

SECTION C – DESCRIPTIONS AND SPECIFICATIONS

PERFORMANCE WORK STATEMENT (PWS) MILITARY COMMUNITY AND FAMILY SUPPORT SERVICES MILITARY ONESOURCE (MOS) PROGRAM

1.0 INTRODUCTION

On behalf of the Military Departments and the Guard and Reserve Components, the Department of Defense (DoD) requires a Contractor to provide services in support of the Military OneSource (MOS) Program, a commercial employee assistance program (EAP) for military members and their families. This program, a primary source of information for troops and families, provides members of the Armed Forces and their families, about 5.4 million persons “Participants” (reference Section J-2) at locations worldwide, with a broad array of information and referrals to both military and civilian resources as well as counseling services. Over the course of this contract, the DoD may also designate other categories of personnel to be Participants.

These services shall be available 24 hours a day, 7 days a week, through the Internet, by telephone (via 800 number and collect calls), e-mail, postal, and face-to-face counseling (which is provided upon request).

This is a dynamic environment encompassing comprehensive support systems related to military members and their families. Unpredictable world events (such as natural or man-made disasters) and military situations (such as unscheduled deployments) may affect this contract, thus challenging DoD and the Contractor with developing innovative options and solutions to support military members and their families in a “just-in-time” mode.

1.1 SCOPE OF WORK

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

There are emerging needs for this requirement; some already established, others arising, and additional needs are expected to develop in the future. It can be challenging to predict specific emerging needs; therefore, the flexibility and capacity of the Contractor to address these needs is most imperative. This is a dynamic environment encompassing quality of life support systems for military members and their dependents. The intent is to have a flexible contract that allows the Government to quickly address changing social dynamics, educational requirements and/or military missions. The evolving needs of the Participants may drive modification of MOS program to satisfy such in a rapidly changing environment. Participant needs require a Contractor to employ a broad range of both military specific and civilian resources to quickly adjust based on demand signals.

1.1.1 Individuals are eligible to be MOS Participants and receive all services if they are:

- Active duty members of the Military Services (Army, Navy, Marine Corps, and Air Force) and their immediate family, which includes spouses as defined by 1 U.S.C. Section 7, children, and anyone who has legal responsibility for a Service member’s children or dependent parent during deployment or separation;
- Members of the Army Guard, Air Guard, the Army, Navy, Marine Corps, and Air Force Reserves (including the Selected Reserve, Individual Ready Reserve, and Standby Reserve), and their immediate family, which includes spouses as defined by 1 U.S.C. Section 7, children, and anyone who has legal responsibility for a Service member’s children or dependent parent during deployment or separation;
- Members of the U.S. Coast Guard on active duty and activated reserve personnel deployed or mobilized under the Title 10 authority of the DoD.

- Members of the DoD Civilian Expeditionary Workforce during the 90 days prior to deployment and 180 days post-deployment, and their immediate family, which includes spouses as defined by 1 U.S.C. Section 7, children, and anyone who has legal responsibility for a Civilian Expeditionary Worker's children or dependent parent during deployment or separation (reference Section J-18).

Limited services, generally those that are not billed per unit of service, are available to the following individuals:

- DoD Civilians, National Guard and Reserve employees, Government contractors, State Government civilians, contractors, and organizations who provide direct support to service members and military family members, to include employees of Navy Fleet & Family Readiness, Army Community Services, Marine Corps Community Services, Air Force Family Readiness; Chaplains; Medical Personnel and employees of the DoD Education Activity, State Joint Forces Headquarters (HQ), Family Assistance Centers, Veterans Department, American Legion, and Veterans of Foreign Wars in support of their efforts to assist military members and their families. Family members of employees are not eligible.
- Survivors of deceased service members, regardless of cause of death. Eligibility applies to survivors of Active Duty, Guard and Reserve service members regardless of activation status. Survivors include un-remarried surviving spouses as defined by 1 U.S.C. Section 7, children, parents, legal guardians, siblings, grandparents, and persons authorized to direct disposition of a Service member's remains.

There are other Participant populations that receive partial and time limited services which are specific and subject to change such as medically discharged service members and their immediate family; caregivers and parents of Wounded, Ill, and Injured; retired and discharged service members and their immediate family; non-military/non-spouses (i.e., partners and former spouses as defined by 1 U.S.C. Section 7) who are the parent of a dependent child; parents and extended family members of Active Duty, Guard, and Reserve service members; Reserve Officers' Training Corps and Military Academy Cadets; and Delayed Entry Recruits, their parents, and immediate family members.

