Service,
 - How to do Business with VA workshop,
 - Procurement Ready webinars,
 - Pre-Application workshops,

- National Veteran Small Business Engagement (NVSBE)
- Speaking engagements,
- Procurement Decision Makers (PDMs),
- PDM (after DAP events);
- And other areas as defined by the federal lead.

Reports and Surveys: Shall follow ANNEX E format requirements.

Raw Assessment Data: shall be provided in Microsoft Excel format, and assessment reports to include narrative, graphics, and comparative and statistical analysis as appropriate.

Deliverables:

6.2.1.4.a Research Reports

6.2.1.4.b Surveys

6.2.1.5 Procurement Readiness & Partnerships (General Task) - The contractor shall develop a plan to support the Procurement Readiness Program.

The procurement readiness and partnerships support shall include:

- Update “Cycle of Success” support documents as needed;
- Develop procurement readiness training material;
- Identify procurement readiness programs that exist in federal, state, local governments and the commercial sector, and gather data on their effectiveness;
- Develop a VOSB Procurement Readiness Online Self-Assessment Tool; and
- Enhance Veteran Entrepreneur Portal (VEP) to include all identified programs;

Documents and Materials: Shall include a capacity building and partnership plan for stakeholders. Shall be clear, concise, error free and in electronic and hardcopy formats.

Deliverables:

6.2.1.5.a Cycle of Success Support Documents

6.2.1.5.b Procurement Readiness Training Material

6.2.1.5.c VOSB Procurement Readiness Online Self-Assessment Tool

6.2.1.6 Procurement Readiness & Partnerships (Procurement) - The contractor shall promote awareness of procurement readiness programs. The procurement support shall include:

- Promote the use and benefits of the Veterans Entrepreneur Portal;
- Advertise to the targeted small business community the benefits of becoming procurement ready;
- Develop and use multi-faceted marketing approach;

- Develop materials and tools outlining the advantages of being a “Verified” business to the small business community;
- Develop education and resource material outlining the advantages of being procurement ready; and
- Distribute procurement ready material to SOC partners and to SBs participating in OSDBU events.

Documents, Reports, and Templates: shall be a clear, compelling documents promoting procurement readiness. Documentation shall be both in electronic and hardcopy formats.

Deliverables:

6.2.1.6.a Documents

6.2.1.6.b Reports

6.2.1.6.c Templates

6.2.1.7 Procurement Readiness & Partnerships (Support Management) - The contractor shall support management of procurement readiness.

Support management shall include:

- Track all procurement readiness activities and partnerships;
- Provide reports on progress of activities; and
- Generate certificates for event participants

Procurement Readiness and Partnerships Support documents: shall be clear, concise and error free. Activity report shall include date, time, attendance, socio-economic categories, type of events, and PDMs name and title.

Deliverables:

6.2.1.7.a Activity Progress Report

6.2.1.7.b Participant Certificates

6.2.1.8 Procurement Readiness & Partnerships (Customer Service) - The contractor shall support procurement readiness and partnerships.

Customer service shall include:

- Adjudicate Capacity Building/Partnerships Mailbox;
- Answer and respond to phone calls and Emails related to small business questions and concerns; and
- Research the small business community’s questions and concerns on outreach activities and programs and provide a report on the results.

Reports: shall be a clear, concise, and error free. Documentation shall be both in electronic and hardcopy formats.

Deliverables:

6.2.1.8 Outreach Questions/Concerns Report

6.2.2 Provide substantive verification training for all CVE personnel (federal staff and contractors) to include but not limited to new staff, functional areas, refresher, and external training, and conduct . Biweekly and Director Training,(See Biweekly and Director Training Work Instruction)

