

<b>SOLICITATION/CONTRACT/ORDER FOR COMMERCIAL ITEMS</b> <i>OFFEROR TO COMPLETE BLOCKS 12, 17, 23, 24, AND 30</i>				1. REQUISITION NUMBER SEE SCHEDULE		PAGE 1 OF 70	
2. CONTRACT NO. GS00Q14OADS434		3. AWARD/EFFECTIVE DATE 17-Apr-2023		4. ORDER NUMBER HQ003423F0106		5. SOLICITATION NUMBER HQ003423R0013	
7. FOR SOLICITATION INFORMATION CALL:		a. NAME JIMMIE J. TOLOUMU				b. TELEPHONE NUMBER (No Collect Calls) (b)(6)	
9. ISSUED BY WHS - ACQUISITION DIRECTORATE 4800 MARK CENTER DRIVE, SUITE 09F09 ALEXANDRIA VA 22350  TEL: FAX:		CODE HQ0034		10. THIS ACQUISITION IS <input checked="" type="checkbox"/> UNRESTRICTED OR <input checked="" type="checkbox"/> SET ASIDE: 100 % FOR:  <input checked="" type="checkbox"/> SMALL BUSINESS <input type="checkbox"/> WOMEN-OWNED SMALL BUSINESS (WOSB) ELIGIBLE UNDER THE WOMEN-OWNED SMALL BUSINESS PROGRAM  <input type="checkbox"/> HUBZONE SMALL BUSINESS <input type="checkbox"/> EDWOSB NAICS: 541715  <input type="checkbox"/> SERVICE-DISABLED VETERAN-OWNED SMALL BUSINESS <input type="checkbox"/> 8(A) SIZE STANDARD: 1,000			
11. DELIVERY FOR FOB DESTINATION UNLESS BLOCK IS MARKED <input type="checkbox"/> SEE SCHEDULE		12. DISCOUNT TERMS Net 30 Days		13a. THIS CONTRACT IS A RATED ORDER UNDER DPAS (15 CFR 700) <input type="checkbox"/>		13b. RATING	
						14. METHOD OF SOLICITATION <input type="checkbox"/> RFQ <input type="checkbox"/> IFB <input checked="" type="checkbox"/> RFP	
15. DELIVER TO OSD DEFENSE RESEARCH AND ENGINEERING (b)(6) 3030 DEFENSE PENTAGON, RM 3B938 WASHINGTON DC 20301-3030		CODE HQ0287		16. ADMINISTERED BY  <b>SEE ITEM 9</b>			
17a. CONTRACTOR/OFFEROR STRATEGIC ANALYSIS INC (b)(6) 4075 WILSON BLVD STE 200 ARLINGTON VA 22203-2141 TELEPHONE NO (b)(6)		CODE 44609  FACILITY CODE		18a. PAYMENT WILL BE MADE BY WHS FINANCIAL MANAGEMENT DIRECTORATE 1155 DEFENSE PENTAGON WASHINGTON DC 20301-1155			
<input type="checkbox"/> 17b. CHECK IF REMITTANCE IS DIFFERENT AND PUT SUCH ADDRESS IN OFFER		18b. SUBMIT INVOICES TO ADDRESS SHOWN IN BLOCK 18a. UNLESS BLOCK BELOW IS CHECKED <input checked="" type="checkbox"/> SEE ADDENDUM					
19. ITEM NO.	20. SCHEDULE OF SUPPLIES/ SERVICES			21. QUANTITY	22. UNIT	23. UNIT PRICE	24. AMOUNT
<b>SEE SCHEDULE</b>							
25. ACCOUNTING AND APPROPRIATION DATA  <b>See Schedule</b>						26. TOTAL AWARD AMOUNT (For Govt. Use Only)  <b>\$17,289,710.84</b>	
<input type="checkbox"/> 27a. SOLICITATION INCORPORATES BY REFERENCE FAR 52.212-1. 52.212-4. FAR 52.212-3. 52.212-5 ARE ATTACHED.    ADDENDA <input type="checkbox"/> ARE <input type="checkbox"/> ARE NOT ATTACHED <input type="checkbox"/> 27b. CONTRACT/PURCHASE ORDER INCORPORATES BY REFERENCE FAR 52.212-4. FAR 52.212-5 IS ATTACHED.    ADDENDA <input type="checkbox"/> ARE <input type="checkbox"/> ARE NOT ATTACHED							
<input checked="" type="checkbox"/> 28. CONTRACTOR IS REQUIRED TO SIGN THIS DOCUMENT AND RETURN 1 COPIES TO ISSUING OFFICE. CONTRACTOR AGREES TO FURNISH AND DELIVER ALL ITEMS SET FORTH OR OTHERWISE IDENTIFIED ABOVE AND ON ANY ADDITIONAL SHEETS SUBJECT TO THE TERMS AND CONDITIONS SPECIFIED.				<input type="checkbox"/> 29. AWARD OF CONTRACT: REF. OFFER DATED . YOUR OFFER ON SOLICITATION (BLOCK 5), INCLUDING ANY ADDITIONS OR CHANGES WHICH ARE SET FORTH HEREIN, IS ACCEPTED AS TO ITEMS:			
30a. SIGNATURE OF OFFEROR/CONTRACTOR				31a. UNITED STATES OF AMERICA (SIGNATURE OF CONTRACTING OFFICER)  (b)(6)			
30b. NAME AND TITLE OF SIGNER (TYPE OR PRINT)		30c. DATE SIGNED		31b. NAME OF CONTRACTING OFFICER (TYPE OR PRINT) CHRISSANDRA SMITH / CONTRACTING OFFICER TEL: 571-289-6548 EMAIL: chrissandra.smith.civ@mail.mil		31c. DATE SIGNED 30-Mar-2023	

## **Performance Work Statement**

Office of the Undersecretary of Defense for Research and Engineering,  
Deputy Chief Technology Officer for Science and Technology  
Technical, Analytical, Financial, Administrative and Specialized Support (TAFASS)

### **1.0 DESCRIPTION OF SERVICES/GENERAL INFORMATION**

#### **1.1 Mission and Background**

The Office of the Under Secretary of Defense for Research and Engineering (OUSD(R&E)), Deputy Chief Technology Officer for Science and Technology (DCTO(S&T)) oversees and advocates for the Department of Defense (DoD) Science and technology (S&T) Enterprise. The DCTO(S&T) fosters innovation, unparalleled technical expertise, and technological dominance for the Department of Defense through leading-edge Science & Technology (S&T) research programs, stewardship of laboratories and research institutions, development of a superior S&T workforce, engagement with other government agencies, industry and academia, and cooperation with international allies and partners.

DCTO(S&T) postures the broader Research and Development (R&D) Enterprise that includes the Department's Federally Funded Research and Development Centers (FFRDCs), University Affiliated Research Centers (UARC), small businesses engaged in research, and the academic community to create far-reaching technology innovations and set them on a trajectory to create U.S. military technical advantage by reaching the following objectives:

- A DoD S&T Enterprise recognized globally for technical excellence and thought leadership.
- A balanced approach between maintaining scientific collaboration and protecting American scientific advances from illicit exploitation.
- Accelerated technology advancement by harnessing the full range of DoD's science and innovation base.

The DCTO(S&T) leads the Department's work to create DoD's technology advantage by:

- Overseeing the Department's entire Science and Technology portfolio.
- Advocating for the Department's S&T workforce and laboratory infrastructure.
- Overseeing the Department's Federally Funded Research and Development Centers (FFRDC) and University Affiliated Research Centers (UARC).
- Advocating for a robust basic research ecosystem across the DoD labs, centers, and academia.
- Helping to cultivate the next generation of S&T professionals for the Department.
- Advising on the Department's critical technology protection policy.
- Overseeing the health of the Defense technical industrial base.

The OUSD(R&E) is tasked with providing oversight and program management of science and technology (S&T) to solve current and future challenges for the Department of Defense (DoD). The OUSD(R&E) requires highly specialized technical, analytical, financial, administrative and specialized support for its DCTO(S&T) S&T Foundations and S&T Futures offices.

#### **1.2 Scope**

This Task Order (TO) provides technical, analytical, financial, administrative, specialized support services to assist the S&T Foundations and S&T Futures directorates within DCTO(S&T) organization in accomplishing its mission and objectives. This Performance Work Statement (PWS) documents the professional services required to support the OUSD(R&E) DCTO(S&T) organization. To meet these requirements, the Contractor shall provide the specialized knowledge and skill sets articulated in Section 5 to support programs under the S&T Foundations and S&T Futures offices. Work under this task order may also include support to other derivative offices of OUSD(R&E) that may result from reorganization.

The Contractor shall coordinate and collaborate with the Joint Staff, Services, Combatant Commands (CCMDs), other defense agencies, allies, academia, and industry as required. The Contractor shall be directly responsible for ensuring the accuracy, timeliness, and completion of all requirements under this PWS.

## 2.0 ACRONYM DEFINITIONS

AC	Advanced Computing
AI	Artificial Intelligence
AUKUS	Australia, the United Kingdom, and the United States
BBP	Better Buying Power
BRO	Basic Research Office
CAC	Common Access Card
CCMD	Combatant Commands
CFR	Code of Federal Regulations
CLIN	Contract Line Item Number
CNWDI	Critical Nuclear Weapon Design Information
CO	Contracting Officer
COI	Communities of Interest
CONUS	Continental United States (excludes Alaska and Hawaii)
COR	Contracting Officer's Representative
CPMP	Contractor Project Management Plan
CsUAS	Counter-Small Unmanned Aircraft Systems
CTC	Core Technical Competencies
DCID	Director of Central Intelligence Directive
DCTO(S&T)	Deputy Chief Technology Officer for Science and Technology
DD254	Department of Defense Form 254, Contract Security Requirement List
DFARS	Defense Federal Acquisition Regulation Supplement
DGARS	Defense Grant and Agreement Regulatory System
DHS	Department of Homeland Security
DoD	Department of Defense
DoDGAR	DoD Grant and Agreement Regulation
DTIC	Defense Technical Information Center
DTS	Defense Travel System
DUSD(I&E)	Deputy Under Secretary of Defense for Installations and Environment
EIT	Electronic and Information Technology
EO	Executive Orders
EXCOM	Executive Committee
FAA	Federal Aviation Administration
FAR	Federal Acquisition Regulation
FCG	Foreign Clearance Guide
FFRDC	Federally Funded Research and Development Centers
FLC	Federal Laboratory Consortium
FM	Financial Manager
FTE	Full Time Equivalent
GFP	Government Furnished Property
HBCU/MI	Historically Black Colleges and Universities/ Minority-Serving Institutions
IDIQ	Indefinite Delivery Indefinite Quantity
JTR	Joint Travel Regulation
M&MP	Materials and Manufacturing Processes
MILCON	Military Construction
NCR	National Capitol Region
NDA	Non-Disclosure Agreement
NISPOM	National Industrial Security Program
NIST	National Institute of Standards and Technology
NSF	National Science Foundation
NTE	Not-To-Exceed
OCI	Organizational Conflict of Interest
OCONUS	Outside Continental United States (includes Alaska and Hawaii)
ODC	Other Direct Costs

OMB	Office of Management and Budget
OSD	Office of the Secretary of Defense
OSTP	Office of Science and Technology Policy
OUSD(R&E)	Office of the Under Secretary of Defense for Research and Engineering
PFPA	Pentagon Force Protection Agency
PM	Program Manager
PMP	Privilege Management Program
POM	Program Objectives Memorandum
PPBE	Planning, Programming, Budgeting and Execution
PWS	Performance Work Statement
QASP	Quality Assurance Surveillance Plan
R&E	Research and Engineering
RD&A	Research, Development and Acquisition
RDT&E	Research, Development, Test, and Evaluation
S&T	Science and Technology
SAP	Special Access Programs
SAR	Special Access Required
SCI	Special Compartmental Information
STEM	Science, Technology, Engineering, and Mathematics
TIIB	Technology Industrial Innovation Base
TS	Top Secret
UARC	University Affiliated Research Centers
UAS	Unmanned Aircraft Systems
URED	Unified Research and Engineering Database

Note: Unless otherwise specified within this PWS, “days” shall mean business days.

### **3.0 GOVERNMENT FURNISHED ITEMS AND SERVICES**

#### **3.1 Services/Equipment**

The Government will provide facilities, equipment, and materials, as outlined in this TO, to complete this work effort. The Government will not provide a designated workstation for the Program Manager; however, space may be reserved as needed. The Government will provide Information Technology (IT) support to maintain government furnished IT equipment including laptops and smart phones, as applicable. All Government Furnished Property (GFP) will be furnished in as-is condition and physical inspection instructions may be provided by the provider of the GFP. All GFP will be processed by the COR. All inventory of the GFP will be maintained by the Joint Service Provider or COR. Details of the actual GFP will be provided at the time of the GFP processing. All Common Access Cards (CACs) will be issued on an as-needed basis, and are considered Government property that must be returned immediately upon expiration of the order or employee termination. Reference the Indefinite Delivery, Indefinite Quantity (IDIQ) contract Government Property clauses. At the request of the Government, or on completion of the TO, the Contractor will immediately return any property provided by the Government.

#### **3.2 Utilities**

The Government will provide all utilities in the Government facility to be available for the Contractor’s use in performance of tasks outlined in this PWS. The Contractor shall instruct personnel in utilities conservation practices.

#### **3.3 Facilities**

When the Government provides facilities as specified under Section 10.2, the Government will furnish the necessary workspace for the Contractor staff to provide the support outlined in this TO, to include desk space, telephones, computers, printers, and other items necessary to maintain an office environment. The Government will issue CAC cards on an as needed basis; however, CAC cards must be returned immediately when an employee departs or upon expiration of the TO. The Contractor will be allowed access to the Government's facilities, as specified in Section 6.

#### **3.4 Information**



Performance on this TO may require the Contractor to access and use material and information such as studies, reports, and key data considered proprietary to a Government agency or Contractor, which is of such a nature that its dissemination or use, other than in performance of this effort, would be adverse to the interests of the Government and/or others. If this is determined to be necessary, the Contractor will be required to sign a non-disclosure agreement (NDA) prior to commencement of the work. At the request of the Government, or on completion of the TO, the Contractor will immediately return any information provided by the Government.

#### **4.0 CONTRACTOR FURNISHED ITEMS**

##### **4.1 General**

The Contractor shall provide all equipment, supplies, facilities, transportation, tools, materials, and other items and non-personal services necessary to perform technical, analytical, financial, administrative, and specialized support as defined in this PWS except for those items specified in Section 3.

#### **5.0 PERFORMANCE REQUIREMENTS**

##### **5.1 Specific Task Areas**

The Contractor shall provide professional financial, administrative and specialized services to support DCTO(S&T's) S&T Foundations and S&T Futures offices. The tasks described below shall dictate the number, type, and essential skills for Contractor personnel. As directed, Contractor personnel shall be required to interact with senior leadership from the Office of the Secretary of Defense (OSD) and the Military Services. To accomplish the work in this PWS the Contractor shall provide a Program Manager (PM) (see Task 5.1.1 Program Management) who shall be responsible for the work performed under this TO. Service shall include professional technical and analytical experts with recent and relevant experience to support the OUSD(R&E)/DCTO(S&T) organization in the following task areas:

- Task 1: Program Management Support
- Task 2: DCTO(S&T) Front Office Support
- Task 3: S&T Foundations and Futures Front Office Support
- Task 4: Reliance 21 Roadmap
- Task 5: S&T Foundations Basic Research Office Support
- Task 6: DoD Laboratories Office Support
- Task 7: S&T Foundations DoD Labs Office FFRDC/UARC Support
- Task 8: Infrastructure Development Office
- Task 9: S&T Futures Directorate
- Task 10: Surge Support

To accomplish Tasks described in Section 5 below, the Contractor shall provide professional individuals with the appropriate skills to provide the required support for the DCTO(S&T) and its subordinate Offices. The Contractor shall provide technical, analytical, financial, administrative and specialized support teams to enable the overall S&T Foundations and S&T Futures' mission and accomplish the tasks described in Section 5.

##### **5.1.1. Task 1: Program Management Support**

The Contractor shall provide a PM to be the primary technical and managerial interface between the Contractor and the COR. The PM shall have the full authority to act for the Contractor on all TO matters relating to daily operations and/or Contractor assigned personnel. The Contractor shall:

- Provide management and oversight of all activities performed by contractor personnel, including subcontractors/teaming partners, to satisfy the requirements identified in this PWS.
- Provide management, direction, administration, quality assurance, and leadership of the execution of this contract.
- Provide a Contractor Project Management Plan within ten business days of award; updated annually.
- Maintain records and provide overall charges by office and by each individual for all costs associated with those efforts for the execution of this PWS.
- Meet and coordinate with the COR as necessary to maintain satisfactory performance and to resolve issues pertaining to Government-Contractor procedures. Written minutes of these meetings shall be

prepared by the Contractor and furnished to the Government within two (2) business days of the subject meeting.

- Provide monthly progress report that includes status of all performed tasks with submitted invoices. The Government will coordinate with the Contractor for format and timeline for submission of the monthly report.
- Plan, direct, and coordinate work activity for Contractor staff to ensure an efficient and effective workforce; and coordinate with the COR on TO and personnel matters.
- Contractor support shall possess experience developing, implementing, and executing effective plans for overall TO management and administration; and plan, direct, and coordinate the work activity of personnel involved in all aspects of the TO and to integrate problem resolution without loss of workforce efficiency.
- Coordinate travel and trip estimates for all contractors. This includes coordinating COR approval and validating that trip estimates are within travel funding levels.

### **5.1.2. Task 2: DCTO(S&T) Front Office Support**

#### **Subtask 2.1: Financial Management Support**

The contractor shall provide a Financial Manager (FM) to support financial and budget management of all DCTO(S&T) programs and financial analysts. The FM shall possess thorough knowledge of the DoD financial systems infrastructure and procedures throughout all phases of the DoD Planning, Programming, Budgeting, and Execution (PPBE) system. The FM shall support all phases of the PPBE process and meet all OSD mandated timelines for submission of PPBE related documents. The Contractor shall support all PPBE activities related to the execution of the DCTO (S&T) programs and other office support activities.