A MOS Eligibility Matrix will be provided to the Contractor by DoD upon contract award.

1.1.2 The MOS Program includes, but is not limited to: Call Center operations providing expert information/referral and educational/consultation services, as well as educational/information materials and non-medical counseling services. Information/referral and education/consultation services shall cover the full range of quality of life services/programs in both the military and civilian sectors. Services shall be provided both in the Continental United States (CONUS) and Outside the Continental United States (OCONUS) through MOS. Face-to-face non-medical counseling with MOS shall be provided within the Continental United States (CONUS) to include Alaska and Hawaii. For face to face non-medical counseling OCONUS, participants will be offered a referral to the Military Family Life Counseling (MFLC) Program.

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

1.1.4 All MOS staff and network providers, health and wellness coaches, and financial counselors or any other Contract or Subcontracted personnel performing any part of this requirement, or having access to any data, information, or work product generated during the performance of this Contract, must be U.S. citizens and must speak fluent English.

1.1.5 MOS staff and non-medical counseling staff or network providers, health and wellness coaches, and financial counselors may not transport any MOS-connected Participant in any vehicle and may not physically enter a Participant's home at any time.

2.0 APPLICABLE DOCUMENTS AND REFERENCES

Information sources used for program and content development will be from official Government sources or authorized affiliates. Internet domains .gov, .mil and .edu, are the primary resource sources (reference Section J-See) for mandatory compliance requirements of this PWS.

2.0.1 The Contractor's name or corporate logo, as well as any reference to the Contractor, shall not be included on any documentation, literature or materials associated with MOS, to include the MOS EAP web presence.

2.0.2 Proprietary rights for all products, services and resources developed for the MOS Program are property of the Government and will be retained by the Government upon Contract completion.

3.0 REQUIREMENTS FOR MILITARY ONESOURCE PROGRAM

The Contractor shall provide commercial EAP and Call Center services to manage and operate DoD's MOS Program, 24/7. Call Center(s) shall be located in the CONUS. Information and referral services provided include, but are not limited to: adoption information, child care, exceptional family member programs, deployment support, disability information, elder care, educational services for adults, children and youth, spouse education and career information, relocation services, pet care, non-medical counseling, financial counseling, tax assistance, health and wellness coaching, housing assistance, legal service referrals, single service member services, lodging, military benefits, parenting, and everyday issues (e.g. locating a plumber, car repair, etc.). As Government programs and requirements change, the Contractor shall support these as directed and approved by the Contracting Officer's Representative (COR).

4.0 MISSION REQUIREMENTS

4.1 MOS CALL CENTER OBJECTIVE

To encompass all resources and development of resources, processes, personnel, materials, training, equipment, and technology necessary to provide Participants with unlimited access (via 24-hour, toll-free telephone and on-line/Internet) to stateside and international information, referral and counseling services available through a centralized source.

4.2 MOS CALL CENTER MINIMUM REQUIREMENTS

The Contractor shall provide the staff, processes, procedures, and the technological infrastructure necessary to operate a 24/7 toll free MOS EAP Call Center.

4.2.1 The Call Center triage consultants answering the telephones shall have, at minimum, a Master's degree from an accredited graduate program in a mental health related field such as social work, psychology, marriage/family therapy, or counseling, possess strong customer service skills, knowledge of call center operations, and knowledge and understanding of the military lifestyle. Call Center supervisors shall have, at a minimum, three years recent and relevant practical supervisory experience and a Master's degree from an accredited graduate program in a mental health related field such as social work, psychology, marriage/family therapy, or counseling. Supervisors will hold a current, valid unrestricted counseling license/certification from any of the fifty states, the District of Columbia, a U.S. Commonwealth, or a U.S. Territory that grants the authority to provide counseling services as an independent practitioner in their respective fields. Supervisors are preferably a Certified Employee Assistance Professional (CEAP) and have demonstrated counseling competence preceding their employment with the MOS Program.

4.2.2 The Contractor shall maintain the current MOS 800 number ensuring that a single number can be used by Participants from any location world-wide to access the MOS Call Center. The Contractor will be responsible for all costs associated with the toll free services including service provider fees and usage charges. The Contractor's technical infrastructure provides back up Call Center capability with a Return to Operation (RTO) of 5 seconds or less for any catastrophic disaster or service interruption. The Call Center service shall include redundant back-up call capability with trained and experienced personnel and technical support capable of supporting toll-free stateside and international calls from MOS Participants.