- 6.2.2.1 The contractor shall perform training support for all Verification personnel, including: As the verification program evolves, submit substantive updates to the Defense Logistics Agency for incorporation into the online Verification Program training
- Verification Process Training (See Verification Process Training Work Instruction)
- Maintain the training program to the extent is maintains its ISO 9001 certification.
- Maintain a list of all training conducted to include a participation roster;
- Conduct bi-weekly Verification Program training consisting of substantive material which contributes to sustaining the verification program expertise of attendees
- Create and sustain a process wherein training recommendations from Verification portfolio Team Leaders are incorporated into the Verification Program bi-weekly training schedule.
- Create and publish a quarterly training schedule of verification program topics. Proctor these training sessions.
- Create and sustain the process wherein all new CVE personnel (staff and contractors supporting the Verification Program) are attend the Verification Program Training no later than 5-days after reporting onboard. Host quarterly substantive verification program training for the CVE Certified Verification Assistance Counselors.
- Sustain conducting the following Verification Program webinars: Pre-Application Brief; Renewal; How to Stay Verified
- attend Verification CCB meetings to get first-hand training requirements resulting from the Board's actions and conduct associated training as required and within the timeline prescribed by the CCB process;
- Develop a standardized "Training Flash" memorandum to distribute process/operating changes approved by the Director CVE to all Verification Program personnel to include: Certified Verification Counselors, Site Visit (SV) Examiners, and OSDBU Customer Service/Call Center; Joint Application Examiners;
- Develop, maintain, and update a Verification Baseline Training syllabus including the overall Verification Program/Process.
- Develop, maintain, and update subject specific syllabi for each verification portfolio;
- Create a Training Report describing upcoming training events

and analysis supporting the recommended training;
Utilize information gleaned from the various Veteran-facing verification and OSDBU touch points to develop substantive verification program training intended to reduce application processing errors by applicants and CVE Staff, and increase Veteran knowledge the verification program.

- Ensure all verification personnel are trained and certified within 90 days of hire;
- Provide updated training material to Verification Assistance Counselors; and
- Provide certificates for all training participants.

Education and Training Material: Shall be comprehensive education and training material which synchronizes with the information in the comprehension tests. Update as required.

Training Program Report: The report shall incorporate the analysis gleaned from the verification program portfolio metrics of errors made by the personnel, and recurring questions received from Veterans, and surveys.

Deliverables:

- 6.2.2.1.a List of all Training
- 6.2.2.1.b Attendance Roster
- 6.2.2.1.c Training Flash memorandum
- 6.2.2.1.d Education and Training Material
- 6.2.2.1.e Training Program Report
- 6.2.2.1.f Verification Baseline Training Syllabus
- 6.2.2.1.g Verification Subject Specific Syllabi
- 6.2.2.1.h Verification Assistance Counselor Coordination Report

6.2.2.2 Support Coordination of Verification Assistance Counselors. The contractor shall: (See Verification Support Liaison Work Instructions)

- Provide Content to Update Verification Assessment and Resource Tools;
- Provide Verification Assistance to counselors supporting the Vets First Program; and
- Conduct Counselor Verification Roundtables and training sessions.

Activity and After Action Report: The contractor shall coordinate and maintain open lines of communication with all Verification Assistance Counselors, to include assuring assessment tool information remains current with Verification operating procedures and Public Law updates to the Assessment Tools.

Deliverables:

- 6.2.2.2.a Activity Report

- 6.2.2.2.b After Action Report
- 6.2.2.2.c Conduct Roundtables
- 6.2.2.2.d Conduct Training Sessions

6.2.2.3 Support Outreach Events. The contractor shall perform support for OSDDBU outreach events, including: (See Outreach Work Instructions)

- Make recommendations regarding timing, opportunities, and logistics associated with Outreach Events;
- Perform on-site support as required during outreach events;
- Publish and distribute information to interested vendors on outreach events;
- Notify stakeholders of upcoming events via a medium approved by communications;
- Ensure CVE Certified Counselors are available for outreach events and presentation materials are available fourteen calendar days prior to the event;
- Make logistics recommendations including floor plans; and
- Develop content for outreach material

Deliverables:

6.2.2.3.a Recommendations related to Outreach Events Support

6.2.2.3.b On-site Support during Events

6.2.2.3.c Notify stakeholders of upcoming events

6.3 Task 3 – Clerical Support

6.3.1 Provide support to SOC Director/Deputy's by tracking actions, collecting, organizing, and reporting operational and management information to Director. The contractor shall:

- Provide advice and assistance to the Director and Deputy Directors to support the day-to-day actions, liaise with contract and federal leadership;
 - Project/initiate/solicit calendar input and post daily updates for Director;
 - Compile and submit daily personnel accountability report;
 - Schedule and set-up all required meetings and conferences/calls and prepare and distribute meeting minutes;
 - Utilize various technology mediums in support of meetings, presentation and reports;
 - Distribute mail;
 - Provide oversight and daily internal/external task monitoring and provide weekly status update; and
Coordinate off site event requests Meet and escort visitors.
- Gather information for the Director or Deputies to schedule meetings for approved requests.

- Perform research to gather, analyze and provide pertinent information to management.
- Prepare "Read Ahead" package for the Director in advance of each meeting.
- Track any requirements emanating from meetings to ensure appropriate follow up action is taken.
- Review and analyzes submissions resulting from taskers to determine whether the response meets the requirement and takes appropriate action to follow up.
- Assist in planning, coordinating and supervising implementation of a variety of outreach and training events, internal and external to the agency.
- Perform the tracking of all actions, review and evaluate submissions received to ensure that appropriate follow up action is taken.
- Develop and oversee implementation of all of the administrative/logistical support for outreach events and training.
- Perform scheduling, travel arrangements, itinerary, and coordination of events for Director and Deputies.
- Prepare drafts of correspondence for use in communicating after event.
- Demonstrate the ability to communicate effectively orally and in writing along with skill in developing and maintaining effective interpersonal relationships.

Deliverables:

- 6.3.1.a Director's Calendar including meeting schedules and details
- 6.3.1.b Personnel Accountability Report
- 6.3.1.c Weekly Task Report
- 6.3.1.d Dashboard Report and associated presentations
- 6.3.1.e Travel/Meeting Read-Ahead Material and Actions
- 6.3.1.f Produce and Distribute Meeting minutes
- 6.3.1.g Recommend Process Improvements
- 6.3.1.h Draft Correspondence
- 6.3.1. i. Event Request Documents

7.0 Delivery Schedule.

7.1 Deliverables or Report Requirements

The contractor shall submit reports in the formats and to the specifications established in OSDBU SOPs. For reports not established in OSDBU SOPs, the contractor shall develop and submit a proposed format for all reports and obtain approval from the COR prior to submission of the first report. All contractor provided work products are to be furnished within the specified delivery dates established by OSDBU SOPs as noted in Attachment E or as outlined below in section 11.3 - Deliverable Schedule. Any changes to delivery dates shall be discussed with the COR and requested in writing to the CO. If for any reason any deliverable cannot be delivered within the scheduled time frame, the contractor is required to explain why in writing to the CO including a firm commitment of

when the work shall be completed. This notice to the CO shall cite the reasons for the delay, modified delivery date, impact on the overall project, and revised project plan with all adjusted dates. The CO shall then review the facts and issue a response approving or disapproving the request. The contractor shall establish and maintain a quality assurance program to ensure that all tasks and deliverables are completed IAW the PWS.

7.2 Government Acceptance

The COR will have the right to reject or require correction of any deficiencies found in the deliverables that are contrary to requirements established in Attachment E. In the event of a rejected deliverable, the contractor shall be notified in writing by the COR of the specific reasons for rejection. The contractor shall correct the rejected deliverable IAW Attachment E or within five (5) business days for the reports listed in Section 11.3 and return it per delivery instructions or submit a suitable remediation plan including a firm commitment of when the rejected deliverable will be corrected.

7.3 Schedule of Deliverables

Schedule of Deliverables (CAD = Contract Award Date, Days = Business Days)
All deliverables are electronic unless otherwise noted.