The Contractor shall:

- Assist in establishing and monitoring financial metrics to measure the value of DoD's program.
- Prepare analysis and evaluation of the effectiveness of programs and operations, and analyze financial and budgetary trends.
- Prepare documents and briefings for review and use of DoD senior leadership.
- Review statements of work and required funding documentation for accuracy of approved projects.
- Monitor DoD program execution, including submission of required documentation for release of funding, and follow up on distribution of funding, monitoring of obligation and disbursement rates for funded projects, and documentation of annual expenditures.
- Prepare and participate in Mid-Year reviews and other PPBE meetings.
- Assist in identifying baseline financial processes and designing target financial and business processes and procedures that, when implemented, can result in significant improvements in mission and cost effectiveness.
- Work with the information systems manager to identify financial systems and reports to improve budget formulation, execution and monitoring.
- Assist in developing the Program Objectives Memorandum (POM) and Budget Estimate Submission (BES) to include developing budget proposals, corresponding issue nominations and detailed budget justification material (R-Forms, P-Forms,).
- Assist in preparation of required documentation to support the DoD PPBE process, Research, Development, Test, and Evaluation (RDT&E) Descriptive Summary (R1-R4), Budget Issue Papers, and Support documentation for Program Decision Memorandum.

#### **Subtask 2.2: Financial Management/Budget Execution Support**

The Contractor shall:

- Assist in establishing and monitoring metrics to measure the value of DoD's program.
- Assist in preparation and review of program funding requests (Statements of Work), Funding Plans, Sub-allocation letters, unfunded requirement justifications, execution status reports, and other budget/financial documentation.
- Prepare analysis and evaluation of the effectiveness of programs and operations, and analyze financial and budgetary trends, to include preparing for budgetary and programmatic documents and briefings for review and use of DoD senior leadership.



- Monitor DoD program execution, including submission of required documentation for release of funding, and follow up on distribution of funding, monitoring of obligation and disbursement rates for funded projects, and documentation of annual expenditures.
- Prepare and participate in Tri-annual reviews, Mid-Year reviews, End-of-Year reviews, and other PPBE meetings.
- Prepare input for and analyze reports from electronic systems to include: DTIC R2 (Comptroller Budget Exhibit) system and others.
- Assist in identifying baseline financial processes and designing target financial and business processes and procedures that, when implemented, can result in significant improvements in mission and cost effectiveness.
- Work with the information systems manager to identify financial systems and reports to improve budget formulation, execution and monitoring.
- Assist in preparation of required documentation and analysis to support the DoD PPBE process, to include Research and Development Descriptive Summary, Budget Issue Papers, and Support documentation for Program Decision Memorandum.
- Assist in preparation of the President's Budget and POM/BES, to include developing/changing budget proposals and corresponding issue nominations and detailed budget justification material (R-Forms, P-Forms).

### **Subtask 2.3: Specialized Support – Technology/Web**

The Contractor shall provide graphics, multimedia, and/or web support for the DCTO(S&T). The Government encourages maximum use of OSD graphics and Defense Logistics Agency (DLA) services. If these services are unable to be met through OSD or DLA, the Contractor shall coordinate with the COR for an alternative. The Contractor shall:

- Draft and update content, develop and refine site design and structure concepts, develop html files with supporting graphics and JavaScript code, ensure compliance with DoD regulations (see <https://dodcio.defense.gov/DoD-Web-Policy/>) and Section 508 of the Rehabilitation Act and coordinate the upload of the files to the websites for the DCTO(S&T).
- Develop, update, and maintain a variety of visual aids, including text and illustrations, for highly technical programs/concepts.
- Produce 2-D and 3-D illustrations from scanned and edited photographs, images, drawings, and charts, to include quickly and efficiently producing high-quality (color, and black & white) viewgraphs, papers, and files in acceptable media formats.
- Produce posters and videos of industrial trade show and conference quality according to the parameters and guidelines (to include timeframes) as requested by the DCTO(S&T).

\*Any multimedia/graphics works first created, generated, or produced and required to be delivered under this task order shall be subject to DFARS 252.227-7020 Special Works.

### **Subtask 2.4: Technical Integration Support**

Technical Integration has ten (10) major program areas: 1). Nuclear Command, Control, and Communication Program (NC3); 2). Cyber Research and Technology Program; 3). Communications and Networks Program (C&N); 4). Autonomy, Artificial Intelligence (AI); and Advanced Computing (AC) Program; 5). Software and Embedded Systems Program; 6). Positioning Navigation and Timing Program (PNT); 7). Command and Control (C2) and Data analytics Program; 8). Sensors Program; 9). Electronic Warfare and Countermeasures Program (EW&C); and 10). Spectrum Initiatives and Analysis Program. The Contractor shall:

- Assist in development and review/inputs to strategy documents, research plans, and roadmaps for assigned technical program area.
- Support and attend designated program reviews of DoD and non-DoD Services/Agencies Communities of Interest and programs, to include Federally Funded Research and Development Centers (FFRDCs) and University Affiliated Research Centers (UARCs). Facilitate or lead deep dive, cross-organizational teams into high-interest or game changing technology areas.
- Assist in review and revisions of; execution of Congressional Special Interest Items, Congressional Reports, GAO studies, drafting policy guidance and responses, coordinating budget, and management oversight.

- Provide administrative support and coordination of technical program with DoD/Interagency policy such as the Networking and Information Technology Research and Development (NITRD) Program including its Subcommittee (SC) and Interagency Working Groups (IWGs) activities and tasks, Office of Science and Technology Policy working groups, National Science and Technology Council (NSTC) including its Subcommittees and/or Select Committees, and Federal Initiatives.
- Provide support to international programs; US-UK Stocktake and other bilateral international project agreements, The Technical Cooperation Panel (TTCP) and Subgroups, the US-Canada Continental Surveillance S&T Oversight Group, AUKUS cooperative programs, and the North Atlantic Treaty Organization Research and Technology Organization (NATO RTO), to include preparation of Terms of Reference (ToR), Data/Information Exchange Agreements, and other program related documents.
- Develop budget/financial documents, such as Funding Plans, Sub-allocation letters, and standard operating procedures.
- Provide assistance to the DoD Components in complying with OUSD(R&E) data calls and requirements. Interacts with other Service/Component contracting offices to facilitate open issues in contracting, technology, and budgeting, to include approval of work plans and public release documents.
- Assist in preparing for meetings and workshops, to include coordination of calendars of senior DoD personnel; preparation of announcements, agendas, read-ahead documents, meeting minutes, and technical briefing materials; management of logistics, travel arrangements, foreign visit requests, and meeting-facility support; and preparation and administration of action items.
- Assist in development and review of information papers and reports, such as weekly reports, information papers, action memoranda, emails, and other documents.
- Maintain broad situational awareness of research and development efforts involving the Technical Integration program areas.
- Provide analysis to the directorate leadership in areas such as Congressional Special Interest Items, Combatant Command engagements, research funding of DoD Labs, Small Business Innovation Research (SBIR), OSD and Services S&T initiatives, Federal S&T policy, Combatant Command engagements.
- Assist in financial management support of the Directorate, to include development of unfinanced requirement issue papers, whitepapers, proposals, and Terms of References (TORs); preparation and review of RDT&E Budget Item Justification and Planning, Programming, Budgeting and Execution (PPBE) documents; analysis of PPBE data and information; Quarterly Progress Reviews, and monitor year-end close out actions.
- Provide technical assessments and programmatic assistance, from concept definition through initial capability demonstrations.
- Provide technical and operational analysis for EW&C, linking emerging EW and other advanced technologies and concepts to joint operational capabilities.
- Prepare research and technical analyses to align assessments of new and emerging threats to state of the art technologies that have potential to defeat those threats.
- Provide analyses for EW&C to maintain awareness of commercial as well as government products to include new EW, sensor and other advanced technology developments.
- Provide analyses on technologies and community trends to identify key scientific developments and researchers/organizations and develop forecast of topics and trends.
- Conduct technology intelligence and research on topics of interest for countries of interest.

### **5.1.3. Task 3: S&T Foundations and Futures Front Office Support**

#### **Subtask 3.1. Business and Operations Management**

The Contractor shall:

- Maintain configuration and quality control of assignments at all times to assist with tasks.
- Develop decision-quality materials for scheduled and unscheduled in-process review meetings and briefings.
- Develop briefs and talking points for use by the DCTO(S&T) leadership with internal and external audiences, ranging in sizes from a few individuals to hundreds.



- Develop solutions and provide written materials, often in response to short-notice tasks assigned to the DCTO(S&T).
- Coordinate and review official correspondence and presentation materials for completeness and accuracy.
- Develop key communication points and messaging in support of the DCTO(S&T) media interaction. Review communication material for content, completeness, and accuracy.
- Provide direction to successfully aggregate, review and verify draft component inputs for congressional testimony and responses to questions for the record.
- Organize, develop and direct support for senior leadership activities to include agenda development, issue paper preparation, results documentation, and post-meeting actions.
- Review program plans and other related documents and provide comments to identify and mitigate risks to the accomplishment of the DCTO(S&T) projects and goals. Track progress and suggest alternate approaches for projects behind schedule.
- Provide recommendations for improvement of effectiveness and efficiency of the DCTO(S&T) business processes.
- Provide support to activities, meetings and projects to include, development of meeting agenda, management plans, and execution strategies; research and analysis of data; draft and review content (info papers, action memos, white papers and presentations); and accomplish coordination across required DoD offices.
- Assist with the execution strategy of initiatives in support of the Department's S&T activities. Identify and coordinate with participating government organizations and agencies (e.g., Defense Pricing and Contracting (DPC), Defense Contract Management Agency (DCMA), and Defense Technical Information Center (DTIC)). Develop objectives, format, and functionality: identify and meet with key users within the Department to determine requirements and the most effective end-user interface formats; develop outreach strategy to incentivize industry and users to foster participation; and provide status updates and metrics to support discussion with senior leaders.
- Prepare for review official presentations (in the appropriate format including Microsoft (MS) PowerPoint and/or MS Word), official information and action memos, concept papers for new projects, official responses to public correspondence; and articles for posting to the DCTO(S&T) website. The memos and other documents shall follow the standard established for the office and shall be appropriate for senior level government officials.
- Assist in tracking congressional marks and language through a congressional analysis and resource product.
- Provide research, technical and analytical support by identifying, retrieving, evaluating, and sharing relevant legislative information.
- Assist in the development and coordination of appropriate responses and reports to congressional inquiries and legal requirements pertaining to the DoD Research and Engineering projects.
- Coordinate updates to DoD Directives among DoD offices. Coordinate with DoD offices to resolve comments that lead to the successful publication of a new Directive.
- Prepare official program documents and correspondences based on the DCTO(S&T) input and direction and maintain accountability of associated program files and records.
- Perform research, information and reference gathering on assigned topics using government data sources and open sources (web).
- Provide editorial support to review draft documents prepared by the DCTO(S&T) offices for spelling accuracy, grammar correctness, logic flow, completeness, and compliance with DoD document preparation instructions.
- Provide support to ensure effective office operations (e.g., answer phones, deliver/receive administrative packages from other government offices packages).
- Monitor progress of initiatives to ensure progress occurs within cost and schedule parameters provided by the Government.
- Identify obstacles to implementation of the initiatives and recommend solutions.
- Conceive, construct and disseminate implementation status reports and program metrics to support discussion with senior leaders.

- Provide analysis and technical and programmatic support to the DoD S&T Reliance 21 planning organizations and the Communities of Interest (COI). Efforts to include:
- Prepare PowerPoint presentations, spreadsheets, and other documents for use in facilitating meetings.
- Provide administrative and graphics support in the development of Reliance 21 and COI documentation. Graphics to include tables, graphs, pictures, drawings and other graphics forms.
- Assist the Executive Secretary in the conduct of DoD S&T leadership committee meetings and other Executive Secretary actions. Efforts include meeting room preparation and setup, copying and collating meeting materials, and documenting and publishing meeting minutes and other records.
  - Track the status of actions required under the Reliance 21 and COI processes.
  - Attend meetings of the DoD S&T leadership committee.
  - Specific Meeting Support Tasks that shall be accomplished by the Contractor:
  - Develop and prepare the overall program presentation materials and provide administrative assistance during presentations which includes: graphics, audio-visual equipment, obtaining meeting supplies, and obtaining other documentation required by the DoD S&T leadership committee.
  - Identify and/or coordinate conference spaces to support Reliance 21 and COI activities with-in DoD facilities. All conference rooms shall have the capability for computer projected presentations and be equipped with high speed internet ports. Conference rooms are needed to accommodate up to forty (40) participants once per month, and up to one hundred (100) participants once per year.
  - Maintain meeting minutes as required for distribution to the designated Government entities.

### **Subtask 3.2. Administrative Support**

The Contractor shall provide senior level clerical and administrative support for senior executives in the DCTO(S&T). Administrative support shall utilize the MS Office Suite to include MS PowerPoint, MS Word, MS Access, and MS Excel. The Contractor should have knowledge and experience in management, international relations, international security, foreign affairs with the ability to interact effectively with staff at all levels of DoD and foreign governments. The Contractor shall have the ability to provide administrative support for meetings, correspondence, and gathering background information to support senior officials' attendance at international meetings.

The Contractor shall:

- Maintain the calendars of senior executives and coordinate the daily activities and travel schedules to resolve conflicting priorities and requirements and ensure support for attendance at high profile meetings.
- Answer the telephone and refer the calls to other responsible individuals within the office. The administrative support will serve as the interface with the public whenever there are inquiries concerning the office, including the greeting of high-level officials.
- Process incoming mail, including e-mail and facsimile, and route correspondence to the appropriate individual in the office for response and action.
- Maintain accountability of files and correspondence in the office, both in electronic and in paper form. The files should be readily accessible whenever the need arises to find historical documents.
- Coordinates schedules with the travel coordinator to ensure Official Government Travel is prepared as needed. The Contractor shall be able to assist as a backup to the DCTO(S&T) travel coordinator and be familiar with Defense Travel System (DTS) and Official Government Travel Regulations.
- Provide backup support duties for coordinating Special Compartmental Information Facility (SCIF) Management and Correspondence Control.
- Monitor the correspondence and task management system database (e.g., Correspondence and Task Management System (CATMS)) to ensure all taskers are reviewed, routed, and submitted on time.

### **5.1.4. Task 4: Reliance 21 Roadmap**

The Contractor shall possess broad knowledge and expertise in support of science and technology (S&T) roadmap maintenance, update and evaluation. The Contractor shall articulate the capabilities, accomplishments, and investment of S&T from a global perspective and ecosystem. In addition, identify and bridge technology gaps and provide recommendations and options, considering the entire S&T development life cycle. The goal of Reliance 21

is to ensure that the DoD S&T community provides solutions and advice to DoD's senior-level decision makers, warfighters, Congress, and other stakeholders in the most effective and efficient manner possible to meet joint warfighting needs. This is achieved through an infrastructure and ecosystem of technical coordination groups, known as Communities of Interest (COIs), that enable information sharing, alignment of efforts, coordination of priorities, and support for scientists and engineers across DoD's S&T enterprise.

There are currently 16 active COIs covering the following cross-cutting technical areas: 1) Advanced Electronics; 2) Air Platforms; 3) Armed Services Biomedical Research Evaluation and Management (ASBREM); 4) Autonomy; 5) Biotechnology 6) Command, Control, Communications, Computers and Intelligence (C4I); 7) Cyber; 8) Directed Energy; 9) Electronic Warfare (EW); 10) Energy and Power (E&P); 11) Ground and Sea Platforms (G&SP); 12) Human Systems; 13) Kinetic Weapons Technologies; 14) Materials and Manufacturing Processes (M&MP); 15) Sensors and Processing; and 16) Space.

Also under Reliance 21, R&E administers the Applied Research for the Advancement of S&T Priorities (ARAP) program. ARAP awards efforts that address a specific Applied Research (6.2 Research & Development funding type) Technology or Capability gap, enhances collaboration across DoD and the Services, presents a realistic program management plan, and demonstrates a clear pathway from research to product fielding. These awards may come as a one-year Seedling, or as a multi-year, multi-Service ARAP Project.

The Contractor shall:

- Assist in developing, shaping, and coordinating comprehensive COI roadmaps and requisite investments that capture the opportunity, activity, and impact of S&T investments for their respective domains.
- Outline major operational/capability needs or systems performance requirements, and portray current posture and future strategic vision.
- Support portfolio reviews to frame DoD's S&T leadership discussions regarding investment priorities, the current state of technology, and future directions that consider: 1) Reliance 21 Coordination and Governance; 2) Science and Technology Research; 3) Experimentation and Transitions; 4) Program Planning, Analysis, Requirements, and Reviews; 5) Modeling and Tool Development; 6) Innovative Research and Outreach; and 7) Special Studies.
- Assist in providing technical leadership, management oversight, policy guidance, and coordination in research and engineering programs, to include strategic recommendations on COI community structure, technical areas, and members.
- Provide objective and well-informed strategic insights that consider the role of crosscutting investment areas, and the investment space of the broader Federal, industrial, academic, and international communities.
- Develop periodic and ad-hoc deliverables to include SECDEF briefings, COI roadmaps, COI taxonomy updates, cross-COI collaboration recommendations and technical exchange materials, industry briefings, and strategic research proposals.
- Assist ad-hoc requests from S&T and the COIs for help in answering inquiries from senior DoD leadership, Congress, and the White House.
- Assist R&E in the evaluation, execution, and administration of the ARAP Seedling and Project proposals and programs. Provide strategic insight and thought leadership to assess level of innovation, alignment to DoD need and National Defense Strategy priorities, cost realism, and transition potential. Assist in scoring and ranking of project proposals, and in the development of any requisite briefing materials for record.
- Provide strategic guidance and technical advice to COIs developing, refining, and/or evaluating ARAP Seedling (expansion of basic research) and full ARAP Project proposals (leading potentially to the design and development of prototypes).

