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PERFORMANCE WORK STATEMENT (PWS)

Strategic Planning and Implementation and Analytics Support

Office of Diversity Management and Equal Opportunity (ODMEO)

Under Secretary of Defense for Personnel and Readiness (USD(P&R))

Revised 25 Nov 13(Option #4)

1.0. General: This is a non-personal services firm-fixed-price contract to provide assistance in planning, coordination, implementation and execution of Diversity and other related Equal Opportunity (EO) programs for which the contractor shall be directly responsible for ensuring the accuracy, timeliness, and completion of all tasks under this effort, none of which are considered inherently Governmental functions as defined in FAR 2.101 or Subpart 7.5. In accordance with FAR 37.104, Personal Services are prohibited and will not be performed under this contract.

2.0. Description of Services: The Contractor shall provide all personnel, materials, supervision, and other items necessary to perform the duties as defined in this PWS, except for those items specified in Section 13.0 as Government-Furnished Property and Services. The Contractor shall perform to the standards in this performance work statement.

3.0 Background: The Office of Diversity Management and Equal Opportunity (ODMEO) is a policy office of the Under Secretary of Defense for Personnel and Readiness, responsible for the planning, coordination, implementation and execution of Diversity and other related Equal Opportunity (EO) programs. The mission is to develop policies and plans, issue guidance, conduct analyses, define strategic direction, and provide oversight, evaluation, and strategic messaging for DoD-wide diversity and equal employment opportunity programs and plans that impact all DoD military and civilian personnel.

The Department of Defense has established the 2012-2017 DoD Diversity Strategic Plan that aligns with the Military Diversity Leadership Commission Report (MLDC) dated 15 Mar 12 and Executive Order, 13583, "Government-wide Initiative to Promote Diversity," to address diversity efforts for the Federal workforce. The strategic plan includes three primary goals by which the Department will evaluate the success of diversity and inclusion programs across DoD:

- 1) Leadership commitment for an accountable and sustained diversity effort;
- 2) Employ an aligned strategic outreach effort to identify, attract, and recruit from a broad talent pool reflective of the nation we serve;
- 3) Develop, mentor, and retain top talent from across the Total Force.

4.0. Objectives: This is a firm fixed price contract to provide “bridge support” for the effective execution and implementation of Diversity and Inclusion programs and policies.

Included in this support is the implementation of the DoD Diversity and Inclusion Strategic Plan, which encompasses advising and supporting analytical strategies designed to evaluate barriers that impact diversity in underrepresented groups and assists in the development of diversity and equal opportunity issuances.

5.0 Scope: The ODMEO is responsible for the operational execution and program analysis of the DoD Diversity Strategic Plan, which will contain a myriad of responsibilities to shape and influence diversity management programs throughout DoD.

This Performance Work Statement (PWS) identifies the tasks required of the contractor. The objective of this PWS is to gain strategic support and guidance for assistance in ODMEO. The contract support shall lay the foundation for evaluating and assessing the barriers and trends impacting the department to identify, attract, shape and retain the most talented and diverse workforce.

6.0. Requirements: The contractor shall provide all labor and materials needed to support the ODMEO to the maximum extent practicable and permissible by law.

7.0. Core Tasks: The Contractor shall furnish the necessary personnel, material, services, and facilities to perform the tasks listed below:

Item 4001 Issuance Development and Monitoring

To support ODMEO in this next phase, in the Base Option Booz Allen will oversee six issuances through pre-coordination. These issuances include the four civil rights instructions that address discrimination on the basis of race, color, and national origin (volume 1), disability (volume 2), age (volume 3), and sex (volume 4), the civilian equal employment opportunity (EEO) instruction and the military equal opportunity (MEO) instruction. During this phase of the contract Booz Allen will advise AOs in navigating the adjudication process. This will be a transition phase, during which the ODMEO AOs will assume primary responsibility as an organization for overseeing the issuances process. Booz Allen will also support ODMEO in the development of a new Diversity Instruction including researching the relevant laws, statutes, and regulations and working with the AOs to determine the policy, responsibilities, procedures, etc. that may be included. For this bridge period, Booz Allen will provide similar work that will be mutually agreed upon with the government. The tables below delineate the anticipated deliverables for Option 4.

Item 4002—Analytics Support and Ad Hoc Reporting Development

For the EEO demographic reports, it is essential that the Components and other key DoD Office of the Secretary of Defense (OSD) stakeholders review and understand the appearance and functionality of the formatted data and the approach used to summarize information. This task allows for the project manager to change or augment the report as indicated by this review. It also allows for a stakeholder review of report content so that DoD entities are aware of this OSD capability and can begin to formulate the ability within their Components to analyze EEO demographics in a consistent manner. To support ODMEO in this next phase, in the Base Option, Booz Allen will develop analytical reports that provide the identification, collection, analysis, and presentation of diversity and EEO indicator data. ODMEO's analytical framework will support the Diversity and Inclusion Strategic Plan and Implementation guide, National Defense Authorization Act (NDAA), and diversity policies and instructions. Booz Allen will also support ODMEO in the development of Ad-

Hoc reports and analysis. Based on the purpose and audience, Booz Allen will use the previously collected data and analysis to develop reports that are tailored for each cause. For this bridge period, Booz Allen will provide similar work that will be mutually agreed upon with the government. The main focus will be upon supporting analytic requirements for annual reports to Congress and SECDEF. The tables below delineate the anticipated deliverables for Option 4.