Task	Paragraph	Item Description	Quantity	Delivery Date
16.3	Security/Contractor Responsibilities	VA Contractor Background Investigation Worksheet	TBD	Immediately after CAD
16.9	Training	Training certificates	TBD	1 week after CAD
16.5	Confidentiality and Nondisclosure	Non-Disclosure Agreement	TBD	1 week after CAD
6.1 Task 1	Project Management	Kick-Off Meeting	1	7 days after CAD
		Quality Control Plan	1	At Kick-Off Meeting
		Monthly Status Reports	12	Base and Option Periods: 5 th business day of the following month
		Project Work Plan	1	Base: Within 5 days from Kick-Off Meeting Option Period: Update PWP within 5 days exercised option period

Task	Paragraph	Item Description	Quantity	Delivery Date
6.2.1.1	Strategic Outreach and Communications (SOC) Education and Training	Education and Training Plan	Monthly	Within 30 days from Kick-Off Meeting
6.2.1.3	Communications Support Management	Research Report	Monthly	TBD
6.2.1.3	Communications Support Management	Analytical Report	Monthly	TBD
6.2.1.4	Communications Customer Service	Customer Service Activity Report	Biweekly	TBD
6.2.1.4	Communications Customer Service	Stakeholder Inquiry Report	Biweekly	TBD
6.2.1.5	Education	Education and Training Campaigns	As required	TBD
6.2.1.5	Education	<ul style="list-style-type: none"> • Training Sessions List • Attendance Roster 	Monthly	TBD
6.2.1.5	Education	Education and Training Material	As required	TBD
6.2.1.6	Education Feedback and Metrics	<ul style="list-style-type: none"> • Research Reports • Surveys 	As required	TBD
6.2.1.7	Procurement Readiness and Partnerships	<ul style="list-style-type: none"> • Cycle of Success Support Documents • Procurement Readiness Training Material 	As required	TBD
6.2.1.7	Procurement Readiness and Partnerships	VOSB Procurement Readiness Online Self-Assessment Tool	As required	TBD
6.2.1.8	Procurement Readiness and Partnerships – Procurement	<ul style="list-style-type: none"> • Documents • Reports • Templates 	As required	TBD
6.2.1.9	Procurement Readiness and Partnerships – Support Management	<ul style="list-style-type: none"> • Activity Progress Reports • Participant Certificates 	As required	TBD

Task	Paragraph	Item Description	Quantity	Delivery Date
6.2.1.10	Procurement Readiness and Partnerships – Customer Service	Outreach Questions/Concerns Report	Monthly	TBD
6.2.2.1	Verification Education and Training	<ul style="list-style-type: none"> • Training Sessions List • Attendance Roster 	Monthly	TBD
6.2.2.1	Verification Education and Training	Training Flash Memorandum	As required	Within 30 days from Kick-Off Meeting
6.2.2.1	Verification Education and Training	<ul style="list-style-type: none"> • Education and Training Material • Participant Certificates 	As required	TBD
6.2.2.1	Verification Education and Training	Training Program Report	Monthly	TBD
6.2.2.1	Verification Education and Training	Verification Baseline Training Syllabus	Update as required	Within 30 days from Kick-Off Meeting
6.2.2.1	Verification Education and Training	Verification Subject Specific Syllabi	As required	TBD
6.2.2.1	Verification Education and Training	Verification Assistance Counselor Coordination	As required	TBD
6.2.2.2	Support Coordination of Verification Assistance Counselors	Activity Report	Monthly	TBD
6.2.2.2	Support Coordination of Verification Assistance Counselors	After Action Report	As required	TBD
6.2.2.2	Support Coordination of Verification Assistance Counselors	<ul style="list-style-type: none"> • Conduct Roundtables • Conduct Training Sessions 	As required	TBD

Task	Paragraph	Item Description	Quantity	Delivery Date
6.2.2.3	Support Verification Outreach Events	<ul style="list-style-type: none"> • Support Outreach Events Recommendations • On-site Support during Outreach Events • Upcoming Events Notification to Stakeholders 	As required	TBD
6.3.1	Admin Support	<ul style="list-style-type: none"> • Director's Calendar including Meeting Schedules and Details • Personnel Accountability Report • Mail Distribution 	Daily	TBD
6.3.1	Admin Support	Task Report	Weekly	TBD
6.3.1	Admin Support	<ul style="list-style-type: none"> • Dashboard Report and Associated Presentations • Travel/Meeting Read-Ahead Material and Actions • Produce and Distribute Meeting Minutes • Recommend Process Improvements • Draft correspondence • Event Request Documents 	As required	TBD

8.0. Government-Furnished Information, Equipment, and Facilities.

8.1. Government Furnished Information:

The Government will provide all applicable SOPs and any information necessary for performance under this PWS.