#### **5.1.5. Task 5: S&T Foundations Basic Research Office (BRO) Support**

##### **Subtask 5.1. BRO Support**

The Contractor shall:



- Provide input to strategic planning and to documentation of strategic plans at higher levels within OSD.
- Assist in goal setting for BRO within the Office of the Secretary of Defense and to continuing assessment of progress toward established goals. Goals should be set to advance the mission of BRO, to contribute to current leadership priorities, and to recommend new leadership priorities.
- Assist the Director for Basic Research in resource accounting, to include developing unfinanced requirement issue papers and other programmatic documentations.
- Organize research reviews, working group meetings, and users' groups. Invite attendees, locate meeting space, and coordinate logistics support. Assist in developing technical content and agenda. Prepare agendas, read-ahead documents, action items from meetings, other follow up documents as required.
- Maintain up-to-date and ongoing broad situational awareness of research and development efforts involving the BRO, including policies in the Department and/or federal government which impact the execution of the Department's basic research portfolio.
- Prepare draft papers, weekly reports, information papers, action memoranda, emails, and other Basic Research program documents.
- Support BRO in the execution of the Department's visa waiver program and assist, through participation in meetings and periodic development of policy documents, in the evaluation and promotion of policies which promote the Department's efforts to attract and retain top international talent in DoD basic research programs. Support for the visa waiver program will entail processing of visa waiver applications, collection of feedback from DoD personnel on the fitness of applicants, and advocacy for the program and policies that support the program within and outside of the Department as necessary.
- Support BRO in developing and maintaining policies which protect DoD-funded academic research from undue foreign influence in accordance with National Security Presidential Memorandum – 33. Support in this area will entail periodic development of policy documents; maintenance of situational awareness of research protection activities inside the DoD, at other federal agencies, and at academic institutions; and participation in meetings with stakeholders on open access to fundamental research as requested.
- Assist with resolving research grants and contracts clause issues related to fundamental research policy and research security for university research, and support BRO in working with DoD Components to ensure consistent application of fundamental research policy pursuant to the USD(AT&L) memorandum of May 24, 2010, "Fundamental Research."
- Provide management support for functions related to research business policy and procedures, including DoD and interagency grants policy. Support will entail regular communication with DoD grants managers and interagency grants policy experts, awareness and understanding of legislative actions and memoranda from the Office of Management and Budget, and development (as requested) of internal policy documents which implement changes to DoD grants policy.
- Provide background information and analysis to assist BRO in advocating for consistent and streamlined government-wide interagency research administration and grants policy.
- Assist drafting and editing of the Defense Grant and Agreement Regulatory System (DGARS) which includes updates to the DoD Grant and Agreement Regulations (DoDGARs) and other DoD issuances to include the DoD Research Misconduct Instruction, in part to reflect the current administrations' fundamental objectives of transparency and accountability, but also to reflect other legal and regulatory changes.
- Provide analysis and decision support, through meetings and communications to leadership/management in areas such as: grants and other instruments; indirect costs at universities, non-profit organizations, and other related performers; DoD and government-wide policies for award and administration of those instruments and related electronic business practices.
- Assist in analyzing and collecting data to support DoD's annual submission to the National Science Foundation (NSF) survey of Federal Science and Engineering Support to universities, colleges, and nonprofit institutions and the Survey for Federal Funds for Research Development.

#### **5.1.6. Task 6: DoD Laboratories Office Support**



### **Subtask 6.1. Historically Black Colleges and Universities/Minority-Serving Institutions (HBCU/MI)**

The Contractor shall:

- Assist in implementation of the OSD Historically Black Colleges and Universities Minority-Serving Institutions (HBCU/MI) program and oversight of DoD Component activities related to HBCU/MI. Activities include development of briefings, position papers, program metrics, and reports; collection and analysis of data; and working group meeting support.
- Support the four White House Initiatives Executive Orders for HBCUs/MIs and outreach related to the diversity, equity and inclusion related to workforce diversity and increasing minorities in science, technology, engineering, and mathematics disciplines through internship and faculty fellows' programs. Activities include the development and review of position papers, briefings, and annual agency plans.
- Conduct analysis and evaluation of DoD's HBCU/MI Program seven active Centers of Excellence that support the OUSD(R&E) critical technology areas. Activities include the development of a data call for research and educational capabilities management planning, monitoring, and program execution.
- Assist in the program management, preparation and coordination of the OSD/DoD HBCU/MI program solicitations and in analyzing the proposal application submissions to ensure successful and timely execution of program requirements and process. The frequency and volume of products are dictated by level of funding devoted to program solicitations. The funding varies from year to year due to Congressional activity.
- Following the release of the National Security Strategy, National Defense Strategy, and the USD(R&E) Critical Technologies priorities and objectives, assist in the development of program plans, strategies and metrics to ensure alignment and monitor programs objectives and/or goals.
- Support the development and coordination of congressional reports and plans as stipulated in the annual NDAA and Defense Appropriations in support of HBCUs/MIs. The outcome results in continued congressional support of the DoD HBCU/MI Program and annual program funding increases to support new research and educational activities in the program.
- Review and assist with inputs for HBCU/MI congressional inquiries, testimonies, and responses to questions for the record.
- Gather data from the DoD Components in support of the development of HBCU/MI Congressional Reports and Plans as outlined by the National Defense Authorization (NDAA) and the Defense Appropriations.

### **Subtask 6.2. STEM Development Office**

The Contractor shall:

- Support the development, management, evaluation, and analysis of DoD STEM activities (education, outreach and workforce development initiatives) to ensure that the Department's collective effort anticipates and responds to DoD STEM workforce needs.
- Conduct periodic analysis and evaluation of the effectiveness of existing policies, statutes, DoD Instruction(s), other strategic guidance and direction pertaining to STEM education, outreach, and workforce development.
- Support the development and coordination of the DoD STEM strategic plan, implementation plan, related policies, and capture program alignment with the Federal STEM Education Strategic Plan and the National Defense/Security Strategy.
- Provide program management support of the National Defense Education Program's (NDEP) STEM education, outreach, and workforce development activities such as: 1) Defense STEM Education Consortium (DSEC); 2) Manufacturing Engineering Education Program (MEEP); 3) Internal NDEP call for proposals; 4) Community College Regional Consortia; 5) External NDEP grant opportunities; 6) Enhanced Civics Education / Civil Society; and other NDEP Congressional initiatives.
- NDEP Program management support include:
  - monitoring program execution
  - monitoring budget execution to ensure schedule alignment;
  - analyzing program data and outcomes
  - assisting in the full life cycle of grants, cooperative agreements and/or contracts; and assist in the STEM PPBE process

- Support DoD STEM's active engagement in the Federal Coordination in STEM (FC-STEM) in accordance with the America Competes Reauthorization Act of 2010 by;
  - Attending various interagency working groups (IWGs),
  - Attending Federal Internships Community of Practice (FICOP)
  - Attending Federal STEM Communications COP.
  - Develop monthly reports on FC-STEM related efforts to share with DoD Leadership and Components.
- Support DoD STEM's strategic communications to internal and external stakeholders in promulgating a cohesive and coordinated Department-wide STEM effort across the K-20 education continuum by:
  - Conducting periodic analysis and literature research on effective approaches to amplify awareness of the depth and breadth of the DoD STEM's efforts through various media and platforms.
  - Managing information and communications support, including preparation of correspondence for the Director, monitoring the updates and maintenance of the DoD STEM website and social media, preparation and distribution of newsletters, and coordination of policies and issuances.
  - Engaging with internal and external stakeholder to identify best practices in outreach and communications quarterly, monthly, or as needed.
- In accordance with DoD Instruction 1025.11 (STEM DoDI) support the following :
  - Coordination of STEM Advisory Council Working Group (SACWG) and Evaluation Assessment Capability Working Group (EACWG) periodic meetings.
  - Establishment of STEM Advisory Council.
  - Collection of annual program data and development of annual program report to reflect on the Department's collective reach and impact.
  - Coordination of Component STEM engagement with internal and external partners, especially in engaging the Defense Laboratory Enterprise and its scientific and engineering workforce.
  - Encourage Components to partner with local, regional and national partners from academia, industry, not-for-profit organizations, and other Federal agencies to leverage reach, and maximize impact of STEM investments.
- Coordinate activities pertaining to the Evaluation Assessment Capability (EAC) to include:
  - Coordination of periodic meetings;
  - Establishment of common metrics; data collection, analysis, and development of report to reflect annual program data;
  - Periodic analysis and update of DoD STEM logic model or learning agenda;
  - Maintain repository of data and reports;
  - Support the development and maintenance of the DoD STEM data dashboard to include geographical information system (GIS) representation of program data
- Assist in the development of responses pertaining to annual data calls from OMB, OSTP (FC-STEM), DoD Leadership, and Congressional (report, study, request for information, or other data calls to include annual NDAA requirements).
- Assist in the coordination, planning, and execution of OSD-led STEM activities, to include coordination/engagement with Components, Labs/Centers, and their scientists and engineers.
  - Support program director in other administrative and programmatic aspects of DoD STEM portfolio activities.
  - Engage in integrated process team or other DoD working groups in support of the program director.
- Develop programmatic and technical material to include;
  - Prepare/update program overview or other briefs relative to DoD STEM activities
  - Prepare quarterly program reports; position papers; reports; testimony; task/milestone management;
  - Prepare monthly travel request requirements for director and team to conduct program site visits.
- Conduct periodic technical trends analysis, literature research, or other methods to survey/assess current trends in local, regional, and national STEM education, outreach, and workforce development efforts from academia, industry, not-for-profit organizations and other Federal agencies. Identify best practices and outcomes from trends analysis and literature research to and submit a report on findings and any pertinent recommendations.

### **5.1.7. Task 7: S&T Foundations DoD Laboratories Office FFRDC/UARC Support**

#### **Subtask 7.1. DoD Laboratories Office**

The Contractor shall:

- Identify and analyze business models for the DoD in-house laboratories for improvements in productivity of the Department-wide research and engineering enterprise.
- Identify the Department of Defense core technical competencies (CTC) and assess the support of the CTCs by the DoD's laboratories. (NOTE: a draft list of CTCs has been developed by the (DCTO(S&T)).
- Survey recognized world class laboratories within industry, academia and other government agencies to develop recommendations for improvements within the existing defense laboratory system.
- Support the development of a strategy to sustain a world class laboratory system.
- Identify required critical facilities, equipment and infrastructure for in-house laboratories.
- Improve linkage between the Defense Laboratory Enterprise, warfighter, technology program management and the Department of Defense budget process by continuation of the Unified Research and Engineering Database (URED).
- In partnership with the DTIC, support the URED, and provide assistance to the DoD Components in complying with the OUSD(R&E) data calls and requirements.
- Support strategy to expand rapid fielding capabilities of the DoD laboratories.
- Support Laboratory Office engagement on S&T Executive Committee (EXCOM) and associated S&T Deputies Council.
- Support the Lab Office by drafting the charters and engaging on established and planned Laboratory Quality Enhancement Panel subgroups (e.g., personnel subpanel, infrastructure subpanel).
- Update the biennial DoD laboratory demographics report.
- Keep an updated register of the DoD Laboratory Enterprise.
- Update DoD instructions and directives as required by DCTO(S&T).
- Gather data in support of the development of Congressional Reports.
- Support an independent panel review and analysis of DoD FFRDCs to assist the Government in its FFRDC oversight responsibilities. The results of this effort will assist the government in understanding the extent to which the FFRDC's management, processes, and products meet the criteria for an FFRDC as stipulated in FAR 35.017 and the DoD Instruction 5000.77. Provide a written report and presentation that summarizes the observations and recommendations of the panel. Electronic documents will be provided in the appropriate Microsoft Office format (e.g., Word or PowerPoint); if appropriate, the Government may ask that the documents be provided in compressed or PDF format.
- Prepare Congressional reports as directed from the annual National Defense Authorization Act.

#### **Subtask 7.2. Lab Day Support**

The OUSD(R&E) will be hosting two (2) Defense Laboratories Demonstration Days to highlight the important contributions of the science, technology, and engineering community within DoD's Laboratories, Engineering and Warfare Centers. The goal of the showcase is to increase awareness of the programs and projects (past, present, and future) being conducted in the DoD to senior leaders, program sponsors and program managers, Congressional staff, media, and the general public. The event will be held during Option Year 1 and Option Year 3 of this TO. The estimated number of attendees expected includes ~10,000 Pentagon employees and ~200 VIPs. There is no fee to attend this event. The government lead for this requirement is the Director, Defense Laboratories Office.

The Contractor shall:

- Develop and maintain a project plan of action and the milestones for each Lab Day.
- Assist the government lead with the obtaining needed equipment reservations and submission of proper permit applications needed to ensure compliance with Pentagon requirements (Form DD 2798).
- Develop web-based portal for VIP and key attendee registration information. This portal will collect information for participant and exhibitor badging, parking, transportation requirements and other pertinent information required by Pentagon Force Protection Agency for access to the Pentagon Reservation and entry to the Pentagon. The portal will also support staff announcements and coordination of product displays with ASD(R&E) and Service Public Affairs offices.

- Assist the government lead with the call for nominations, identification and selection of exhibitors. This will include the organization of logistics support requirements for selected exhibitors.

#### **5.1.8. Task 8: Infrastructure Development Office**

The Contractor shall support the Director of Infrastructure, DCTO(S&T), to develop and implement policy that supports cutting edge technologies and capabilities within the Department's laboratories and centers. Support the development, implementation, management, sustainment, evaluation, analysis and reporting of DoD infrastructure (INF) and Military Construction (MilCon) activities related to the DoD laboratories and centers. This will ensure that the Department's collective effort anticipates and responds to DoD INF needs, including activities to modernize DoD laboratories and centers that will enable and enhance their ability to conduct cutting-edge research and deliver the next generation defense mission capabilities.

#### **Subtask 8.1. Infrastructure Program Support**

The Contractor shall:

- Gather data and provide administrative support of all INF activities from creation, development, coordination, management, analysis, evaluation, implementing, sustainment, changing to updating.
- Develop INF programmatic and technical material to include, program overviews, briefs, data calls, reports, position papers, metrics, plans of action and milestones, and engage in integrated process team or other DoD INF working groups in support of the Director.
- Gather data, consolidate reports from multiple sources and assist in the development of responses, and reports pertaining to all INF annual and periodic data calls (report, study, request for information, or other data calls to include annual NDAA requirements, such as 2806 reports) from DoD leadership, OMB, OSTP, Congressional and other agencies/organizations.
- Provide support to all INF recognition activities and funding opportunities for the INF programs. Support includes call for nominees/proposals, evaluation and scoring, monitoring program and budget execution to ensure schedule alignment; analyzing program data and outcome; assisting in the full life cycle of grants, cooperative agreements and/or contracts; and assisting in the INF award and funding process.
- Develop and support tools and processes (e.g. metrics, databases, logic models, SharePoint) for management of INF related activities.
- Conduct technical trends analysis, literature research, or other methods to survey/assess current trends in local, regional, and national INF effectiveness of existing policies, statutes, DoD Instruction(s), other strategic guidance and direction pertaining to INF development initiatives, and construction development efforts from academia, industry, not-for-profit organizations and other Federal agencies. Identify best practices and outcomes from trends analysis and literature research to help inform program investments and to encourage continuous improvement of INF programs for broader reach and impact.
- Coordinate activities pertaining to the evaluation assessment capability to include: coordination of periodic meetings; establishment of common metrics; data collection, analysis, and development of report to reflect annual program data; periodic analysis and update of DoD INF logic model; maintain repository of data and reports; and support the maintenance of the DoD INF data as requested.
- Support the creation, management and updating of white papers, reports/articles on INF processes, program funding, innovating projects and programs and related functions.
- Develop and manage INF legislation and policy products, tracking tools and processes (tracking, recommendations, and related activities).
- Support the management and tracking of applicable legislation and policy for INF program.
- Support the development, management, coordination, evaluation, analysis, sustainment and updating of the DoD INF strategic plans, implementation plans, evaluation plans, related policies, DoD Instruction(s), and ensure alignment with the Federal INF Strategic Plan and the National Defense/Security Strategy.
- Support INF strategic communications to internal and external stakeholders to promulgate a cohesive and coordinated Department-wide INF efforts.
- Conduct periodic analysis and literature research and gather information/data on effective approaches to amplify awareness of the depth and breadth of the DoD INF's efforts through various media and platforms.



- Manage information and communications support, including preparation of correspondence for the Director, monitoring the updates and maintenance of the DoD INF websites, portals and social media, preparation and distribution of newsletters, and coordination of policies and issuances.
- Collect and manage INF success stories and lessons learned.
- Facilitate and coordinate with Components on INF programs.
- Support the INF DoD Metrics projects such as identify the DoD core technical competencies (CTC) and assess the support of the CTCs by the DoD's laboratories.
- Organize, prepare, coordinate, and provide all administrative support including working with within and outside DoD for INF activities and meetings including planning meetings, and drafting agenda and meeting minutes.
- Assist in the coordination, planning, development, evaluation, analysis, management, sustainment and execution of OSD-led INF activities and events, to include coordination/engagement with Components, Labs/Centers, and their scientists and engineers as well as governments and non-governmental organizations/companies.
- Support Components to partner with local, regional and national partners from academia, industry, not-for-profit organizations, and other Federal agencies to leverage reach, and maximize impact of DoD INF investments.
- Support Laboratory Quality Enhancement Panel (LQEP)-I subgroups activities, including all administrative support, including meeting minutes, for their quarterly meetings, activities and their subcommittees' activities.
- Support Director in other programmatic aspects of DoD INF portfolio activities as requested.
- Build a long term strategic plan for Lab MILCON and recapitalization. (Please note that with regard to the role of the Laboratories Office with the Services MILCON submissions, the Laboratories Office is providing coordination with the Deputy Under Secretary of Defense for Installations and Environment (DUSD (I&E)) and the Office of Science and Technology Policy (OSTP).

#### **Subtask 8.2. Defense Laboratory & Personnel Office Data Analyses**

The Defense Laboratory & Personnel Office (L&PO) conducts and collects various types of data on the performance of laboratory personnel systems, STEM outreach programs, technology transfer, infrastructure and federally funded research and development centers (FFRDCs). The goal of the data collections and databases is to assess the effectiveness and deficiencies on the various programs executing authorities and flexibilities authorized by Congressional language and inform leadership on the status of programs.

The contractor shall:

- Define data search criteria, establish cross references from multiple datasets, draw conclusions about the information the datasets contain, determine trends, and interpret the data into visual representations and reports.
- Assess requirements from L&PO and recommend data management tools and systems that are compliant with DoD IT systems and develop and implement standard data collection processes for the L&PO programs while minimizing additional workloads supporting communities.
- Provide technical expertise in collecting and analyzing data with appropriate visualization tools.
- Support periodic assessment of existing data management tools and systems, and make recommendations for improvements where necessary. The data analyst should be technically proficient in visualization tools like Tableau or ArcGIS, and function as the subject matter expert for these tools supporting L&PO.
- Work with L&PO teams to provide technical expertise in collecting, analyzing, and interpreting data/outcomes with appropriate visualization tools in presentations and reports.

#### **Subtask 8.3. Defense Laboratory & Personnel Office Technical Support**

The Defense Laboratory & Personnel Office (L&PO) serves as the primary sponsor's representative and has managerial responsibility for three federally funded research and development centers (FFRDCs); National Security Engineering Center, Software Engineering Center, and Lincoln Laboratory. The DoD policy specifies that the primary sponsor will conduct an annual technical review of each FFRDC as well as a comprehensive review every five years on the use and continuing need for the FFRDC.