4.2.3 The Contractor will have Call Center triage consultants answer calls and identify the caller's inquiry or issue at which point a warm hand-off, referral and/or information is provided. A confidentiality statement shall be provided to all callers informing MOS Participants that their information will be kept confidential, except to meet obligations or to prevent harm to self or others such as suicidal thoughts or intent, a desire to harm oneself and violence against any person including sexual assault. Mandated reports include domestic abuse, child abuse or neglect, abuse of a vulnerable adult and any present or future illegal activity.

4.2.4 The procedures for a warm hand-off will ensure that Participants do not have to repeat their story or issue when a third party agency is engaged in the conversation. During the warm hand-off overlap, the Call Center staff, at a minimum, will maintain a no-hold telephonic connection and convey pertinent information citing the Participant's issue(s) and need of specialized services not provided by MOS, and will ensure a verbal connection is secured prior to exiting the warm hand-off telephone connection. No identifying information shall be provided without the expressed consent of the Participant for a referral or warm hand-off (reference Sections J-28 & 29)

4.2.5 The Call Center triage consultants will answer calls for the DoD Spouse Education and Career Opportunities (SECO) Program, which, including the SECO Career Center, is provided under a separate contract. If a caller is determined to be a military spouse calling for education or career information or counseling, or is calling for information regarding the My Career Advancement Account (MyCAA) Program or Military Spouse Employment Partnership (MSEP) Program, the call will be transferred to a SECO Career Center counselor, via warm hand-off, during SECO Career Center regular operating hours of seven am until ten pm (7am-10pm) eastern time Monday through Friday and from ten am until five pm (10am-5pm) eastern time on Saturday. The MOS triage consultant will establish an initial case record for the caller, in the Government provided Case Management System (CMS) (reference Section J-43), so that the SECO Career Center staff will be able to access the caller's information as the call is transferred.

4.2.6 For calls received from a military spouse for SECO, MyCAA, or MSEP outside of the SECO Career Center operating hours, MOS triage consultants will take a message and log the message in the CMS message queue to be returned by the SECO Career Center staff within the next three business days.

4.2.7 For calls received from a MyCAA School representative, MSEP Partner or corporation, MOS triage consultants will provide a warm hand off and a telephone number, which will be provided by the Government, to the SECO MyCAA School liaison team or the SECO MSEP Partner liaison team. MOS triage consultants will take a message and log the message in the CMS message queue to be returned by the SECO Career Center staff within the next three business days.

4.2.8 For those seeking non-medical counseling services, clinical assessments ARE NOT CONDUCTED, but a brief question and answer series is conducted to ascertain scope of care the caller requires. If the caller's situation is not appropriate for non-medical counseling, assistance will be provided to the caller to receive referral information for a warm hand-off to TRICARE, a military treatment facility, a military support program such as the Family Advocacy Program (FAP) (reference Section J-12), Sexual Assault Resource Center (SARC) (reference Sections J-14 & 15), Victim Advocacy, or a community mental health resource. Community based information and resources should be researched for Guard and Reserve, who may not have health insurance or TRICARE Reserve Select (reference Section J-3).

4.2.9 For eligible Participants seeking more in depth information on specific issues, specialty consultants will be available to address core areas in services such as Special Needs, Adoption, Elder Care, Adult Disability, Education, Work Life, Document Translation, and Bulk MOS Fulfillment Items (reference Sections J-25, 26, 35, 37 & 39).

4.2.10 As directed by the National Defense Authorization Act (NDAA) of January 2008 (reference Section J-34, p. 1,191 labeled 1,159), specialty consultations for Wounded Warriors will include identifying issues and coordinating with DoD, Veterans Affairs (VA), Department of Labor (DOL) and other federal agencies. The NDAA requires that DoD provide a secondary level of assistance to facilitate issues that are unresolved at the Service and other agency levels.

4.2.10.1 Specialty consultations for Wounded Warriors will follow DoD provided protocols to respond to all Wounded Warrior inquires involving a report of deficiencies to assure that referrals are submitted within 1 hour of

receipt to designated individual(s) within the respective Service Wounded Warrior program or VA to facilitate development of a Plan of Action within 96 hours of receipt of the call (reference Sections J-34 & 35).

4.2.10.2 Consultations will involve frequent information exchange to institute this directed response to Wounded Warriors and their families, to include coordinating with military Services Wounded Warrior program representatives, VA, and TRICARE to resolve Wounded Warrior issues (e.g., long delays in obtaining appointments, significant geographic distance from facilities, or complaints about the quality of services they receive).