8.2 Government Furnished Equipment (GFE)

The Government will provide work space, telephone service, and GFE necessary (i.e. (2) each monitors, (1) each keyboard, (1) each CPU, access to printing, scanning, and

copying) for contractor personnel working at the Government locations. Issuance of government equipment to contractor personnel working off site will be at the discretion of the government Contracting Officer's Representative (COR) in coordination with the contract Program Manager. Due to space constraints, the government site cannot accommodate all contractors

The contractor shall provide telephone service and equipment necessary to perform work similar in specifications and efficiency to what all contractors working at Government sites require. Citrix is available for contractor laptops allowing offsite access to the VA network. Contractor employees shall have video teleconferencing (VTC) capabilities and accessibility to telephone and email.

Citrix Access Gateway (CAG) is the recommended remote access solution for OE users. This is the most secure method for the VA to provide access to OE devices. CAG is a method of providing access to applications within the VA trusted network without having to install the application on the OE. The OE device is never actually on the VA trusted network. CAG requires the installation of a thin client on the end user's device. CAG offers support for stationary and mobile devices. There are numerous supported operating systems to include Windows, MAC OSX, iOS and Linux. CAG presents users with applications with a desktop look. CAG can also provide a virtual desktop. Virtual desktops are a simulation of a PC setting inside of the VA trusted network. Support for copy and paste or printing is available with sufficient business justification made to the user's ISO. These features are disabled by default until explicitly requested and keeps VA data from being easily captured outside of the VA.

System Requirements:

The CAG provides support for the following systems:

- Operating Systems
 - Windows XP, Vista, 7 and 8;
 - Windows Server 2003, 2003 R2, 2008, and 2008 R2;
- Browser Support
 - Internet Explorer (IE) 6 – 10;
 - Safari ○ Firefox Mozilla ○ Google Chrome

Hardware Requirements:

- VGA or SVGA video adapter with color monitor;
- Windows-compatible sound card for sound support (optional);
- For network connections to the server farm, a network interface card (NIC) and the appropriate network transport software;
- At least 256 MB of RAM;
- 15 MB of free disk space; and
- 2-button mouse with the right button to be the secondary button highly recommend.

PIV card readers

Web camera capability.

To utilize the Citrix Online Plug-in for Macintosh v11.4.3:

Supported Macintosh Operating Systems:

- Mac OS X Version 10.6 Snow Leopard (Intel only) 32-bit and 64-bit with Safari 5.x or Firefox 3.x-5.x browsers; and
- Mac OS X Version 10.7 Lion (Intel only) 32-bit and 64-bit with Safari 5.x or Firefox 3.x-5.x browsers.

9.0 Key Personnel

Certain skilled, experienced professional, and/or technical qualifications are essential for accomplishing the work to be performed. Individuals having these qualifications are defined as “Key Personnel” and are those persons whose experience biographies shall be submitted and marked by the contractor as “Key Personnel” through submission of the Technical Approach/Management Plan Factor. Substitutions shall only be accepted if in compliance with the “Substitution of Key Personnel” provision identified below.

The following personnel are considered key personnel by the Government:

1. Program Manager;
2. Project Manager
3. Instructional System Designer (Senior)

10.0 Task Order Quality Assurance Surveillance Plan (QASP).

Contractor performance shall be monitored and measured using a QASP, see Attachment F. The method of surveillance will be the OSDBU Management Information System, the VEM, or other management information system established by OSDBU which will monitor the work flow of all actions processed by the contractor and random inspection. The contractor may utilize additional software at no cost to the Government that will allow for reporting and tracking purposes. Metrics reports shall be collected by OSDBU IAW OSDBU SOPs (to include, daily, weekly, monthly, quarterly, and annually). Metrics outlined in Attachment E shall apply to each all contractor actions.