The contractor shall:

- Recommend evaluation criteria for the annual technical review(s), assist in selecting review panel members, assist in the conduction of annual technical assessment(s), and prepare written summary of the review(s).
- Recommend evaluation criteria for the comprehensive technical review(s), assist in selecting review panel members, assist in the conduction of comprehensive technical assessment(s), and prepare written summary of the reviews.
- Provide technical expertise in collecting and analyzing data on each FFRDC.
- Support periodic assessment of ongoing technical efforts provided by the FFRDC, and make recommendations for improvements where necessary.
- Work with L&PO FFRDC staff to provide technical expertise in facilitating collaboration across the FFRDC program and the Department.

#### **Subtask 8.4. Defense Laboratory Directorate Support**

The Contractor shall provide administrative, professional, and technical support to the Defense Laboratory Directorate, which currently has seven (7) major program areas: 1) DoD Climate and Earth Systems Program; 2) DoD Environmental Toxicological Sciences Program; 3) DoD Human Research Protection Program and Animal Research Protection Program; 4) DoD Human Systems Program; 5) DoD Biological Sciences Program; 6) DoD Irregular Warfare, DoD Language, Program DoD Culture Training Program; and 7) DoD Medical RDT&E Program. The Contractor shall:

- Provide technical advice and input for management oversight, drafting policy guidance, and coordinating budget and Congressional Special Interest Items.
- Assist in preparing for meetings and workshops, to include coordination of calendars of senior DoD personnel; preparation of announcements, agendas, read-ahead documents, meeting minutes, and technical briefing materials; management of logistics, travel arrangements, and meeting-facility support; administration of action items; and preparation of summary of the evaluations.
- Prepare draft papers to include technical evaluations, weekly reports, information papers, action memoranda, emails, and other documents.
- Prepare presentation/briefing materials to include research of technical content, graphics, and production.
- Provide administrative support for office business policy and procedures.
- Maintain broad situational awareness of research and development efforts involving the Defense Laboratory Directorate program areas.
- Develop and maintain content/information for Defense Laboratory Directorate website and associated websites, to include coordination of content/information changes/edits/updates to website and verification of public releasability of website content/information.
- Assist in development and review of monthly newsletter, to include development and review of technical content; and coordination and dissemination of newsletter.
- Assist in preparing, editing, reviewing, monitoring, and/or facilitating documents and briefings for DoD-wide dissemination and public release.

##### **Subtask 8.4.1. DoD Medical Research, Development, Test, and Evaluation (RDT&E) Program**

- Assist in developing the portfolio management process to assess and update the portfolio investment strategy for the Program Objective Memorandum (POM) budgeting cycle, to include development of a uniform DoD-wide process to assess the current progress for each for subarea of the medical RDT&E portfolio; development of roadmaps of technology and regulatory development for subareas of the portfolio; and development of metrics for assessing progress, collaboration, adequacy of resources, and research coverage of capability gaps across the DoD.

##### **Subtask 8.4.2. DoD Human Systems Program**

- Maintain a log and repository of all Human Systems publicly-released briefings and documents.
- Assist in development of supporting documents for committees and activities, such as the Joint Human Systems Integration Steering Council and the Artificial Intelligence/Autonomy/Human-Machine Teaming workshops.

##### **Subtask 8.4.3. DoD Irregular Warfare, DoD Language and DoD Culture Training**

- Assist in development of supporting documents for committees and activities, such as the Irregular Warfare Senior Technical Advisory Group and Defense Language Steering Committee.

##### **Subtask 8.4.4. DoD Human Research Protection Program and Animal Research Protection Program**

- Assist in development of supporting policy documents associated with DoD Animal Use and Human Use policies/instructions.

#### **Subtask 8.4.5. DoD Environmental Science Research Program**

- Assist in development of supporting documents for committees and activities, such as the Strategic Environmental Research and Development Program (SERDP), National Science and Technology Toxics and Risks Subcommittee, and national and international research efforts (e.g., North Atlantic Treaty Organization (NATO) Human Factors and Medicine).
- Assist in the review, evaluation, coordination, integration, and synchronization of science and technology related to environmental toxicology, to include contaminants of emerging concern, Polyfluoroalkyl Substances/ Perfluorooctanoic acid, Toxic Industrial Chemicals/Toxic Industrial Materials (TICs/ITMs), and other exposure hazards expected to be encountered in warfighting environments.
- Develop quarterly newsletter and information papers/talking-points on product development accomplishments and activities within the DoD Medical RDT&E Program, to include collecting data and conducting interviews; obtaining or developing related graphics, pictures, samples, devices, and writing and formatting the articles.

### **5.1.9. Task 9: S&T Futures Directorate**

#### **Subtask 9.1. Technology Transfer Program Analyses**

The Contractor shall provide support to the Director of Infrastructure and Technology Transfer, DoD Laboratories and Personnel Office, and OUSD(R&E), to develop and provide policy guidance that supports cutting edge technologies and capabilities. In addition, support the development, management, implementation, report, sustainment, evaluation and analysis of DoD Technology Transfer (T2),

The contractor shall:

- Provide administrative support of all T2 activities from creation, development, coordination, management, analysis, evaluation, implementing, sustainment, and updating.
- Develop T2 programmatic and technical materials to include, program overviews, briefs, data calls, reports, position papers, metrics, plans of action and milestones, and engage in integrated process team or other DoD INF working groups in support of the Director.
- Collect data and consolidate reports from multiple sources and assist in the development of responses, reports pertaining to all T2 quarterly data calls (report, study, request for information, or other data calls to include annual NDAA requirements) from DoD leadership, OMB, OSTP, Federal Laboratory Consortium (FLC), National Institute of Standards and Technology (NIST), Congressional and other agencies/organizations.
- Provide support to all T2 recognition activities and funding opportunities [(Request for Applications (RFA), Request for Proposals (RFP), Request for Information (RFI), Call for Proposals (CFP)] for the T2 programs. Support includes, call for nominees/proposals, evaluation and scoring, monitoring program and budget execution to ensure schedule alignment; analyzing program data and outcomes; assisting in the full life cycle of grants, cooperative agreements and/or contracts; and assisting in the T2 award and funding process.
- Develop and support T2 tools and processes (e.g. metrics, databases, MS Teams, logic models, SharePoint) for management of T2 related activities.
- Develop, review, and manage T2 activities pertaining to the evaluation assessment capability to include: coordination of periodic meetings; establishment of common metrics; data collection, analysis, and development of report to reflect annual program data; periodic analysis and update of DoD T2 logic model or training agenda; maintain repository of data and reports; and support the maintenance of the DoD T2 data as requested.
- Provide administrative support for the creation, management and updating of white papers, reports, articles on T2 processes, program funding, innovating projects and programs and related functions.
- Develop, review and manage T2 legislation and policy products, tracking tools and processes (tracking, recommendations, and related activities).
- Provide administrative support for the management and tracking of applicable legislation and policy for T2.



- Provide administrative support for development, management, coordination, evaluation, analysis, sustainment and updating of the DoD T2 strategic plans, implementation plans, evaluation plans, related policies, DoD Instruction(s), and ensure alignment with the Federal T2 Strategic Plan and the National Defense/Security Strategy.
- Provide administrative support T2 for the strategic communications to internal and external stakeholders to promulgate a cohesive and coordinated Department-wide T2 efforts.
- Manage information and communications support, including preparation of correspondence for the Director, monitoring the updates and maintenance of the DoD T2 websites, portals and social media, preparation and distribution of newsletters, and coordination of policies and issuances.
- Collect and manage T2 success stories and lessons learned. Distribute to DoD T2 communities.
- Facilitate and coordinate T2 activities with Components on the following:
  - Identify the DoD core technical competencies (CTC) and assess the support of the CTCs by the DoD's laboratories to provide information to the DoD T2 communities.
  - Organize, prepare, coordinate and provide all T2 administrative support including working with within and outside DoD for T2 training activities and meetings including planning meetings, and drafting agenda and meeting minutes.
  - Assist in the coordination, planning, development, evaluation, analysis, management, sustainment and execution of OSD-led T2 activities and events, to include coordination/engagement with Components, Labs/Centers, and their scientists and engineers as well as governments and non-governmental organizations/companies.
  - Provide administrative support for Components to partner with local, regional and national partners from academia, industry, not-for-profit organizations, and other Federal agencies to leverage reach, and maximize impact of T2 investments.
  - Provide administrative support for Laboratory Quality Enhancement Panel (LQEP)-T2 subgroups activities, including all administrative support for their quarterly meetings, activities and their subcommittees' activities.
  - Support Director in other programmatic aspects of DoD T2 portfolio activities as requested.
  - Assist to improve strategy to use service laboratories to leverage private sector innovation and concurrently develop new business models for the T2 process to continuously improve the DoD T2 programs.
  - Conduct biannual T2 technical trends analysis, literature research, or other methods to survey/assess current trends in local, regional, and national T2 effectiveness of existing policies, statutes, DoD Instruction(s), other strategic guidance and direction pertaining to T2 development initiatives, and T2 development efforts from academia, industry, not-for-profit organizations and other Federal agencies. Identify T2 best practices and outcomes from trends analysis and literature research to help inform program investments and to encourage continuous improvement of T2 programs for broader reach and impact.
  - Conduct quarterly analysis and literature research and gather information/data on effective approaches to amplify awareness of the depth and breadth of the DoD T2's efforts through various media and platforms. Provide quarterly report from these activities.

#### **Subtask 9.2. Emerging Technologies Support (ET)**

The mission of the ET Directorate is supervision and oversight of Department of Defense Science and Technology efforts across ET Directorate areas including Munitions Technologies, Nuclear Delivery Systems Technologies, Operational Energy, Materials, Aerospace Technologies, Biotechnology, Quantum Information Sciences, Future G, Position Navigation and Timing Technologies, Biological and Cognitive Sciences, counter-unmanned systems technologies, and enabling manned and unmanned-platform technologies across the domains of air, land, sea, and space. The contractor shall:

- Provide assessments and analyses of ET Research, Development, Test and Evaluation (RDT&E) programs and technologies areas across Budget Activities 1-3, for use by OUSD(R&E) leadership during PPBE meetings, Service Reviews, and OSD reviews.
- Understand the current state of the art in platforms and weapons technology development across the government and private sector to assess quality and appropriateness of ongoing and planned DoD research and development programs; assist with mission of identifying and championing critical and enabling technologies research to support the warfighters needs across ET areas.



- Provide recommendations of platforms and weapons-related S&T efforts across the DoD as well as those which should be accelerated to provide near-term benefit to operational forces.
- Assist in developing a strategy for ET investments, including developing and analyzing different models, approaches or processes for such investments to inform ET and OSD leadership throughout PPBE process.
- Assist in executing the strategy for ET investments including: analyzing the needs and opportunities to be addressed; formulating solicitations or similar documents; and helping to organize and conduct the evaluation of project proposals.
- Assist with the management and oversight of ET investments as well as oversight of DoD investments across ET-related areas.
- Produce analytical products, directives, meeting minutes, reporting documentation, or other requirements necessary for the efficient management of DoD S&T efforts for review and approval by government personnel.
- Assist the ET team's support of the OUSD(R&E) regarding congressional issues by tracking legislative developments, congressional reporting requirements and congressional actions and helping to gather and prepare materials for congressional hearings.
- Execute and plan of Counter-Unmanned Aircraft Systems (C-UAS) studies, analysis, and simulation experiments to include large-scale collaborative engagement and swarming concepts/defense, track service lead studies, analysis, and experiments for S&T insights across the department.
- Work with DoD Joint Capability Office for Counter small- Unmanned Aircraft Systems (Cs-UAS) and the Director, Operational Test and Evaluation (DOT&E) to monitor C-sUAS T&E, experiments, assessments, testing protocols, and related events to ensure interoperability, reduce duplication of effort, and identify collaboration opportunities; collaborate with CCMDs on technical data sharing agreements, C2 interoperability, and development of a working Common Operating Picture (COP); support and serve as the OUSD(R&E) technical lead for UAS traffic management (UTM) initiatives and implementation of Federal Aviation Administration (FAA) mandated remote ID processes across the department; serve as OUSD(R&E) action officer POC with the interagency with respect to UAS/C-UAS.
- Establish and manage the day-to-day coordination of the Unmanned Systems Technologies (UxST) team and coordination with UxS S&T Reliance 21 COI; Support UxST office with UAS/C-UAS analysis efforts.
- Participate in FAA/Department of Homeland Security (DHS) C-UAS initiatives that may impact DoD/OUSD(R&E); Engage with Intelligence Community on UAS threat to keep OUSD(R&E) informed and assist in development of action plans to mitigate UAS threats to DoD and critical national assets.
- Provide programmatic assistance in managing Munitions Technologies office programs and perform technical assessments of technologies of interest to munitions focusing primarily on the prioritization of munitions technology (energetic materials, advanced propulsion, warhead technology, lethality, fuzing, sensors, communications) objectives. Resolve ambiguous and challenging tasks typically found in senior-level Federal Government scientific research and engineering offices.
- Provide technical analysis and management support of projects within the Platforms and Weapons Technologies directorate, to include the Munitions and Directed Energy S&T programs.
- Review program plans and related documents and document comments to identify and mitigate risks to the accomplishment of the Munitions Technologies projects and goals. Track progress and suggest alternate approaches for projects behind schedule.
- Develop decision-quality materials, program documents, and correspondences for scheduled and unscheduled in-process review meetings and briefings.
- Provide support to activities, meetings and projects to include: development of meeting agenda, management plans, and execution strategies; research and analysis of technical content and data; draft and review content (information papers, action memoranda, weekly activity reports, white papers and presentations); and accomplish coordination across required DoD offices.
- Draft and coordinate updates to DoD Directives among DoD offices. Coordinate with DoD offices to resolve comments that lead to the successful publication of a new Directive.
- Prepare and socialize program governance documents, charters, designation memos, describing program processes, roles and responsibilities, and outreach.

- Assist in development of DoD-wide ET S&T strategic plans and drafting documentation for DoD-wide dissemination.
- Assist in the POM development process, including the development of unfunded requirement issue papers and other programmatic documentations.
- Participate in various working group meetings, provide meeting minutes/action items, and produce draft responses on the action items/tasks.
- Provide assistance to project leads in complying with the Under Secretary of Defense for Research and Engineering (USD(R&E)) data calls and requirements.

#### **Subtask 9.2.1. Advanced Materials CTA Support**

The Contractor shall:

- Assist in identifying and monitoring baseline financial metrics to measure the value of Advanced Materials investments against strategic goals and objectives that, if implemented, can result in significant improvements in mission to mitigate identified threats and improve cost effectiveness.
- Support and attend designated program reviews of DoD and non-DoD Services/Agencies Communities of Interest and programs, to include Federally Funded Research and Development Centers (FFRDCs) and University Affiliated Research Centers (UARCs). Facilitate or lead deep dive, cross organizational teams into high-interest or game changing technology areas.
- Provide analysis and technical and programmatic support to the DoD S&T Reliance 21 Materials and Manufacturing Processes (M&MP) Community of Interest (COI) by assisting in objectively reviewing roadmaps and reporting, and provide recommendations for improvement that capture the opportunity, activity, and impact of S&T investments for their respective domains.
- Provide strategic guidance and technical advice to COIs developing, refining, and/or evaluating ARAP Seedling (expansion of basic research) and full ARAP Project proposals (leading potentially to the design and development of prototypes).
- Provide support to international programs, including the Technical Cooperation Panel (TTCP) and Subgroups, the US-Canada Continental Surveillance S&T Oversight Group, Australia, the United Kingdom, and the United States (AUKUS) cooperative programs, and the North Atlantic Treaty Organization Research and Technology Organization (NATO RTO), to include preparation of Terms of Reference (ToR), Data/Information Exchange Agreements, and other program related documents.
- Provide assistance to the DoD Components in complying with OUSD(R&E) data calls and requirements. Interacts with other Service/Component contracting offices to facilitate open issues and responses.
- Maintain broad situational awareness of research and development efforts involving Advanced Materials developments in the Basic Research Office, which have the potential to transition to higher TRLs to support the CTA priorities.
- Understand the current state of the art of materials for platforms and weapons technology development across the government and private sector to assess quality and appropriateness of ongoing and planned DoD research and development programs; assist with mission of identifying and championing critical and enabling technologies research to support the warfighters needs across ET areas.
- Maintain broad situational awareness of current and emerging research and development efforts involving the Advanced Materials priority areas, and prepare research and technical analyses to align assessments of new and emerging threats to state of the art materials technologies that have potential to defeat those threats. Provide objective and well-informed strategic insights that consider the role of cross-cutting investment areas, and the investment space of the broader Federal, industrial, academic, and international communities.
- Produce analytical products, directives, meeting minutes, briefings, reporting documentation, or other requirements necessary for the efficient management of DoD materials S&T efforts for review and approval by government personnel.
- Participate in various working group meetings, provide meeting minutes/action items, and produce draft responses on the action items/tasks.

#### **Subtask 9.3. Technology Industrial Innovation Base (TIIB) Workflow Coordinator**

The contractor shall:

- Maintain configuration and quality control of assignments at all times to assist with tasks.

- Conceive solutions and provide written materials, often in response to short-notice tasks assigned to TIIB.
- Coordinate and review official correspondence and presentation materials for completeness and accuracy.
- Review program plans and other related documents and provide comments to identify and mitigate risks to the accomplishment of the TIIB projects and goals. Track progress and suggest alternate approaches for projects behind schedule.
- Make recommendations for improvement of effectiveness and efficiency of the TIIB business processes.
- Provide support to activities, meetings and projects to include, but not limited to: development of meeting agenda, management plans, and execution strategies; research and analysis of data; draft and review content (info papers, action memos, white papers and presentations); and accomplish coordination across required DoD offices.
- Prepare official presentations (in the appropriate format including Microsoft (MS) PowerPoint and/or MS Word), official information and action memos, concept papers for new projects, official responses to public correspondence; and articles. The memos and other documents shall follow the standard established for the office and shall be appropriate for senior level government officials.
- Coordinate updates to DoD Directives among DoD offices. Coordinate with DoD offices to resolve comments that lead to the successful publication of a new Directive.
- Prepare official program documents and correspondences based on the TIIB input and direction and maintain accountability of associated program files and records.
- Perform research, information and reference-gathering on assigned topics using government data sources and open sources (web).
- Provide editorial support to review draft documents prepared by the S&T Futures offices for spelling accuracy, grammar correctness, logic flow, completeness, and compliance with DoD document preparation instructions.
- Provide support to ensure effective office operations (e.g., answer phones, deliver/receive administrative packages from other government offices packages).
- Conceive, construct and disseminate implementation status reports and program metrics to support discussion with senior leaders.
- Process incoming mail, including e-mail and facsimile, to route correspondence to the appropriate individual in the office for response and action.
- Maintain accountability of files and correspondence in the office, both in electronic and in paper form. The files should be readily accessible whenever the need arises to find historical documents.
- Monitor the correspondence and task management system database (e.g., Correspondence and Task Management System (CATMS)) to ensure all taskers are handled appropriately and in a timely manner.