Item 4003 —Accountability Framework Implementation

Booz Allen's recommended accountability approach involves the development of a framework that will allow specific actions for implementation. The draft framework will be refined by the ODMEIO staff and introduced to various stakeholder groups to support DoD's efforts to institute engagement in the Diversity and Inclusion programs as a strong guideline for expected organizational behavior and support. This framework will also ensure that programs and initiatives take hold in the organization as enduring activities rather than one time initiatives. Booz Allen has already developed a draft framework that is composed of three areas: (1) Alignment, (2) Compliance and (3) Assessment. The component content includes:

- 1 **Alignment:** This phase of the accountability structure ensures that the right resources and constituency groups are engaged in the accountability framework's execution. The alignment components include stakeholder engagement and coalition and resource alignment. The alignment component provides a specific action roadmap for stakeholders. It ensures practitioner forums have EEOD and share best practices. It creates a more formalized mechanism of support. It establishes an expanded communication and engagement pattern with the senior stakeholder group through the Defense Human Resources Board (DHRB).
- 2 **Compliance:** This phase of the framework is based on the foundation of a clearly defined policy footprint, analytics capability, strategic direction and action based implementation roadmap. The component content includes the gaining of approval and publishing of DoD EO/EEOD issuances. It includes the publishing of the Diversity and Inclusion (D&I) Strategic Plan and also the socialization, adoption and implementation of the plan. It also involves the establishment of robust analytical capability throughout DoD and the development of a strategic communications capability and plan. The Compliance component provides guidelines and structure related to EO/EEOD program implementation across DoD and will create a coordinated plan of action for strategic ODMEIO efforts. Finally, it will ensure that ODMEIO has buy-in and support to implement the plan and achieve results.
- 3 **Assessment:** This component involves creating an EO and EEOD program assessment so that stakeholders and constituencies have a comprehensive measurement-based case for action. The Assessment Components include: (1) Definition of assessment indicators, (2) Program execution, (3) Development of an Assessment Framework and (4) Publishing of results of assessment findings

As noted above, Booz Allen has already designed the Accountability framework under the current contract and will work with ODMEIO senior officers during the bridge contract phase to refine the framework and codify changes. In addition, the team will develop presentations that will allow the framework to be rolled out to various stakeholder groups. For this bridge period, Booz Allen will provide similar work that will be mutually agreed upon with the government. The tables below delineate the anticipated deliverables for this Option period.

Item 4004—Reserved (Strategic Communications)

Item 4005—Implementation of Diversity and Inclusion Strategic Plan

Booz Allen will continue to provide consulting support to the ODMEIO team and DDWG to further develop the DoD Diversity and Inclusion Implementation Plan. The strategic implementation plan provides a baseline for diversity action within DoD and also serves as an implementation roadmap for the Components. During work in Government Fiscal Year 2012, the Booz Allen team engaged ODMEIO and the DDWG to develop implementation initiatives. Booz Allen will now continue to hone the metrics framework in support of progress measurement, and work with OSD entities, agencies and components to execute progress on the plan and integrate it with an increasingly broader range of stakeholders and staff. Booz Allen will also work with ODMEIO senior leadership to support the effort for agency and senior leadership to provide the approval and support of the implementation actions, programs and initiatives. Finally, Booz Allen will refine the Implementation plan as priorities, leadership and oversight agency requirements evolve. In addition, Booz Allen will provide facilitation support to the DDWG sessions will be supported for this effort. For this bridge period, Booz Allen will provide similar work that will be mutually agreed upon with the government. The tables below delineate the anticipated deliverables for Option 4.

Item 3006—Sexual Harassment Prevention Framework

Based on the policy memorandum developed during the previous option period to address NDAA 2013 requirements, Booz Allen will work with the DoD MEO Director to informally coordinate multiple iterations of the memorandum among the Services. Booz Allen will attend the weekly MEO Working Group meetings to maintain an ongoing list of feedback and will update the policy memorandum accordingly. Additionally, Booz Allen will assemble a package for coordination that will include the necessary letters and support materials for disseminating to DoD Service senior leadership.

Item 3007—Reserved (Civil Rights Enforcement Plan/Implementation)

Item 3008—Reserved {Defense Equal Opportuntiy Management Institute (DEOMI) Transformation (Phase 1)}

Item 3009—Reserved {Defense Equal Opportuntiy Management Institute (DEOMI) Transformation (Phase 2)}

Item 3010—Reserved {Defense Equal Opportuntiy Management Institute (DEOMI) Transformation (Phase 3)}

Item 3011—Travel—Minor travel will be required.