11.0 General

Contractors, contractor personnel, subcontractors, and subcontractor personnel shall be subject to the same Federal laws, regulations, standards, and VA Directives and Handbooks as VA and VA personnel regarding information and information system security.

12.0 Access to VA Information and VA Information Systems

a. A contractor/sub-contractor shall request logical (technical) or physical access to VA information and VA information systems for their employees, subcontractors, and

affiliates only to the extent necessary to perform the services specified in the contract, agreement, or task order.

b. All contractors, subcontractors, and third-party servicers and associates working with VA information are subject to the same investigative requirements as those of VA appointees or employees who have access to the same types of information. The level and process of background security investigations for contractors must be in accordance with VA Directive and Handbook 0710, Personnel Suitability and Security Program. The Office for Operations, Security and Preparedness is responsible for these policies and procedures.

c. Contract personnel who require access to national security programs must have a valid security clearance. National Industrial Security Program (NISP) was established by Executive Order 12829 to ensure that cleared U.S. defense industry contract personnel safeguard the classified information in their possession while performing work on contracts, programs, bids, or research and development efforts. The Department of Veterans Affairs does not have a Memorandum of Agreement with Defense Security Service (DSS). Verification of a Security Clearance must be processed through the Special Security Officer located in the Planning and National Security Service within the Office of Operations, Security, and Preparedness.

d. Custom software development and outsourced operations must be located in the U.S. to the maximum extent practical. If such services are proposed to be performed abroad and are not disallowed by other VA policy or mandates, the contractor/subcontractor must state where all non-U.S. services are provided and detail a security plan, deemed to be acceptable by VA, specifically to address mitigation of the resulting problems of communication, control, data protection, and so forth. Location within the U.S. may be an evaluation factor.

e. The contractor or subcontractor must notify the Contracting Officer immediately when an employee working on a VA system or with access to VA information is reassigned or leaves the contractor or subcontractor's employ. The Contracting Officer must also be notified immediately by the contractor or subcontractor prior to an unfriendly termination.

13.0 Security Incident Investigation

a. The term "security incident" means an event that has, or could have, resulted in unauthorized access to, loss or damage to VA assets, or sensitive information, or an action that breaches VA security procedures. The contractor/subcontractor shall immediately notify the COTR and simultaneously, the designated ISO and Privacy Officer for the contract of any known or suspected security/privacy incidents, or any unauthorized disclosure of sensitive information, including that contained in system(s) to which the contractor/subcontractor has access.

b. To the extent known by the contractor/subcontractor, the contractor/subcontractor's notice to VA shall identify the information involved, the circumstances surrounding the incident (including to whom, how, when, and where the VA information or assets were placed at risk or compromised), and any other information that the contractor/subcontractor considers relevant.

c. With respect to unsecured protected health information, the business associate is deemed to have discovered a data breach when the business associate knew or should have known of a breach of such information. Upon discovery, the business associate must notify the covered entity of the breach. Notifications need to be made in accordance with the executed business associate agreement.

d. In instances of theft or break-in or other criminal activity, the contractor/subcontractor must concurrently report the incident to the appropriate law enforcement entity (or entities) of jurisdiction, including the VA OIG and Security and Law Enforcement. The contractor, its employees, and its subcontractors and their employees shall cooperate with VA and any law enforcement authority responsible for the investigation and prosecution of any possible criminal law violation(s) associated with any incident. The contractor/subcontractor shall cooperate with VA in any civil litigation to recover VA information, obtain monetary or other compensation from a third party for damages arising from any incident, or obtain injunctive relief against any third party arising from, or related to, the incident.