#### **Subtask 9.4. Futures Support**

The Contractor shall:

- Provide support for management oversight, drafting policy guidance, and coordinating budget and Congressional Special Interest Items.
- Assist in preparing for meetings and workshops, to include coordination of calendars of senior DoD personnel; preparation of announcements, agendas, read-ahead documents, meeting minutes, and technical briefing materials; management of logistics, travel arrangements, and meeting-facility support; administration of action items; and preparation of summary of the evaluations.
- Prepare draft papers to include technical evaluations, weekly reports, information papers, action memoranda, emails, and other documents as requested.
- Prepare presentation/briefing materials to include research of technical content, graphics, and production.
- Maintain broad situational awareness of research and development efforts involving the S&T Futures Directorate program areas.
- Assist in preparing, editing, reviewing, monitoring, and/or facilitating documents and briefings for DoD-wide dissemination and public release.

- Assist in developing the portfolio management process to assess and update the portfolio investment strategy for the Program Objective Memorandum (POM) budgeting cycle. This includes development of a uniform DoD-wide process to assess the current progress for each subarea of the medical RDT&E portfolio; development of roadmaps of technology and regulatory development for subareas of the portfolio; and development of metrics for assessing progress, collaboration, adequacy of resources, and research coverage of capability gaps across the DoD.

#### **5.1.10. Task 10: Surge Support (various labor categories within scope of this PWS)**

OUSDR(R&E) anticipates the need for emerging in-scope requirement changes in response to OUSDR(R&E)'s missions. The Contractor will be required to provide additional support upon request via a surge CLIN. A surge CLIN will cover support where extra effort is required to take on short-term tasks. The Government will provide the Contractor with the detailed description(s) and purpose of the required services. Surge efforts are associated with Congressional mandated reports/studies and the Department of Defense directed tasks.

The Contractor shall provide additional intermittent support for tasks 1 through 9. The surge effort requires contractor support with significant experience or highly specialized technical capabilities. Once a surge becomes known, the Government will notify the Contractor in writing and issue a request for proposal (RFP). The Contracting Officer (CO) will modify the TO, adding the Surge CLIN to incorporate the Surge requirement. The Surge CLIN will be a Firm-fixed-price / level of effort CLIN.

### **6.0 ADMINISTRATIVE REQUIREMENTS**

#### **6.1 Travel and Other Direct Costs**

Contractor personnel may be required to travel to accomplish tasks, including Continental United States (CONUS) and Outside Continental United States (OCONUS) travel. OCONUS travel may include, but is not limited to, the United Kingdom, Australia, Canada, New Zealand and India. The Government will inform the Contractor of travel as early as possible. The Contractor shall be reimbursed for travel to provide support outside the NCR as approved by the COR. The Contractor shall provide a written request for travel to the COR, for review and approval, prior to finalizing any travel arrangements and no later than ten (10) business days prior to the departure date. All travel shall be approved by the COR prior to incurring expenses. The Contractor shall be reimbursed for actual allowable, allocable, and reasonable travel costs incurred during performance of this effort in accordance with FAR 31.205-46, "Travel Costs." Requests for approval of costs in excess of maximum per diem rates in accordance with the procedures contained in FAR 31.205-46 (a)(3) shall be submitted to the COR for final approval prior to commencement of travel. The expense of travel within the NCR shall not be reimbursed as a part of the Travel CLINs. Contractor personnel will be authorized travel expenses consistent with the substantive provisions of the Joint Travel Regulation (JTR) and the limitation of funds specified in this contract. All travel outside the NCR shall have Government approval/authorization and notification to the COR.

Contractors shall project necessary travel requirements to the COR for review and approval no later than seven (7) business days prior to the departure date. At a minimum, the below information shall be submitted for consideration:

- Traveler Name
- Location of Travel
- Dates of Travels
- Purpose/Requirement for Travel
- Government Sponsor Concurrence
- Cost Estimate identified by subject (i.e. lodging, , rental car, airfare)

Contractors traveling to OCONUS locations shall meet the countries specific requirements for entry identified in the Foreign Clearance Guide (FCG). The FCG is located at <https://www.fcg.pentagon.mil/fcg.cfm>.

Trip reports for all travel are due within ten (10) business days of trip end dates. Reports should include:

- Traveler Name
- Location of Travel
- Dates of Travels



- Purpose/Requirement for Travel
- Information Received/Discussed
- Outcome of Travel and Follow-up Actions Required
- Actual Costs and Receipts (Should match invoice submissions)

ODCs will be shown in the contract schedule as a separate Not to Exceed (NTE) CLIN and applicable to the general contract and during contractor performance of the tasks. Individual purchases shall not exceed \$3,500 per year. All ODCs associated with this contract shall be approved in writing by the COR before costs are incurred. The Contractor may be required to incur the cost of incidental items.

## 6.2 Invoicing

The Contractor shall invoice MONTHLY with description to include, invoice performance period, short description of services completed, ODC and any other information required by the COR after email submittal of monthly status report to the CO and COR. Travel charges must be shown per person, contain location and dates, and items shall be identified by subject (i.e., meals, rental car, and airfare requirements). Receipts for all single travel expenses of \$75 or more shall accompany the invoice in accordance with the Joint Travel Regulations (JTR). All travel expenses for this TO must comply with FAR 31.205-46 "Travel Costs," and this PWS.

## 6.3 Security Clearances

Contractor facility clearance shall be TOP SECRET (TS) and safeguarding requirement of SECRET (S). Contractor personnel performing work under this contract shall have clearance levels ranging from SECRET to TS/Special Compartmental Information (SCI) Special Access Programs (SAP)/Special Access Required (SAR) and shall maintain the level of security required for the life (base and all options, if exercised) of the contract. Table 1 below depicts the security requirements for each task.

**Table 1. Personnel Security Clearance Requirements**

<b>Task/Subtask</b>	<b>Program</b>	<b>Clearance</b>
Task 1	Program Management Support	TS/SCI
Subtask 2.1	Financial Manager	TS
Subtask 2.2	Financial Management/Budget Execution Support	TS/SCI S
Subtask 2.3	Specialized Support – Technology/Web	S
Subtask 2.4	Technical Integration Support	TS/SCI S
Subtask 3.1	Business and Operations Management	TS/SCI S
Subtask 3.2	Administrative Support	TS/SCI
Task 4	Reliance 21 Roadmap Support	TS/SCI
Subtask 5.1	BRO Support	S
Subtask 6.1	HBCU Support	S
Subtask 6.2	STEM Development Support	S
Subtask 7.1	DoD Laboratories Office Support	TS/SCI S
Subtask 7.2	Lab Day Support	S
Subtask 8.1	Infrastructure Program Support	S
Subtask 8.2	Defense Laboratory & Personnel Office	S
Subtask 8.3	Defense Laboratory & Personnel Office	TS/SCI
Subtask 8.4	Defense Laboratory Directorate Support	TS/SCI S
Subtask 9.1	Technology Transfer Program	S

Subtask 9.2	Emerging Technologies Support	TS/SCI CNWDI
Subtask 9.3	TIIB Support	S
Subtask 9.4	Futures Support	TS/SCI S

The Contractor shall comply with all security requirements contained in the TO contract DD Form 254, DoD Contract Security Classification Specification and the terms and conditions set forth in FAR clause 52.204-2 Security Requirements, incorporated by reference in the base IDIQ. Security procedures shall be in accordance with DoD policies.

#### **6.4 Security Requirements**

Contractors are required to report any derogatory information that may justify an unfavorable administrative action in a personnel security or building access determination to the Pentagon Force Protection Agency (PFPA). Derogatory information includes, but is not limited to, criminal conduct, illegal drug involvement, or psychological conditions that impair judgment, reliability, or trustworthiness. The Contractor shall provide a derogatory information to the COR and CO as promptly as possible, but in no later than three business days after the Contractor becomes aware of the information.

PFPA reserves the right and prerogative to deny and/or restrict facility and information access of any Contractor personnel determined by PFPA at any time during performance to be unsuitable for access and/or present a risk of compromising sensitive Government information to which they would have access under this TO.

A determination by PFPA that a person is not suitable to perform work under this TO is not a denial, suspension, or revocation of a previously granted security clearance by another agency, nor shall it be interpreted as a direction or recommendation to the Contractor regarding the suitability of an affected individual for employment outside the scope of PFPA.

##### **6.4.1 Physical Security**

The Contractor shall be responsible for safeguarding all Government equipment, information, and property provided for Contractor use. The Contractor shall secure Government facilities, equipment, and materials at the close of each work period.

Physical access to federally controlled facilities will be required and identity verification will be in compliance with FAR clause 52.204-9 Personal Identity Verification of Contractor Personnel. The Government will provide facility access, required building identification, and required systems access in order for personnel to perform their duties, which is in accordance with existing OSD facility access security procedures. The Contractor shall comply with all WHS and OSD Operational Security guidelines, directives and complete OSD mandatory training on an annual basis for Information Assurance and Security, Controlled Unclassified Information (CUI), and Cyber Awareness.

##### **6.4.2 Keys, Badge and Common Access Card (CAC) Control**

The Contractor shall establish and implement methods of making sure all, badges, and CACs issued to the Contractor by the Government are not lost or misplaced and are not used by unauthorized persons. The Contractor shall prohibit the use of Government issued keys/key cards by any persons other than the authorized Contractor personnel. The Contractor shall prohibit the opening of locked areas by Contractor personnel to permit entrance of persons other than authorized Contractor personnel engaged in the performance of assigned work in those areas, or personnel authorized entrance by the CO.

NOTE: No keys issued to the Contractor by the Government shall be duplicated. The Contractor shall develop procedures covering key, badge, and CAC control that shall be included in an established Quality Control (QC) Plan. Such procedures shall include prompt return of any issued keys, badges, and CACs by personnel who no longer require access. The Contractor shall immediately report any occurrences of loss or other issues to the COR.

##### **6.4.3 Lock Combinations**

The Contractor shall establish and implement methods of ensuring that all lock combinations are not revealed to unauthorized persons. The Contractor shall ensure that lock combinations are changed when contractor personnel having access to the combinations no longer have a need to know such combinations.

#### **6.4.4 Disclosure of Information**

Information made available to the Contractor by the Government for the performance or administration of this effort shall be used only for those purposes and shall not be used in any other way without the written consent of the CO. Contractor and/or Contractor personnel shall not divulge or release data or information developed or obtained in performance of this effort, until made public by the Government, except to authorize Government personnel or upon written approval of the CO. The Contractor will not use, disclose, or reproduce proprietary data that bears a restrictive legend, other than as required in the performance of efforts within this TO. Nothing herein will preclude the use of any data independently acquired by the Contractor without such limitations or prohibit an agreement at no cost to the Government between the Contractor and the data owner which provides for greater rights to the Contractor.

The Contractor agrees to assume responsibility for protecting the confidentiality of Government records, which are not considered public information. Contractor personnel to whom information may be made available or disclosed, shall be notified in writing by the Contractor that such information may be disclosed only for purposes and to the extent authorized within the individual TO. The Contractor shall not release any information received through this TO to the public, media, or other unauthorized persons or organizations unless the Government has conducted the appropriate security review and granted written approval (e.g., posting information to a public website). Performance of this effort may require the Contractor to access and use data and information proprietary to a Government agency or Government Contractor, which is of such a nature that its dissemination or use, other than in performance of this effort, would be averse to the interests of the Government and/or others. The Contractor will sign non-disclosure agreements at the beginning of this TO certifying that none of the information received through their work on this TO may be disseminated in any manner other than as allowed in the order.

#### **6.4.5 Identification of Contractor Personnel**

All Contractor personnel attending meetings, answering Government telephones, and working in other situations where their Contractor status is not obvious to third parties are required to identify themselves as such to avoid creating an impression in the minds of members of the public that they are Government officials. They must also ensure that all documents or reports produced by Contractors are suitably marked as Contractor products or that Contractor participation is appropriately disclosed. Contractor personnel will be required to obtain and wear badges in the performance of this service. Contractor personnel that need access to Government systems and work locations will be issued CAC as required.

#### **6.5 Non-Personal Service Statement**

**Contractor personnel performing under this PWS will be managed, directed and supervised at all times by the Contractor PM.** The Contractor PM will ensure that Contractor personnel properly comply with the performance work standards outlined in this PWS. Contractor personnel will perform their duties independent of, and without the supervision of, any Government official. The services and performance required under this TO are determined to be not inherently governmental. The Contractor shall not perform or give the appearance of performing inherently governmental functions as described in FAR Part 2 and Subpart 7.5, and all applicable DoD policy. The tasks, duties, and responsibilities set forth in this TO may not be interpreted or implemented in any manner that results in any Contractor employee creating or modifying Federal policy, obligating the appropriated funds of the United States (U.S.) Government, overseeing work of Federal employees, providing direct personal services to any Federal employee, or otherwise violating the prohibitions set forth in FAR Subparts 7.5 and 37.1. The Government will perform the inspection and acceptance of the deliverables provided.

#### **6.6 Subcontracting**

The Contractor is encouraged to subcontract with other Contractors, or subject matter experts, or otherwise obtain consultant services for the efforts defined within the PWS, or to provide the expert talent needed to perform requirements within the TO. When providing subcontractors and/or consultants, the Contractor is fully responsible for their performance and cost reporting. The prime Contractor will manage work distribution to ensure there is no Organizational Conflicts of Interest (OCI). Contractors may add subcontractors to their team after notification to the CO and COR, and subsequent approval by the CO. The Contractor shall provide the manpower required to manage



all subcontracts and consultant efforts and to monitor subcontractor activities to the appropriate level of detail required to assure timely deliverables. A report on the performance of subcontractors shall be included as part of the required monthly progress report deliverable.

## **6.7 Personnel**

### **6.7.1 Performance**

The Contractor shall provide highly qualified, team oriented, and innovative professionals dedicated to the development and implementation of OUSD(R&E) programs and services. The Contractor shall function as a coordinated support team in grasping complex concepts and technologies, applying critical and innovative thinking, communicating effectively, and working seamlessly across the breath of functional areas. All Contractor personnel proposed shall meet the qualifications set forth as identified within the PWS.

### **6.7.2 Training**

The Contractor shall participate in organizational training as required by OSD.

### **6.7.3 Positions**

The Contractor shall hire and retain a quality work force, with minimal turnover in Contractor personnel. The Contractor shall appoint a PM with overall responsibility for the TO. The PM shall be the single point of interface with the Government for all matters concerning the TO including, but not limited to, technical progress, work related issues, program performance, schedule, cost, resources, and other program-related matters.

An integral part of successful performance under this TO is not only the production of quality products described in Section 5 above, but also the responsiveness of Contractor personnel in the day-to-day output of work products. While the end product or deliverable is vital to successful performance, day-to-day oversight also includes customer interaction and responsiveness.

### **6.7.4 Workforce Categories**

The Contractor shall provide qualified personnel for the positions under this TO. Technical Exhibit 1 documents the labor categories that will be used in this task order. Technical Exhibit 2 aligns labor categories with primary subtasks to assist the contractor with identifying qualified personnel for this TO.

### **6.7.5 Key Personnel**

The Contractor shall ensure the availability of Key Personnel with the requisite skills to perform the work detailed in this PWS. The Government designates one (1) position as Key Personnel as outlined below:

- Senior Financial Analyst (Financial Manager – Subtask 2.1) - 1 Key Personnel

## **6.8 Substitution of Team Members and Substitution of Personnel**

The Contractor agrees to assign to the TO those key person(s) identified with the TO response necessary to fulfill the requirements of the TO. During the first 90 days of performance, the Contractor shall make no substitutions of Key Personnel unless illness, death, or termination of employment necessitates the substitution. The Contractor shall notify the CO and COR as soon as possible after the occurrence of any of these events and provide the information required below. After three (3) months, no substitution shall be made without prior notification to and concurrence of the CO and COR in accordance with this requirement in writing.

All proposed Key Personnel substitutions shall meet the requirements of the labor category for the position. The Contractor shall notify the CO and COR in writing of any proposed substitution at least 30 days, or 60 days if a security clearance is to be obtained, in advance of the proposed substitution. Such notification shall include:

- an explanation of the circumstances necessitating the substitution;
- a complete resume of the proposed substitute; and
- any other information requested by the CO to enable him/her to judge whether or not the Contractor is maintaining the same high quality of personnel that provided the partial basis for award.



The CO will notify the Contractor within 15 calendar days after receipt of all required information of the decision on proposed substitutions.

Substitution of Non-Key Personnel is at the discretion of the Contractor; however, all proposed substitutions shall meet the applicable educational and experience requirements set forth in the PWS for the substituted position.

#### **6.8.1 Conduct**

Contractor personnel shall present a professional appearance at all times consistent with the usual and customary workforce attire of the assigned Government on-site locations, and their conduct shall not discredit the U.S. Government. The Government, at its sole discretion, may request the Contractor to remove any Contractor personnel from Government facilities for misconduct, failure to perform, security reasons, or other appropriate reasons that may jeopardize the success of the mission. The CO may provide the Contractor with a written explanation to support any request to remove an employee. Removal of Contractor personnel does not relieve the Contractor of the responsibility to continue providing the services required under this TO.

#### **6.8.2 NDAs**

The Contractor may be required to access Confidential, Proprietary, and/or Sensitive Information held by the Government related to the tasks to be performed under this TO. In consideration of the Government granting the Contractor access to this information, an NDA shall be required between the Contractor and the Government. The terms and conditions are described in detail within the NDA. This agreement shall be signed by all Contractor personnel working under this TO and submitted within five business days after TO award to the CO and COR. The Contractor shall ensure that all Contractor personnel (including subcontractors) use said information only to meet the requirements of this TO. The Contractor (to include subcontractors) shall not disseminate proprietary information or place said information at risk of disclosure unless required and authorized by this TO. If Contractors are replaced during the performance of this TO, then new Contractor personnel shall sign the NDA upon beginning work.

#### **6.8.3 Non-personal Services/Inherently Governmental Functions**

All services described in this PWS are non-personal services, and the Contractor shall not perform any inherently governmental functions.

#### **6.8.4 Data Rights**

The Government has unlimited rights to all documents/material produced under this task order in accordance with Defense Federal Acquisition Regulation Supplement (DFARS) 252.227-7015.

The Contractor agrees to assume responsibility for protecting the confidentiality of Government records, which is not considered public information. The Contractor shall not release any information related to this contract to the public, media or other unauthorized persons or organizations unless the Government has conducted the appropriate security review and granted written approval (e.g., posting information to a public website). The Contractor shall not use, disclose, or reproduce proprietary data that bears a restrictive legend, other than as required in the performance of this effort.