4.2.11 The Contractor shall make outbound contacts to specific groups within the served population. Follow-up contacts will be made in order to ensure that services delivered met the requirements, needs and expectations of the Participant. Normally, approval to contact must be obtained from the Participant during their original request for assistance, ensuring the Participant has provided confidential contact information. Additionally, in order to meet the changing needs of military members, their families, and the DoD, other specific outbound contact services may be added (e.g., to conduct surveys, or provide emergency information) as directed by the Government. Outbound calls are not made to potential participants who have not contacted MOS.

4.2.12 The Contractor's technical infrastructure shall support translation/interpretation capability. Contractor telephone integration shall include a process and capability to use interpreters/translators for telephone calls. Translation services will be offered to Participants using the Call Center in relation to a MOS Participant case for services. Translation services will also be available for legal documents (e.g. leases, marriage licenses, adoptions, utility bills, etc.).

4.2.13 The Contractor shall provide access to telephone and Internet services that meet the standards of Section 508, Amendment to the Rehabilitation Act of 1973.

4.2.14 The Contractor shall provide security to protect the confidentiality, integrity, and availability of data in accordance with (IAW) all applicable Federal laws, regulations, policies, and industry standards IAW appropriate access control, comprehensive intrusion detection, comprehensive virus protection, formal incident response procedures, vulnerability monitoring and mitigation, and periodic (at least annual) third party security assessments to ensure ongoing effectiveness.

4.2.15 Contractor shall ensure all data collection and storage systems that provide for DoD level information and system security protect the confidentiality, integrity, and availability of data in order of precedence with all applicable Federal laws, DoD regulations and policies, State laws, and industry standards. Contractor shall ensure that all electronic data collection and storage systems are designed with access control, comprehensive intrusion detection, and comprehensive virus protection. Contractor shall develop and implement formal incident response procedures, vulnerability monitoring and mitigation.

4.2.16 The Contractor's technical infrastructure and telecommunication capabilities shall support 24/7 Call Center operations to receive both CONUS and OCONUS calls.

4.2.17 The Government requires that MOS services (1-800 Call Centers) are available 24/7 despite any natural or man-made disasters (reference Section J-10) . In the event of a disaster, the MOS telephone number will serve as the primary DoD-wide information source.

4.3 MOS EAP WEB PRESENCE

The Contractor will maintain a web presence that supports EAP online services offered only to eligible Participants. The Contractor shall provide an IT Integration Plan that describes how the EAP web presence will interface and visually blend with the Government public website (militaryonesource.mil). The Contractor shall host and maintain an EAP web presence which will provide online services or information directly to MOS families. It is expected to be hosted and maintained by the contractor. Access to the site will be restricted to eligible MOS families and providers.

4.4 MOS EAP WEB PRESENCE INTERFACING REQUIREMENTS

- 4.4.1 The Contractor's web presence will meet the standards of Section 508, Amendment to the Rehabilitation Act of 1973 for website, voice and data services and content shall be available in English. At a minimum, compliance includes TDD/TTY (telecommunications devices for the deaf) or other technical solutions.
- 4.4.2 The militaryonesource.mil public website will link to the EAP web presence.
- 4.4.3 The EAP web presence must be consistent with the militaryonesource.mil design.
- 4.4.4 The Contractor shall provide a single entry point into the EAP services with a secure login capability.
- 4.4.5 The EAP web presence access authentication will be provided by the Government through a Simple Object Access Protocol (SOAP) web service Application Programming Interface (API) (reference Section J-23).
- 4.4.6 The Contractor's technical infrastructure and capabilities must support 24/7 operations with resources available to both CONUS and OCONUS Participants.
- 4.4.7 The EAP web presence will use the ".org" URL domain space.

4.5 THE CONTRACTOR IS REQUIRED TO PROVIDE NETWORK REDIRECTION SERVICES TO REDIRECT MILITARYONSOURCE.COM WEB TRAFFIC TO THE MILITARYONESOURCE.MIL SITE

- 4.5.1 This requires the ability to interrogate incoming .com requests, identify specific data in the request and redirect it to a specific page on the .MIL website (reference Section J-21).
- 4.5.2 This requires the ability to redirect specific MOS .COM e-mail traffic to specific MOS .MIL addresses.

5.0 NON-MEDICAL COUNSELING OBJECTIVE

To provide private, confidential non-medical counseling utilizing a short-term, solution focused counseling EAP model for eligible Participants.