14.0 Liquidated Damages For Data Breach

a. Consistent with the requirements of 38 U.S.C. §5725, a contract may require access to sensitive personal information. If so, the contractor is liable to VA for liquidated damages in the event of a data breach or privacy incident involving any SPI the contractor/subcontractor processes or maintains under this contract.

b. The contractor/subcontractor shall provide notice to VA of a “security incident” as set forth in the Security Incident Investigation section above. Upon such notification, VA must secure from a non-Department entity or the VA Office of Inspector General an independent risk analysis of the data breach to determine the level of risk associated with the data breach for the potential misuse of any sensitive personal information involved in the data breach. The term 'data breach' means the loss, theft, or other unauthorized access, or any access other than that incidental to the scope of employment, to data containing sensitive personal information, in electronic or printed form, that results in the potential compromise of the confidentiality or integrity of the data. Contractor shall fully cooperate with the entity performing the risk analysis. Failure to cooperate may be deemed a material breach and grounds for contract termination.

c. Each risk analysis shall address all relevant information concerning the data breach, including the following:

- (1) Nature of the event (loss, theft, unauthorized access);
- (2) Description of the event, including:
 - (a) Date of occurrence;
 - (b) data elements involved, including any PII, such as full name, social security number, date of birth, home address, account number, disability code;
- (3) Number of individuals affected or potentially affected;
- (4) Names of individuals or groups affected or potentially affected;

- (5) Ease of logical data access to the lost, stolen or improperly accessed data in light of the degree of protection for the data, e.g., unencrypted, plain text;
- (6) Amount of time the data has been out of VA control;
- (7) The likelihood that the sensitive personal information will or has been compromised (made accessible to and usable by unauthorized persons);
- (8) Known misuses of data containing sensitive personal information, if any;
- (9) Assessment of the potential harm to the affected individuals;
- (10) Data breach analysis as outlined in 6500.2 Handbook, Management of Security and Privacy Incidents, as appropriate; and
- (11) Whether credit protection services may assist record subjects in avoiding or mitigating the results of identity theft based on the sensitive personal information that may have been compromised.

d. Based on the determinations of the independent risk analysis, the contractor shall be responsible for paying to the VA liquidated damages in the amount of \$_____ per affected individual to cover the cost of providing credit protection services to affected individuals consisting of the following:

- (1) Notification;
- (2) One year of credit monitoring services consisting of automatic daily monitoring of at least 3 relevant credit bureau reports;
- (3) Data breach analysis;
- (4) Fraud resolution services, including writing dispute letters, initiating fraud alerts and credit freezes, to assist affected individuals to bring matters to resolution;
- (5) One year of identity theft insurance with \$20,000.00 coverage at \$0 deductible; and
- (6) Necessary legal expenses the subjects may incur to repair falsified or damaged credit records, histories, or financial affairs.

15. TRAINING

a. All contractor employees and subcontractor employees requiring access to VA information and VA information systems shall complete the following before being granted access to VA information and its systems:

- (1) Sign and acknowledge (either manually or electronically) understanding of and responsibilities for compliance with the Contractor Rules of Behavior, Appendix E relating to access to VA information and information systems;
- (2) Successfully complete the VA Cyber Security Awareness and Rules of Behavior training and annually complete required security training;
- (3) Successfully complete the appropriate VA privacy training and annually complete required privacy training; and
- (4) Successfully complete any additional cyber security or privacy training, as required for VA personnel with equivalent information system access [to be defined by the VA program official and provided to the contracting officer for inclusion in the solicitation document – e.g., any role-based information security

training required in accordance with NIST Special Publication 800-16, Information Technology Security Training Requirements.

- b. The contractor shall provide to the contracting officer and/or the COTR a copy of the training certificates and certification of signing the Contractor Rules of Behavior for each applicable employee within 1 week of the initiation of the contract and annually thereafter, as required.
- c. Failure to complete the mandatory annual training and sign the Rules of Behavior annually, within the timeframe required, is grounds for suspension or termination of all physical or electronic access privileges and removal from work on the contract until such time as the training and documents are complete.

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