#### **6.9 Telework**

Contractor personnel covered under this TO are authorized to Telework upon receipt of the COR approval. Telework privileges are subject to advance scheduling based on need and required deliverables, with written approval from the COR. The Contractor must submit a telework plan identifying the need for telework and the deliverables to be accomplished (e.g., plan of the day), along with a formal agreement, or another form of agreement as requested by the COR. Contractor personnel must comply with criteria and guidelines established by the DoD Chief Information Office and its respective Components for using both GFP and non-GFP and for access to DoD information systems and networks to perform telework. Telework arrangements may be revised or terminated at the Government's discretion by the COR. Certain positions will not be authorized telework due to the duties/task required to be performed on-site.

#### **6.10 Service Contract Reporting (SCR)**

The Contractor shall report ALL Contractor labor hours required for performance of services provided under this TO via a secure data collection site. The Contractor is required to completely fill in all required data fields using the following web address: <https://www.sam.gov/>. Reporting inputs will be for the labor executed during the period of performance during each Government Fiscal Year (FY), is designated from October 1 through September 30. While inputs may be reported any time during the FY, all data shall be reported no later than October 31 of each calendar year. Contractors may direct questions to the web address help desk: <https://www.sam.gov/>.

## 7.0 DELIVERABLES AND SCHEDULE

In fulfillment of this effort, the Contractor shall provide specific deliverables as outlined in this PWS and summarized in the table below. All deliverables must meet professional standards and satisfy the requirements set forth in **contractual documentation**. The Contractor will be responsible for delivering all items specified. The dates by which specific deliverables shall be submitted will be as mutually agreed upon between the Government and the Contractor. All deliverables shall be submitted to the COR or the designated Government lead for the specific organizational area. In addition to the reports listed below, additional reports/products may be requested as deemed necessary.

<b><u>DELIVERABLE</u></b>	<b><u>FREQUENCY</u></b>	<b><u># OF COPIES</u></b>	<b><u>MEDIUM/FORMAT</u></b>	<b><u>SUBMIT TO</u></b>
Task 1; Contractor Program Management Plan (CPMP). See section 7.3.	Finalized within ten (10) business days of award; updated annually	1	Electronic. MS Word or e-mail	COR
Task 1; Monthly progress report	15th of each month	1	Electronic, MS Word, PowerPoint, by e-mail	COR
Task 2 Subtask 2.1; POM and BES	Quarterly	1	Electronic, MS Word, MS Excel, MS PowerPoint, or Adobe PDF format, unless otherwise specified by the Government lead.	Government lead, unless otherwise specified by the subtask Government lead
Task 2 Subtask 2.1; DoD PPBE support	Quarterly	1	Electronic, MS Word, MS Excel, MS PowerPoint, or Adobe PDF format, unless otherwise specified by the Government lead.	Government lead, unless otherwise specified by the subtask Government lead
Task 2 Subtask 2.2; DoD PPBE support	Quarterly	1	Electronic, MS Word, MS Excel, MS PowerPoint, or Adobe PDF format, unless otherwise specified by the Government lead.	Government lead, unless otherwise specified by the subtask Government lead
Task 2 Subtask 2.2; President's Budget and POM/BES	Quarterly	1	Electronic, MS Word, MS Excel, MS PowerPoint, or Adobe PDF format, unless otherwise specified by the Government lead.	Government lead, unless otherwise specified by the subtask Government lead
Task 4 Subtask 4.1; ARAP Seedling and Project proposals and programs	Annually	1	Electronic, MS Word, MS Excel, MS PowerPoint, or Adobe PDF format, unless otherwise specified by the Government lead.	Government lead, unless otherwise specified by the subtask Government lead

<b><u>DELIVERABLE</u></b>	<b><u>FREQUENCY</u></b>	<b><u># OF COPIES</u></b>	<b><u>MEDIUM/FORMAT</u></b>	<b><u>SUBMIT TO</u></b>
Task 4 Subtask 4.1; Development and refinement of COIs and/or evaluating ARAP Seedlings	Annually	1	Electronic, MS Word, MS Excel, MS PowerPoint, or Adobe PDF format, unless otherwise specified by the Government lead.	Government lead, unless otherwise specified by the subtask Government lead
Task 5 Subtask 5.1; NSF Survey Support	Annually	1	Electronic, MS Word, MS Excel, MS PowerPoint, or Adobe PDF format, unless otherwise specified by the Government lead.	Government lead, unless otherwise specified by the subtask Government lead
Task 6 Subtask 6.1; Development of HBCU/MI Congressional Reports	Annually	1	Electronic, MS Word, MS Excel, MS PowerPoint, or Adobe PDF format, unless otherwise specified by the Government lead.	Government lead, unless otherwise specified by the subtask Government lead
Task 6 Subtask 6.2; Prepare and update program overview or other briefs relative to DoD STEM activities	Monthly	1	Electronic, MS Word, MS Excel, MS PowerPoint, or Adobe PDF format, unless otherwise specified by the Government lead.	Government lead, unless otherwise specified by the subtask Government lead
Task 6 Subtask 6.2; Prepare quarterly program reports; position papers; reports; testimony; task/milestone management	Quarterly	1	Electronic, MS Word, MS Excel, MS PowerPoint, or Adobe PDF format, unless otherwise specified by the Government lead.	Government lead, unless otherwise specified by the subtask Government lead
Task 6 Subtask 6.2; Prepare monthly travel request requirements for director and team to conduct program site visits	Monthly	1	Electronic, MS Word, MS Excel, MS PowerPoint, or Adobe PDF format, unless otherwise specified by the Government lead.	Government lead, unless otherwise specified by the subtask Government lead
Task 6 Subtask 6.2; Conduct technical trends analysis and literature research	Annually	1	Electronic, MS Word, MS Excel, MS PowerPoint, or Adobe PDF format, unless otherwise specified by the Government lead.	Government lead, unless otherwise specified by the subtask Government lead
Task 7 Subtask 7.1; Prepare Congressional Reports	Quarterly	1	Electronic, MS Word, MS Excel, MS PowerPoint, or Adobe PDF format, unless otherwise specified by the Government lead.	Government lead, unless otherwise specified by the subtask Government lead
Task 8 Subtask 8.1; Build a long term strategic plan for Lab Military Construction	Annually	1	Electronic, MS Word, MS Excel, MS PowerPoint, or Adobe PDF format, unless	Government lead, unless otherwise specified by the subtask Government lead

<b><u>DELIVERABLE</u></b>	<b><u>FREQUENCY</u></b>	<b><u># OF COPIES</u></b>	<b><u>MEDIUM/FORMAT</u></b>	<b><u>SUBMIT TO</u></b>
			otherwise specified by the Government lead.	
Task 8 Subtask 8.4.5; Develop Quarterly Newsletter	Quarterly	1	Electronic, MS Word, MS Excel, MS PowerPoint, or Adobe PDF format, unless otherwise specified by the Government lead.	Government lead, unless otherwise specified by the subtask Government lead
Task 9 Subtask 9.1; T2 technical trends analysis	Bi-Annual	1	Electronic, MS Word, MS Excel, MS PowerPoint, or Adobe PDF format, unless otherwise specified by the Government lead.	Government lead, unless otherwise specified by the subtask Government lead
Task 9 Subtask 9.1; T2 analysis and literature research	Quarterly	1	Electronic, MS Word, MS Excel, MS PowerPoint, or Adobe PDF format, unless otherwise specified by the Government lead.	Government lead, unless otherwise specified by the subtask Government lead
Section 6.1; Travel Requests	No later than seven (7) business days prior to the departure date.	1	Electronic. MS Word, PowerPoint, by e-mail	COR
Section 6.1; Trip Reports	Within ten (10) business days of trip end dates	1	Electronic. MS Word or PowerPoint	COR
Section 6.2; Invoicing	Monthly	1	Electronic. MS Word or PowerPoint	COR
Section 6.10; Service Contract Reporting	Annually before October 31.			<a href="https://www.sam.gov">https://www.sam.gov</a>
Section 7.1; Transition Phase-Out Plan	No later than 30 calendar days prior to contract conclusion	1	Electronic. MS Word or e-mail	COR
Section 7.2; Post-Award Contract Kickoff Meeting	Within ten (10) business days after award		In Person/Virtual	CO and COR
Section 7.2; Post-Award Technical Kickoff Meeting	As scheduled		In Person/Virtual	CO and COR

Unless otherwise specified, the Government will have a maximum of ten (10) business days from the day the draft deliverable is received to review the document, provide comments back to the Contractor, or approve/disapprove the deliverable(s). The Contractor will have a maximum of ten (10) days from the day comments are received to incorporate all changes and submit the final deliverable to the Government.

The Contractor shall maintain the required capability over the period of performance. Within the period of performance, the Contractor shall complete all tasks within the allotted schedule. The COR shall provide the authorization to proceed and determine the task initiations via email, as necessary, to the Contractor PM. At the COR's discretion, the delivery dates may be adjusted.

The format for individual deliverables will be determined through consultation between the COR and the Contractor at the Post Award Conference (Section 7.2) and identified in writing then provided to the CO, COR, and the



Contractor. Products that reflect the Contractor's analysis and opinion (e.g., studies or analyses) may be in Contractor format. Products that are to be used by the Government in the execution of its responsibilities will be in a specified Government format. All documents will be provided in either hard copy or electronic format as requested by the COR. Electronic documents will be provided in the appropriate Microsoft Office format (e.g., Word or PowerPoint); if appropriate, the Contractor may be asked to provide in compressed or Portable Document Format (PDF).

All deliverables developed under this TO become the property of the U.S. Government. At Government request upon TO completion, the Contractor shall transfer all tools, licenses, computer resources, data, and artifacts produced or acquired under this TO, to the Government.

### **7.1 Phase in/ Phase out Period**

During the phase-in period, the Successor Contractor will work with the Incumbent Contractor in order to commence full performance of services on the contract effective date, minimize any decreases in productivity, and prevent possible negative impacts on services. During the phase-in period, the Successor Contractor shall become familiar with performance requirements, and shall complete all necessary administrative requirements such as badging. The phase-in period will be for four (4) weeks, to allow adequate time for the Successor Contractor personnel to receive CAC and Building Passes while working with the Incumbent Contractor staff to transition work-in-progress actions. The phase-in period shall not interfere with the production efforts of current contract personnel.

In Accordance With (IAW) FAR 52.237-3 Continuity of Services. During the phase-out period, the Incumbent Contractor shall be fully responsible for all current contract services. The Incumbent Contractor shall present a phase-out plan to the Government no later than 60 days prior to contract conclusion, which discusses the overall approach to transition the performance requirements. During the phase-out period, the Incumbent Contractor will establish a team to work with the Successor Contractor in order to commence full performance of services on the contract expiration date, minimize any decreases in productivity, and prevent possible negative impacts on additional services. The phase-out period will be for four (4) weeks, to allow adequate time for the Successor Contractor personnel to receive CAC and Building Passes while working with the Incumbent Contractor staff to transition work-in-progress actions. The phase-out period shall not interfere with the production efforts of current contract personnel.

### **7.2 Post Award Conference/Periodic Progress Meetings**

The Contractor agrees to attend a post-award contract kick-off meeting within ten (10) business days after award, convened by the contracting activity or contract administration office, in accordance with FAR Subpart 42.5. The Contractor shall also attend a technical kick-off meeting to discuss technical expectations. The CO, COR, and other Government personnel, as appropriate, may meet periodically with the Contractor to review the Contractor's performance. At these meetings, the CO will apprise the Contractor of how the Government views the Contractor's performance and the Contractor shall apprise the Government of problems, if any, being experienced. Appropriate action shall be taken to resolve outstanding issues. These meetings shall be at no additional cost to the Government.

### **7.3 Contractor Project Management Plan (CPMP)**

The CPMP lays out the Contractor's approach, timeline, and tools to be used in execution of the contract. The CPMP should take the form of both a narrative and graphic format that displays the schedule, milestones, risks, and resource support. The CPMP shall also include how the Contractor shall coordinate and execute planned, routine, and ad hoc data collection reporting requests as identified within the PWS. Within the CPMP, the Contractor shall develop and maintain an effective quality control program to ensure services are performed in accordance with this PWS. The Contractor shall develop and implement procedures to identify, prevent, and ensure non-recurrence of defective services. The Contractor's quality control program is the means by which it assures itself that the work complies with the requirement of the contract. The initial baseline CPMP shall be concurred upon and finalized within ten (10) business days after contract award, and updated as needed thereafter, but no less than annually.

## **8.0 PERFORMANCE STANDARDS AND QUALITY MEASUREMENT**

### **8.1 Quality Assurance Surveillance Plan (QASP)**

The Government shall evaluate the Contractor's performance under this contract in accordance with the Quality Assurance Surveillance Plan (QASP). This plan is primarily focused on what the Government must do to ensure that the Contractor has performed in accordance with the performance standards. It defines how the performance standards will be applied, the frequency of surveillance, and the minimum acceptable defect rate(s).

### 8.1.1 Performance Requirements Summary

The Contractor service requirements are summarized into performance objectives that relate directly to mission essential items. The performance threshold briefly describes the minimum acceptable levels of service required for each requirement. These thresholds are critical to mission success.

<b>Performance Objective</b>	<b>Standard</b>	<b>Performance Threshold</b>	<b>Method of Surveillance</b>
Provide support personnel to meet the PWS tasks in Section 5.	All contractor personnel possess the skills needed to perform the required tasks as specified in the PWS.	<ul style="list-style-type: none"> <li>•95% of Contractor personnel possess the needed skills within two (2) weeks of processing to the office.</li> <li>•95% of Contractor's work products are suitable to provide the full range of support as specified in the PWS.</li> <li>•95% of Contractor's personnel are qualified and adept at supporting and interacting with senior executives.</li> </ul>	COR/Government personnel feedback
Submit a monthly progress report in Task 1.	<ul style="list-style-type: none"> <li>• Accurately reflects progress and status.</li> <li>• Proactively identifies and addresses any problems or issues encountered.</li> <li>• Recommended resolutions are feasible and likely to succeed in resolving issues.</li> <li>• Report is submitted by the 15<sup>th</sup> workday of the following month.</li> </ul>	<ul style="list-style-type: none"> <li>• Solutions or resolutions are accepted for 80% of issues.</li> <li>• 95% of draft documents contain minor typographical errors.</li> <li>• 95% of final documents are error free and professional in appearance.</li> </ul>	COR/Government personnel feedback
Hours of Work / Workload Management in support of Section 5.	<ul style="list-style-type: none"> <li>• Contractor ensures sufficient staff is available on-site at all times during core business hours to support assigned requirements.</li> <li>• Contractor ensures its personnel accomplish the assigned tasks within agreed upon schedules, and at an acceptable level of quality.</li> </ul>	<ul style="list-style-type: none"> <li>• No workload interruption or stoppage is encountered in response to management data requests or information.</li> <li>• Time away or out of office is managed to ensure at least 75% of staff is available during core business hours, with the exception of holidays or periods of inclement weather, to proactively interact with clients and complete the requirements specified in the PWS.</li> <li>• Contractor ensures the COR is informed of developments with assigned actions.</li> </ul>	COR/Government personnel feedback
Services and Deliverables	Contractor provides the full range of services required to support the	<ul style="list-style-type: none"> <li>• Contractor provides competent technical</li> </ul>	Random review by COR (no less than

	requirements addressed in PWS Section 5.	expertise and analysis support that is consistent with the quality levels specified in the PWS. <ul style="list-style-type: none"> <li>• Deliverables are factual, well-written, and 95% free of grammatical errors or misspellings.</li> <li>• 100% of deliverables are accomplished by the identified due dates/times and in accordance with applicable guidance.</li> </ul>	quarterly/Government personnel feedback
Service Contract Reporting	The Government will review the Contractor's reported information for reasonableness and consistency with contract information in accordance with section 6.10.	<ul style="list-style-type: none"> <li>• 95% reporting.</li> </ul>	Random review by COR
Trip Reports	Contractor provides accurate and timely reports in accordance with Section 6.1. Due within 10 business days of trip end date.	<ul style="list-style-type: none"> <li>• 95% reporting.</li> </ul>	COR/Government personnel feedback

The Contractor shall be directly responsible for ensuring the accuracy, quality, timeliness, and completion of all requirements under this PWS. The Contractor shall establish clear organizational lines of authority and responsibility to ensure effective management of the resources assigned to this requirement. The Contractor must maintain continuity between the support operations at the Government's on-site location and the Contractor's corporate offices.

## 8.2 Quality Control (QC)

The Contractor shall institute a complete QC Program to ensure that the requirements of this TO are fulfilled as specified. At a minimum, the Contractor shall include the following elements in the program:

- A comprehensive inspection system of all scheduled and unscheduled services required in this document.
- Name and contact information of designated QC Inspector and backup performing inspections.
- A proactive methodology to identify and correct problems before the Government identifies these problems. Contractor shall notify the Government of any problems.
- An organized, current file of all Contractor conducted inspections, corrective actions taken, and follow-up inspections.
- How projects will be managed to minimize layers of management and oversight, while still providing for accountability.
- How orders will be managed to provide clear communications between the Contractor, COR, and CO.

## 8.3 OCI

Organizational Conflict of Interest/ Personal Conflict of Interest: Contractor and Subcontractor personnel performing work under this contract may receive, have access to or participate in the development of proprietary or source selection information (e.g., cost or pricing information, budget information or analyses, specifications or work statements, etc.) or perform evaluation services which may create a current or subsequent Organizational Conflict of Interest (OCI) as defined in FAR Subpart 9.5 as well as personal conflicts of interest. Using the Contractor OCI/ PCOI Disclosure Form, the Contractor shall notify the Contracting Officer immediately whenever it becomes aware that such access or participation may result in any actual or potential conflict and shall promptly submit the conflict of interest disclosure form to the contracting officer to avoid or mitigate any such conflict. The contractor's mitigation plan will be reviewed and accepted/rejected solely at the discretion of the government, and in the event the government unilaterally determines that any such conflict cannot be satisfactorily avoided or

mitigated, the contracting officer may affect other remedies as he or she deems necessary, including prohibiting the contractor from participation in subsequent contracted requirements which may be affected by the conflict. In addition, contractors shall conduct internal reviews as necessary to identify financial interests and determine if any personal conflicts of interest exist or may arise. The contractor shall ensure that the organization has analyzed each financial disclosure to determine whether actual or potential conflicts exist. Information should be gathered and analyzed for all governing body members (e.g., board of directors, trustees, etc.) and principals of the organization as defined by FAR 52.203-13 and for each manager and key personnel who would be, or are involved with the performance of the contract.