8.0. Contract Management: The contractor will provide the following deliverables during the term of the contract as outlined in Table 1. Copies of the deliverables, as well as any and all other tangible materials and records of actions taken to support the contract, must be distributed as directed by the Contracting Officer Representative (COR). Paper/electronic copies of all deliverables will be produced as set forth in Table 1.

Table 1. Deliverables Schedule

Item 4001: Issuance Development and Monitoring Deliverable Summary	
1. Complete one draft of the Diversity Instruction	January 27
2. Outline one Draft Hazing Policy Memorandum	January 27
3. Conduct up to two meetings with ODMEO senior leaders outlining requirements for Issuances management and relaying again the process that directives and instructions must go through within DoD	January 27
4. Monthly Status Report: Issuance Task area sub-section	December 30 and January 27
Item 4002 Analytic Support and Ad-Hoc Reporting Analytics Deliverable Summary	
1. Complete two (2) Minority Report Drafts	January 27
2. Complete one (1) Draft M & RA Report	January 27
3. Finalize one (1) MD-715 Assessment Report (FY12)	January 27
4. Develop a Calendar of Congressional, P&R, DoD Reporting Requirements	January 27
5. Provide up to two (2) Ad Hoc Reports, as requested by ODMEO	January 27
6. Monthly Status Report: Analytics Task area sub-section	December 30 and January 27
Item 4003: Accountability Framework Implementation Deliverable Summary	
1. Conduct at least three (3) Meetings with ODMEO Directors to continue to refine core program accountability approaches	January 27
2. Begin the Implementation of at least three (3) Core program accountability Priorities	January 27
3. Develop a draft Agenda of the Senior Leadership Engagement Summit for ODMEO Director approval	January 27
4. Monthly Status Report: Accountability Task area sub-section	December 30 and January 27
Item 4005: Implementation of the Diversity and Inclusion Strategic Plan Deliverable Summary	
1. Develop one (1) outline of the Diversity and Inclusion Summary Report	January 27
2. Provide one (1) Summary Presentation outlining suggested enhancements to the Strategic Implementation Plan/Our Update	January 27

3. Work with the D&I Director to identify one (1) additional D&I functional priority	January 27
4. Monthly Status Report: Implementation of D&I Task area sub-section	December 30 and January 27

Item 4006 Sexual Harassment Prevention Framework Deliverable Summary	
1. Complete one (1) Military Service coordination ready Draft Prevention of Sexual Harassment policy memorandum – NDAA requirement	January 27
2. Develop one (1) Package assembly for Services coordination	January 27
3. Monthly Status Report: Sexual Harassment Prevention Task area sub-section	December 30 and January 27

9.0 Monthly Status Report. The Contractor shall provide a monthly written status report documenting task support, issues and progress. The report shall detail contractor activities during the reporting month and plan for the following month(s). The report shall include a summary of work performed and deliverables completed, current or projected problems and issues and their resolution, and explanation of the deviations from the last month’s projections and any recommendations related to the effort.

10.0 Progress Reviews: Will be performed as directed by the Contracting Officer’s Representative (COR) and will generally summarize the status and progress of all activities being performed by the contractor under this Performance work statement. Progress reviews will take place at those locations requested by the COR. Specific dates for progress reviews will be agreed between the COR and the contractor’s Program Manager.

The Contractor will arrange and conduct briefs and presentations, as well as prepare specific and concise strategies and action plans to address issues raised.

11.0 TRANSITION

The Contractor shall follow its transition plan submitted as part of their proposal and keep the Government fully informed of status throughout the transition period. Throughout the phase-in/phase-out periods, it is essential that attention be given to minimize interruptions or delays to work in progress that would impact the mission. The Contractor must plan for the transfer of work control, delineating the method for processing and assigning tasks during the phase-in/phase-out periods.

11.1 Phase-in

The Contractor shall submit a detailed phase-in plan to include start-up activities that may be required to transition to full operational capability upon conclusion of the transition period.

The Contractor shall:

Provide a detailed transition methodology in logical sequence to ensure a smooth transition of all tasks/subtasks of the contract without interruption or degradation of service levels; Provide a timeline for completion during the 30 day phase-in period; and Identify associated risks and issues and risk mitigation strategies.

11.2 Phase-out

The Contractor shall provide a phase-out plan no later than sixty (60) days prior to expiration of this contract. The Contractor shall maintain complete documentation that is totally assessable to the designated Government representatives via a web portal or some other portal as the Government directs. The Contractor shall overlap with incoming Contractor during transition for a nominal period of 30 days and will work with Government personnel and the incoming contractor to transfer knowledge, information and documentation for all projects and tasks related to this contract. The type of information and documentation to be transferred includes but is not limited to:

Provide a detailed transition methodology in logical sequence to ensure a smooth transition of all tasks/subtasks of the contract without interruption or degradation of service levels; Provide a timeline for completion; and Identify associated risks and issues and risk mitigation strategies.
Note: All automated data files in the possession of the contractor are the property of the Government and shall be turned over to the KO or the COR at the completion or termination of the contract. Additionally, all records related to the execution of the current contract shall be returned to the Government as electronic copies that are readable and accessible by the Government.