All contractor and subcontractor employees supporting this contract shall sign the WHS AD non-disclosure agreements.

## **9.0 APPLICABLE PUBLICATIONS (CURRENT EDITIONS)**

### **9.1 Applicable Publications**

The Contractor must abide by all applicable regulations, publications, manuals, and local policies and procedures including the following:

- DoD Instruction 1025.09, "Science, Mathematics, and Research for Transformation (SMART) Defense Education Program"
- DoD Instruction 1025.11, "DoD Science, Technology, Engineering, and Mathematics (STEM) Education Programs and Activities"
- DoD Instruction 3200.20, "Scientific and Engineering Integrity"
- DoD Instruction 3201.01, "Management of DoD Research and Development (R&D) Laboratories"
- DoD Instruction 3201.05, "Management of Science and Technology Reinvention Laboratory Personnel Demonstration Projects"
- DoD Instruction 3210.01, "Administration and Support of Basic Research by the Department of Defense"
- DoD Instruction 3210.07, "Research Integrity and Misconduct"
- DoD Instruction 3216.01, "Use of Animals in DoD Conducted and Supported Research and Training"
- DoD Instruction 3216.02, "Protection of Human Subjects and Adherence to Ethical Standards in DoD-Conducted and -Supported Research"
- DoD Instruction 3218.02, "National Defense Science and Engineering Graduate (NDSEG) Fellowships"
- DoD Instruction 5000.02, "Operation of the Adaptive Acquisition Framework"
- DoD Instruction 5000.77, "DoD Federally Funded Research and Development Center (FFRDC) Program"
- DoD Instruction 5000.88, "Engineering of Defense Systems"
- DoD Instruction 5000.89, "Test and Evaluation"
- DoD Instruction 5000.93, "Use of Additive Manufacturing in the DoD"
- DoD Instruction 5137.02, "Under Secretary of Defense for Research and Engineering (USD(R&E))"
- DoD Instruction 5200.48, "Controlled Unclassified Information" and DFARS Clause 252.204-7012, "Safeguarding Covered Defense Information and Cyber Incident Reporting"
- DoD Instruction 5535.08, "DoD Domestic Technology Transfer Program"
- DoD Manual 5110.04, Volume 1 "Manual for Written Material: Correspondence Management" and Volume 2 "Manual for Written Material: Examples and Reference Material"
- DoD Manual 5200.01, "DoD Information Security Program," Volume 1 "Overview, Classification, and Declassification," Volume 2 "Marking of Information," and Volume 3 "Protection of Classified Information"
- IEEE 15288.2 – IEEE Standard for Technical Reviews and Audits on Defense Programs
- OSD/DDR&E, Advanced Capabilities website: <https://ac.cto.mil/itra/>
- WHS Correspondence Management Division website: <https://www.esd.whs.mil/CMD/CATMS/>

## **10.0 PERFORMANCE LOCATIONS AND HOURS**

### **10.1 Period of Performance**



This TO will have a one-year (12 months) base period of performance, which may include a one-month transition period, and four one-year (12 month) option periods.

### **10.2 Place(s) of Performance**

The Contractor will perform the majority of the support within the metropolitan Washington, DC area but may include other Continental United States (CONUS) and Outside the CONUS (OCONUS) locations as required by specific technical requirements. The Contractor shall provide and maintain a facility located in the National Capitol Region (NCR) in proximity of the Pentagon and/or Mark Center. The Government may require daily or persistent presence of person(s) within the Mark Center or Pentagon spaces to facilitate interaction with government customers and stakeholders. Refer to Technical Exhibit 02, PWS section 10.5.2 for Government and Contractor site. The Government will either provide a dedicated desk or hot-desk access in a Government facility, or authorize unclassified telework.

The Contractor shall help identify and/or coordinate conference space for meetings (Classified/Unclassified) by the PWS. Conference rooms shall be metro and/or DoD Bus accessible within the NCR. All conference rooms shall have the capability for computer projected presentations and be equipped with high speed internet ports. Conference rooms are needed to accommodate up to one hundred (100) participants. The Contractor shall support the Government in obtaining the necessary internal DoD approval to schedule conference rooms.

For Contractor personnel performing Tasks 1-9 discussed in Section 5, the Government will either provide a dedicated desk or hot-desk access in a Government facility; or authorize telework. For classified work, the Government will provide a dedicated desk or hot-desk access in a Government facility. Dedicated or hot-desk facilities will be located in the Pentagon or the Mark Center in Alexandria, VA. For this PWS, the Government does not envision that the Contractor will need to receive, process, or store classified material at their facility.

For Contractor personnel on the Optional Surge CLIN (Task 10 discussed in Section 5.1.10), the Contractor may be required to provide facilities up to the Secret level needed to accomplish the task independent of Government facilities including desk space, telephones, computers, and other items necessary to maintain an office environment. Facility requirements for Surge efforts will be specified at the time a surge effort is defined.

### **10.3 Hours of Operation**

The Contractor is responsible for conducting TO support for a standard 40-hour work week, between the hours of 7:00am to 6:00pm Monday thru Friday, except Federal holidays. When the Government facility is closed due to local or national emergencies, administrative closings, or similar Government-directed facility closings, Contractor personnel may be required to telework with COR authorization. The Contractor shall at all times maintain an adequate work force for the uninterrupted performance of all tasks defined within this PWS when the Government facility is not closed for the above reasons.

### **10.4 Observance of Legal Holidays and Facility Closures**

The Contractor may be required or authorized to work when their assigned facility is on holiday or closed. The following is a list of U.S. Federal holidays and reasons for facility closures:

New Year's Day	January 1 <sup>st</sup>
Birthday of Martin Luther King	Third Monday in January
President's Day	Third Monday in February
Memorial Day	Final Monday in May
Juneteenth National Independence Day	June 19 <sup>th</sup>
Independence Day	July 4 <sup>th</sup>
Labor Day	First Monday in September
Columbus Day	Second Monday in October
Veteran's Day	November 11 <sup>th</sup>
Thanksgiving Day	Fourth Thursday in November
Christmas Day	December 25 <sup>th</sup>

If a holiday falls on a Saturday, the holiday is observed on the preceding Friday. If a holiday falls on a Sunday, the holiday is observed on the following Monday. Any other day/time designated by Federal statute, Executive Order, or

Presidential Proclamation, adverse weather conditions or national emergencies may require Government facilities to close.

## 10.5 Technical Exhibits

**10.5.1** Technical Exhibit 1 – Labor Categories

**10.5.2** Technical Exhibit 2 – Historical Workload Data

### 10.5.1 TECHNICAL EXHIBIT 1 LABOR CATEGORIES

Labor Category	Minimum Experience	Description & Required Skills	Education
<b>Program Manager</b>	Ten (10) years' recent and relevant experience.	<p><b>Description:</b> The Program Manager (PM) provides management and oversight of contractor personnel. The PM provides management, direction, administration, quality assurance, and leadership of the execution of this TO.</p> <p><b>Required:</b> The PM shall have proficient business/programmatic skills, technical knowledge, and the ability to achieve mission objectives quickly and efficiently. The PM shall have the ability to maintain records and provide overall charges by office and by each individual for any and all costs associated with those efforts for the execution of this PWS.</p>	Masters' degree from an accredited college or university is required. At the discretion of the Government, degree requirement waived in lieu of a Bachelor's degree along with ten (10) years recent and relevant work experience working in DoD financial activities.
<b>Financial Manager</b>	Ten (10) years' recent and relevant experience.	<p><b>Description:</b> The FM shall support financial and budget management of all DCTO(S&amp;T) programs and financial analysts. The FM shall support all phases of the PPBE process and meet all OSD mandated timelines for submission of PPBE related documents. The Contractor shall support all PPBE activities related to the execution of the DCTO(S&amp;T) programs and other office support activities.</p> <p><b>Required:</b> The FM shall have experience of funding disbursement processes and the DoD PPBE process. The FM shall have experience with DoD acquisition/budget processes and procedures. The FM shall have experience of DoD organization and structure, particularly research and development structure of the Services and Combatant Commands.</p>	Bachelor's degree from an accredited college or university is required. At the discretion of the Government, specialized experience may be substituted in lieu of specific educational requirements.
<b>Financial Management/ Budget Execution Support</b>	Five (5) years' recent and relevant experience.	<p><b>Description:</b> The Contractor shall support program and budget formulation and execution of the DCTO(S&amp;T) programs. The Contractor shall support all phases of the PPBE process and meeting all OSD mandated timelines for submission of PPBE related documents. The Contractor shall support all PPBE activities related to the execution of the DCTO(S&amp;T) programs and other office support activities.</p> <p><b>Required:</b> The Contractor shall have experience of funding disbursement processes and the DoD PPBE process. The Analyst shall be familiar with DoD acquisition/budget processes and procedures. The Contractor shall have</p>	Bachelor's degree from an accredited college or university is required. Bachelor's degree in business management, finance, or accounting is preferred. At the discretion of the Government, specialized experience may be substituted in lieu of specific educational requirements.

		knowledge of DoD organization and structure, particularly research and development structure of the Services and Combatant Commands.	
<b>Specialized Support – Technology Web</b>	Five (5) years' recent and relevant experience.	<p><b>Description:</b> The Contractor shall provide graphics, multimedia, and/or web support for the DCTO(S&amp;T). The Government encourages maximum use of OSD graphics and Defense Logistics Agency (DLA) services. The Analyst shall provide the services described in Subtask 2.3 of the PWS.</p> <p><b>Required:</b> The Contractor shall have knowledge in all areas of graphic design and computer based animation; have experience in computer based graphics efforts in support of DoD or equivalent government organization (e.g., Department of Homeland Security); and experience in communications/public affairs in DoD or equivalent government organization.</p>	Bachelor's degree from an accredited college or university in information technology, web design, or graphic design is required. At the discretion of the Government, specialized experience may be substituted in lieu of specific educational requirements.
<b>Technical Integration Program Analyst</b>	Five (5) years' recent and relevant experience.	<p><b>Description:</b> The Contractor should be a subject matter expert in supported program (EW&amp;C, Spectrum, Advanced Sensors, C2, PNT, Software/Embedded systems, Autonomy, Advanced Computing, Data Analytics, Communications/Networks, Cybersecurity and Operations, or NC3) and related technologies. The Contractor analyzes system solutions to complex and challenging DoD problems.</p> <p><b>Required:</b> The Contractor shall be proficient in technical research and experienced in electronic warfare and countermeasures, including relevant related technology disciplines such as radiofrequency and optical sensors and communications, cyber, autonomy, modeling and simulation and decision support analytics/visualization. The Contractor shall have in-depth knowledge of the PPBE process and proficient communication skills, unstructured verbal interactions, briefings, and meeting moderation; and ability to work independently with both junior and senior staff in a distributed environment while maintaining a strong commitment to deliverable scheduled.</p>	Bachelor's degree from an accredited college or university is required. At the discretion of the Government, specialized experience may be substituted in lieu of specific educational requirements.
<b>Technical Integration Senior Program Analyst</b>	Ten (10) years' recent and relevant experience of which at least five (5) years is in program/project management or oversight of DoD S&T and Research, Development and Acquisition (RD&A) efforts at the Headquarters level or equivalent.	<p><b>Description:</b> The Contractor should be a subject matter expert in supported program (EW&amp;C, Spectrum, Advanced Sensors, C2, PNT, Software/Embedded systems, Autonomy, Advanced Computing, Data Analytics, Communications/Networks, Cybersecurity and Operations, or NC3) and related technologies.</p> <p><b>Required:</b> The Contractor shall be proficient in technical research and an in-depth knowledge of electronic warfare and countermeasures, including relevant related technology disciplines such as radiofrequency and optical sensors and communications, cyber, autonomy, modeling and simulation and decision support analytics/visualization. The Analyst shall have in-depth knowledge of the PPBE process and proficient communication skills, unstructured verbal interactions, briefings, and meeting moderation; and ability to work independently with both junior and senior staff in a distributed environment while maintaining a strong commitment to deliverable scheduled.</p>	Bachelor's degree from an accredited college or university is required. At the discretion of the Government, specialized experience may be substituted in lieu of specific educational requirements.

<b>Technical Integration Technical Expert</b>	Fifteen (15) years' recent and relevant work experience in program/project management. Ten (10) years recent and relevant work experience in supporting S&T program management in DoD and knowledge of Defense S&T activities, organizations, and planning processes.	<p><b>Description:</b> The Contractor shall be a subject matter expert in supported program (EW&amp;C, Spectrum, Advanced Sensors, C2, PNT, Software/Embedded systems, Autonomy, Advanced Computing, Data Analytics, Communications/Networks, Cybersecurity and Operations, or NC3) and related technologies.</p> <p><b>Required:</b> The Contractor shall be proficient in technical research and an in-depth knowledge of electronic warfare and countermeasures, including relevant related technology disciplines such as radiofrequency and optical sensors and communications, cyber, autonomy, modeling and simulation and decision support analytics/visualization. In-depth knowledge of the PPBE process. Proficient communication skills, unstructured verbal interactions, briefings, and meeting moderation; and ability to work independently with both junior and senior staff in a distributed environment while maintaining a strong commitment to deliverable scheduled.</p> <p><b>Preferred:</b> Candidates with proficient DoD occupational mission experience in the COI of support.</p>	Ph.D. or equivalent doctorate degree is preferred from an accredited college or university in the relevant Reliance 21 COI of their assignment (e.g. for Cyber: computer science, computer engineering, software engineering; for EW: physics, electrical engineering; Quantum: Physics, quantum science, mathematics).
<b>Business and Operations Management Support Program Analyst</b>	Five (5) years' recent and relevant experience.	<p><b>Description:</b> The Contractor shall review program plans and other related documents and provide comments to identify and mitigate risks to accomplish DCTO(S&amp;T) project goals. The Contractor shall provide recommendations for improvement of effectiveness and efficiency of the DCTO(S&amp;T) business processes.</p> <p><b>Required:</b> The Contractor shall have proficient oral and written communication skills, and above-average skills in MS Word, PowerPoint, and Excel applications. The Contractor shall have demonstrated success in the conception and execution of new projects (i.e. no pre-existing business processes), and without detailed guidance from the client, and often within very short deadlines.</p>	Bachelor's degree from an accredited college or university in a technical field or business is required. Master's degree in Business Administration (MBA), a graduate degree in science, technology, engineering, mathematics, or other related field is also preferred. At the discretion of the Government, specialized experience may be substituted in lieu of specific educational requirements.
<b>Administrative Support Specialist</b>	Five (5) years' recent and relevant work experience. .	<p><b>Description:</b> The Contractor provides senior-level clerical and administrative support for DCTO(S&amp;T) senior executives and action officers while supporting the areas defined in Subtask 3.2 of the PWS.</p> <p><b>Required:</b> The Contractor shall have proficient written and oral communication skills and ability to coordinate across large groups of people at multiple levels. The Contractor shall have experience working with senior officials and familiar with DoD organization(s) and structure, specifically OSD.</p>	Bachelor's degree from an accredited college or university is required. At the discretion of the Government, specialized experience may be substituted in lieu of specific educational requirements.
<b>Reliance 21 Roadmap Technical Expert</b>	Fifteen (15) years' recent and relevant work experience in program/project management. Ten (10) years recent	<b>Description:</b> The Contractor shall articulate the capabilities, accomplishments, and investment of S&T from a global perspective and ecosystem. In addition, identify and bridge technology gaps and provide recommendations and options, considering the entire S&T development life cycle.	Ph.D. or equivalent doctorate degree is preferred from an accredited college or university in the relevant Reliance 21 COI of their



	and relevant work experience in supporting S&T program management in DoD and knowledge of Defense S&T activities, organizations, and planning processes.	<p><b>Required:</b> The Contractor shall possess broad knowledge and expertise in support of science and technology (S&amp;T) roadmap maintenance, update and evaluation. The Contractor shall have experience in program/project management or DoD S&amp;T oversight and roadmap development, at the Headquarters level or equivalent. The Contractor should be a subject matter expert in COI technical areas. The Contractor shall have in-depth knowledge of the PPBE process. Work experience in positions requiring proficient oral and written communication skills, and proficient skills in MS Word, PowerPoint, and Excel applications. Demonstrated success in the conception and execution of new projects (i.e. no pre-existing business processes), and without detailed guidance from the client, and often within very short deadlines.</p> <p><b>Preferred:</b> Candidates with proficient DoD occupational mission experience in the COI of support.</p>	assignment (e.g. for Cyber: computer science, computer engineering, software engineering; for EW: physics, electrical engineering; Quantum: Physics, quantum science, mathematics).
<b>BRO Support Senior Program Analyst</b>	Ten (10) years' recent and relevant experience.	<p><b>Description:</b> The Contractor shall maintain up-to-date and ongoing broad situational awareness of research and development efforts involving the BRO, including policies in the Department and/or federal Government which impact the execution of the Department's basic research portfolio.</p> <p><b>Required:</b> The Contractor shall have DoD experience and in-depth knowledge of the DoDGARs, the DoD Research Integrity and Misconduct Instruction, and associated government wide statutes, Executive Orders (EOs), Office of Management Budget (OMB) Circulars, and other policies.</p>	Bachelor's degree from an accredited college or university is required. A Bachelor's degree in science, technology, engineering, mathematics, or other related field, is preferred.
<b>BRO Support Program Analyst</b>	Five (5) years' recent and relevant experience.	<p><b>Description:</b> The Contractor shall assist the Director for Basic Research in resource accounting and developing unfinanced requirement issue papers and other programmatic documentations.</p> <p><b>Required:</b> The Contractor shall have proficient communication skills, unstructured verbal interactions, briefings, and meeting moderation; and ability to work independently with both junior and senior staff in a distributed environment while maintaining a strong commitment to deliverable scheduled. Demonstrated success in the conception and execution of new projects (i.e., no pre-existing business processes), and without detailed guidance from the client.</p>	Bachelor's degree from an accredited college or university is required. At the discretion of the Government, specialized experience may be substituted in lieu of specific educational requirements.
<b>HBCU Senior Program Analyst</b>	Ten (ten) years' recent and relevant experience.	<p><b>Description:</b> The Contractor shall assist in implementation of the OSD Historically Black Colleges and Universities Minority-Serving Institutions (HBCU/MI) program and oversight of DoD Component activities related to HBCU/MI.</p> <p><b>Required:</b> The Contractor shall have demonstrated Project management positions supporting the DoD science and technology enterprise. Experience working with basic research and RDT&amp;E programs and the academic community including HBCU/MIs. Demonstrated experience in Budget development and execution. Demonstrated experience working with S&amp;T and HBCU/MI program stakeholders including the Administration, Congress, Industry, and</p>	Bachelor's degree from an accredited college or university is required. A Bachelor's degree in science, technology, engineering, mathematics, or other related field, is preferred.

		Academia work experience in positions requiring proficient oral and written communication skills, MS Word, PowerPoint, and Excel applications. Demonstrated success in the conception and execution of new projects (i.e., no pre-existing business processes), without detailed guidance from the client, and often within very short deadlines.	
<b>STEM Development Office Support Senior Program Analyst</b>	Ten (10) years' recent and relevant experience.	<p><b>Description:</b> The Contractor shall support the development, management, evaluation, and analysis of DoD STEM activities (education, outreach and workforce development initiatives) to ensure that the Department's collective effort anticipates and responds to DoD STEM workforce needs.</p> <p><b>Required:</b> The Contractor shall have demonstrated program management; experience in leading/supporting STEM education, outreach, and workforce development programs or other S&amp;T program management. Knowledge of STEM education and workforce development programs from a local and national context, relative to development, execution, and evaluation. Demonstrated knowledge of program and budget analysis and experience in strategic communications.</p> <p><b>Preferred:</b> Experience in comprehensive evaluations, to include development/review of Institutional Review Board and PRA Paper Reduction Act (IRB/PRA) packets</p>	Bachelor's degree from an accredited college or university is required. A Bachelor's or advanced degree in science, technology, engineering, mathematics, or other related field, is preferred. At the discretion of the Government, specialized experience may be substituted in lieu of specific educational requirements.
<b>DoD Laboratories Office Program Analyst</b>	Five (5) years' recent and relevant work experience.	<p><b>Description:</b> The Contractor shall identify the Department of Defense core technical competencies (CTC) and assess the support of the CTCs by the DoD's laboratories. The Contractor shall survey recognized world class laboratories within industry, academia and other government agencies to develop recommendations for improvements within the existing defense laboratory system.</p> <p><b>Required:</b> The Contractor shall have demonstrated progressive responsibility in project management positions supporting the DoD science and technology enterprise. Work experience in positions requiring proficient oral and written communication skills, and proficient skills in MS Word, PowerPoint, and Excel applications. Demonstrated success in the conception and execution of new projects (i.e., no pre-existing business processes), and without detailed guidance from the client, and often within very short deadlines.</p>	Bachelor's degree from an accredited college or university is required. A Bachelor's degree in science, technology, engineering, mathematics, other relevant field is preferred.
<b>Lab Day Support Senior Program Analyst</b>	Ten (10) years' recent and relevant experience.	<p><b>Description:</b> The Contractor shall develop and maintain a project plan of action and the milestones for each Lab Day. The Contractor shall assist the government lead with the call for nominations, identification and selection of exhibitors. This will include the organization of logistics support requirements for selected exhibitors.</p> <p><b>Required:</b> The Contractor shall have demonstrated progressive responsibility in project management positions supporting the DoD Laboratory enterprise. Work experience in positions requiring proficient oral and written communication skills.</p>	A Bachelor's degree from an accredited college or university is required. A Bachelor's degree in science, technology, engineering, mathematics, other relevant field is preferred. At the discretion of the Government, specialized experience may be substituted in lieu of specific educational requirements.

		<b>Preferred:</b> Demonstrated success in the conception and execution of DoD sponsored events and/or exhibitions.	
<b>Infrastructure Senior Program Analyst</b>	Ten (10) years' recent and relevant experience.	<p><b>Description:</b> The Contractor shall gather data and provide administrative support of all INF activities from creation, development, coordination, management, analysis, evaluation, implementing, sustainment, changing to updating.</p> <p><b>Required:</b> The Contractor shall have demonstrated experience in program management; experience in supporting INF/military construction programs or other S&amp;T program management; knowledge of INF policy, authorities, laws and regulations from lab and national context, relative to development, execution, and evaluation. Demonstrated knowledge of INF program and budget analysis; (experience in strategic communications; experience in comprehensive evaluations, to include development/review of Award/Funding Opportunities packets. Proficient skills in oral and written communication, MS Word, PowerPoint, SharePoint, MS Teams, Access, Excel applications. Demonstrated success in the conception and execution of new projects (i.e., no preexisting business processes), and without detailed guidance from the client.</p>	Bachelor's degree in science, technology, engineering, mathematics, or other related field, from an accredited college or university is required. At the discretion of the Government, specialized experience may be substituted in lieu of specific educational requirements.
<b>Infrastructure Program Analyst</b>	Five (5) years' recent and relevant experience.	<p><b>Description:</b> The Contractor shall gather data and provide administrative support of all INF activities from creation, development, coordination, management, analysis, evaluation, implementing, sustainment, changing to updating.</p> <p><b>Required:</b> The Contractor shall have demonstrated experience in program management; experience in supporting Infrastructure INF/military construction programs or other S&amp;T program management; knowledge of INF policy, authorities, laws and regulations from lab and national context, relative to development, execution, and evaluation. Demonstrated knowledge of INF program and budget analysis; (experience in strategic communications; experience in comprehensive evaluations, to include development/review of Award/Funding Opportunities packets. Proficient skills in oral and written communication, MS Word, PowerPoint, SharePoint, MS Teams, Access, Excel applications. Demonstrated success in the conception and execution of new projects (i.e., no preexisting business processes), and without detailed guidance from the client.</p>	Bachelor's degree in science, technology, engineering, mathematics, or other related field. At the discretion of the Government, specialized experience may be substituted in lieu of specific educational requirements.
<b>Defense Laboratory &amp; Personnel Office Data Analyst</b>	Five (5) years' recent and relevant experience.	<p><b>Description:</b> The Contractor shall conduct and collect various types of data on the performance of laboratory personnel systems, STEM outreach programs, technology transfer, infrastructure and federally funded research and development centers (FFRDCs). The goal of the data collections and databases is to assess the effectiveness and deficiencies on the various programs executing authorities and flexibilities authorized by Congressional language and inform leadership on the status of programs.</p> <p><b>Required:</b> The Contractor shall have demonstrated experience in data management, database management, statistics, or data analysis. Demonstrated progressive responsibility in project management positions supporting the</p>	Bachelor's degree from an accredited college or university is required.

		DoD Laboratory enterprise. Work experience in positions requiring proficient oral and written communication skills.	
<b>Defense Laboratory &amp; Personnel Office Technical Expert</b>	Fifteen (15) years' recent and relevant work experience in program/project management. Ten (10) years recent and relevant work experience in supporting S&T program management in DoD and knowledge of Defense S&T activities.	<p><b>Description:</b> The Contractor shall support periodic assessment of ongoing technical efforts provided by the FFRDC, and make recommendations for improvements where necessary.</p> <p><b>Required:</b> The Contractor shall have demonstrated experience providing strategic technical oversight of projects. Demonstrated progressive responsibility in technical project management positions. Work experience in positions requiring proficient oral and written communication skills, and above-average skills in MS Word, PowerPoint, and Excel applications. Demonstrated success in the conception and execution of highly complex and technical detailed projects (with minimal guidance from the client, and often within very short deadlines.</p>	Master's degree from an accredited college or university is required. Master's Degree in Statistics, Computer Science, Data Management, Database Structures, or other relevant field is preferred. At the discretion of the Government, specialized experience may be substituted in lieu of specific educational requirements.
<b>Defense Laboratory Directorate Program Analyst</b>	Five (5) years' recent and relevant experience.	<p><b>Description:</b> The Contractor shall provide technical advice and input for management oversight, drafting policy guidance, and coordinating budget and Congressional Special Interest Items.</p> <p><b>Required:</b> The Contractor shall be proficient in technical research, an in-depth knowledge of human performance, training, environmental sciences, biosystems, and technical writing. Proficient communication skills, unstructured verbal interactions, briefings, and meeting moderation; and ability to work independently with both junior and senior staff in a distributed environment while maintaining a strong commitment to deliverable scheduled.</p>	Bachelor's degree from an accredited college or university in medicine, biology, neuroscience, psychology, toxicology, engineering, mathematics, or other science and technology related subjects is required. At the discretion of the Government, specialized experience may be substituted in lieu of specific educational requirements.
<b>Tech Transfer Support Senior Program Analyst</b>	Ten (10) years' recent and relevant experience	<p><b>Description:</b> The Contractor shall provide support to the Director of Infrastructure and Technology Transfer, DoD Laboratories and Personnel Office, and Undersecretary of Defense Research and Engineering (USD (R&amp;E)) , to develop and provide policy guidance that supports cutting edge technologies and capabilities.</p> <p><b>Required:</b> The Contractor shall have demonstrated experience in program management; in supporting T2 programs or other S&amp;T program management. Knowledge of T2 policy, authorities, laws and regulations from lab and national context, relative to development, execution, and evaluation. Demonstrated knowledge of T2 program and budget analysis; experience in strategic communications; comprehensive evaluations, to include development/review of Award/Funding Opportunities packets. Proficient skills in oral and written communication, MS Word, PowerPoint, SharePoint, MS Teams, Access, Excel applications. Demonstrated success in the conception and execution of new projects (i.e., no preexisting business processes), and without detailed guidance from the client.</p>	Bachelor's degree in science, technology, engineering, mathematics, or other related field, from an accredited college or university is required. At the discretion of the Government, specialized experience may be substituted in lieu of specific educational requirements.
<b>Tech Transfer Support</b>	Five (5) years' recent and relevant experience.	<b>Description:</b> The Contractor shall provide support to the Director of Infrastructure and Technology Transfer, DoD Laboratories and Personnel Office, and Undersecretary of	Bachelor's degree in science, technology, engineering, mathematics,



<b>Program Analyst</b>		<p>Defense Research and Engineering (USD (R&amp;E)) , to develop and provide policy guidance that supports cutting edge technologies and capabilities.</p> <p><b>Required:</b> The Contractor shall have demonstrated experience in program management; in supporting T2 programs or other S&amp;T program management. Knowledge of T2 policy, authorities, laws and regulations from lab and national context, relative to development, execution, and evaluation. Demonstrated knowledge of T2 program and budget analysis; experience in strategic communications; comprehensive evaluations, to include development/review of Award/Funding Opportunities packets. Proficient skills in oral and written communication, MS Word, PowerPoint, SharePoint, MS Teams, Access, Excel applications. Demonstrated success in the conception and execution of new projects (i.e., no preexisting business processes), and without detailed guidance from the client.</p>	or other related field. At the discretion of the Government, specialized experience may be substituted in lieu of specific educational requirements.
<b>Emerging Technologies Support Program Analyst</b>	Five (5) years' recent and relevant experience.	<p><b>Description:</b> The Contractor shall assist in the development of and recommend adjustments to the DoD's science and technology strategies for ET areas through research and direct interface with the Department of Energy (DOE), OSD Staff, Joint Staff, Defense Agencies, Services, Other Government agencies, industry and academia. Provide management and integration support to assist in the development of and recommend adjustments to the DoD's Science and Technology (S&amp;T) Investment Strategy as it applies to ET.</p> <p><b>Required:</b> The Contractor shall have relevant experience providing strategic technical oversight of projects. Demonstrated progressive responsibility in technical project management positions. Work experience in positions requiring proficient oral and written communication skills, and proficient skills in MS Word, PowerPoint, and Excel applications. Demonstrated success in the conception and execution of highly complex and technical detailed projects (with minimal guidance from the client, and often within very short deadlines.</p>	Bachelor's degree from an accredited college or university is required. A Bachelor's degree in scientific, technical, business management, or other related discipline is preferred. At the discretion of the Government, specialized experience may be substituted in lieu of specific educational requirements.
<b>Emerging Technologies Support Senior Program Analyst</b>	Ten (10) years' recent and relevant experience providing strategic technical oversight of projects.	<p><b>Description:</b> The Contractor shall assist in the development of and recommend adjustments to the DoD's science and technology strategies for ET areas through research and direct interface with the Department of Energy (DOE), OSD Staff, Joint Staff, Defense Agencies, Services, Other Government agencies, industry and academia. Provide management and integration support to assist in the development of and recommend adjustments to the DoD's Science and Technology (S&amp;T) Investment Strategy as it applies to ET.</p> <p><b>Required:</b> The Contractor shall be proficient in technical research, an in-depth knowledge of human performance, training, environmental sciences, biosystems, and technical writing. Proficient communication skills, unstructured verbal interactions, briefings, and meeting moderation; and ability to work independently with both junior and senior staff in a</p>	Bachelor's degree in scientific, technical, business management, or other related discipline is preferred. At the discretion of the Government, specialized experience may be substituted in lieu of specific educational requirements.

		distributed environment while maintaining a strong commitment to deliverable scheduled.	
<b>Emerging Technologies Support Technical Expert</b>	Fifteen (15) years' recent and relevant experience providing strategic technical oversight of projects.	<p><b>Description:</b> The Contractor shall assist in the development of and recommend adjustments to the DoD's science and technology strategies for ET areas through research and direct interface with the Department of Energy (DOE), OSD Staff, Joint Staff, Defense Agencies, Services, Other Government agencies, industry and academia.</p> <p><b>Required:</b> The Contractor shall have demonstrated experience providing strategic technical oversight of projects. Demonstrated progressive responsibility in technical project management positions. Work experience in positions requiring proficient oral and written communication skills, and above-average skills in MS Word, PowerPoint, and Excel applications. Demonstrated success in the conception and execution of highly complex and technical detailed projects (with minimal guidance from the client, and often within very short deadlines.</p>	Master's degree from an accredited college or university is required. A PhD degree in science, technology, engineering, mathematics, or other relevant field is preferred. At the discretion of the Government, specialized experience may be substituted in lieu of specific educational requirements.
<b>TIIB Support Program Analyst</b>	Five (5) years' recent and relevant experience.	<p><b>Description:</b> The Contractor shall review program plans and other related documents and provide comments to identify and mitigate risks to the accomplishment of the TIIB projects and goals. The Analysts shall track progress and suggest alternate approaches for projects behind schedule and make recommendations for improvement of effectiveness and efficiency of the TIIB business processes.</p> <p><b>Required:</b> The Contractor shall have demonstrated program management; experience in leading/supporting STEM education, outreach, and workforce development programs or other S&amp;T program management. Knowledge of STEM education and workforce development programs from a local and national context, relative to development, execution, and evaluation. Demonstrated knowledge of program and budget analysis and experience in strategic communications.</p> <p><b>Preferred:</b> Experience in comprehensive evaluations, to include development/review of Institutional Review Board and PRA Paper Reduction Act (IRB/PRA) packets.</p>	Bachelor's degree from an accredited college or university is required. A Bachelor's or advanced degree in science, technology, engineering, mathematics, or other related field, is preferred. At the discretion of the Government, specialized experience may be substituted in lieu of specific educational requirements.
<b>Futures Support Program Analyst</b>	Five (5) years' recent and relevant experience.	<p><b>Description:</b> The Contractor shall assist in developing the portfolio management process to assess and update the portfolio investment strategy for the Program Objective Memorandum (POM) budgeting cycle. This includes development of a uniform DoD-wide process to assess the current progress for each subarea of the medical RDT&amp;E portfolio; development of roadmaps of technology and regulatory development for subareas of the portfolio; and development of metrics for assessing progress, collaboration, adequacy of resources, and research coverage of capability gaps across the DoD.</p> <p><b>Required:</b> The Contractor shall be proficient in technical research, an in-depth knowledge of human performance, training, environmental sciences, biosystems, and technical writing. Proficient communication skills, unstructured verbal interactions, briefings, and meeting moderation; and ability</p>	Bachelor's degree from an accredited college or university in medicine, biology, neuroscience, psychology, toxicology, engineering, mathematics, or other science and technology related subjects is required. At the discretion of the Government, specialized experience may be substituted in lieu of specific educational requirements.

	to work independently with both junior and senior staff in a distributed environment while maintaining a strong commitment to deliverable scheduled.	
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**10.5.2 TECHNICAL EXHIBIT 2**  
**HISTORICAL WORKLOAD DATA**

Task/Subtask	Labor Category	FTEs	Hours	Location
Task 1	Senior Program Manager	1	1,920	*Contractor Site
Subtask 2.1	Senior Financial Analyst	1	1,920	*Government Site
Subtask 2.2	Financial Analyst	8	15,360	*Government Site
Subtask 2.3	Specialized Support – IT/Web Program Analyst	1	1,920	*Government Site
Subtask 2.4	Technical Integration Program Analyst	1	1,920	*Government Site
Subtask 2.4	Technical Integration Senior Program Analyst	2.5	4,800	*Government Site
Subtask 2.4	Technical Integration Technical Expert	1	1,920	*Government Site
Subtask 3.1	Business and Operation Management Support Program Analyst	12.5	24,000	*Government Site
Subtask 3.2	Administrative Support Specialist	1	1,920	*Government Site
<b>Task 4</b>	Reliance 21 Roadmap Support Technical Expert	6.75	12,960	*Government Site
Subtask 5.1	BRO Support Senior Program Analyst	4	7,680	*Government Site
Subtask 5.1	BRO Support Program Analyst	3.5	6,720	*Government Site
Subtask 6.1	HBCU Senior Program Analyst	2	3,840	*Government Site
Subtask 6.2	STEM Development Office Support Senior Program Analyst	6	11,520	*Government Site
Subtask 7.1	DoD Laboratories Office Program Analyst	3	5,760	*Government Site
Subtask 7.2	Lab Day Support Senior Program Analyst	.25	480	*Government Site
Subtask 8.1	Infrastructure Senior Program Analyst	1	1,920	*Government Site
Subtask 8.1	Infrastructure Program Analyst	1	1,920	*Government Site
Subtask 8.2	Defense Laboratory & Personnel Office Data Analyst	2	3,840	*Government Site
Subtask 8.3	Defense Laboratory & Personnel Office Technical Expert	1	1,920	*Government Site
Subtask 8.4	Defense Laboratory Directorate Program Analyst	5	9,600	*Government Site
Subtask 9.1	Tech Transfer Support Senior Program Analyst	1	1,920	*Government Site
Subtask 9.1	Tech Transfer Support Program Analyst	1	1,920	*Government Site
Subtask 9.2	Emerging Technologies Support Program Analyst	2	3,840	*Government Site
Subtask 9.2	Emerging Technologies Support Senior Program Analyst	4.5	8,640	*Government Site
Subtask 9.2	Emerging Technologies Support Technical Expert	1	1,920	*Government Site
Subtask 9.3	TIIB Support Program Analyst	1	1,920	*Government Site
Subtask 9.4	Futures Support Program Analyst	1	1,920	*Government Site

*\*or agreed upon remote work location.*

(End of Summary of Changes)