- Non-medical counseling services are available to all Service members and their families as specified in Section 1.2.1 of this PWS. **The MOS Program does not provide clinical mental health counseling, treatment and/or therapy.**
- The Contractor is responsible for ensuring MOS staff and network providers adhere to the scope of practice for MOS non-medical counseling (reference Section J-32). All network providers accepting MOS non-medical counseling clients must provide a signed network provider agreement acknowledging adherence to practicing within the scope of MOS services.
- Non-medical counseling is not intended to augment, or replace, existing military/civilian mental health support services, nor is it intended to bridge a gap in services to TRICARE or military treatment facilities (MTF) (e.g. providing MOS non-medical counseling services that are out of scope until Participant will obtain access to mental health services via any source to include Service or Component funded staff positions or programs).
- Non-medical counseling is an integral part of military and family support services that are targeted to ensure personal and family issues do not detract from operational readiness, to strengthen individuals and families by assisting them in the problem-solving process, and to increase individual and family member resiliency and confidence.

- Non-medical counseling is focused on a specific issue or concern and includes developing strategies and solutions building on the Participant's strengths, accessing support systems, and utilizing community resources.
- Non-medical counseling will be delivered and maintained IAW commercial standards and professional EAP Programs, to include additional aspects specifically pertaining to MOS non-medical counseling scope of care and reporting mandates (reference Sections J-30 & 32).
- Although Council on Accreditation (COA) and Utilization Review Accreditation Commission (URAC) accreditation is not a requirement of this program, the minimum standards of these accrediting bodies shall be met (reference Section J-5ee).

5.0.1 MOS non-medical counseling is intended to be solution-focused, short-term for defined problem areas amenable to brief intervention. Participants will be screened for scope of care required (reference Section J-32). Services can be delivered in the traditional manner of fifty minute sessions in an office setting, face-to-face (CONUS only), to individuals, couples, and families. Non-medical counseling will also be offered telephonically, over the Internet via secure instant messaging or via real-time audio/video secure connection, or any other innovative technical solutions as approved in writing by the COR, to eligible Participants worldwide. Appointments will be available during normal network provider business hours, to include evenings and weekends, but will not be expected to be offered 24/7. Though appointments are not expected to be provided 24/7, non-medical counseling sessions delivered telephonically, over the Internet via secure instant messaging, and by real-time audio/video secure connection must be able to accommodate foreign time zones for Participants located OCONUS. Eligible participants may receive up to twelve non-medical counseling sessions per person per issue at no cost to the Participant.

5.0.2 Non-medical counselors may NOT self-refer for clinical mental health **counseling, treatment and/or therapy**. At the time a Participant is determined to need clinical mental health **counseling, treatment and/or therapy**, the Contractor is to provide a warm hand-off or referral directly to TRICARE or the MTF for Active Duty and their families. For Guard and Reserve members and their families, a referral to the VA, or assistance in utilizing their existing health insurance benefits or assistance in obtaining community mental health resources for those with no health insurance to obtain clinical mental health therapy, is expected. The Contractor will not imply or engage in self-promotion to secure clinical referrals from MOS Participants.

5.1 CONFIDENTIALITY

All employees, contractors, and subcontractors who will have access to Participant information will be advised of the confidential nature of the information, that records are subject to the requirements of the Privacy Act of 1974, and that unauthorized disclosure of Participant information may result in the imposition of possible criminal penalties (reference Section J-27).

5.2 INFORMED CONSENT

IAW DoD Instruction No. 6490.06 (reference Section J-11), MOS staff and network providers shall provide informed consent information to the individual and/or family member during the initial counseling contact (reference Section J-27).

5.3 DUTY TO WARN/MANDATED REPORTS

The Contractor shall maintain, implement and adhere to established Government MOS processes and procedures for its obligations, as it applies to Duty to Warn and Mandated report issues, in the event a Participant reveals such information (reference Section J-30).

5.4 DOCUMENTATION

5.4.1 The Contractor shall retain documentation as required on all non-medical counseling. Formal counseling case records including personally identifiable information (PII) will be maintained by the Contractor. Case records (reference Section J-3) must be immediately accessible to the Government MOS Program Office at all times electronically for quality assurance, response to Congressional inquiries or other requested reviews and ad-hoc reports.

5.4.2 Formal documentation of all non-medical counseling pertaining to all MOS Participants is required.

5.4.3 Case notes (reference Section J-3) must comply with legal requirements as required by state laws or regulations and must routinely be submitted in the Government CMS within 15 calendar days after each session.

5.4.4 In the event of an adverse incident, follow prescribed policies and procedures listed in Section J-31.

5.4.5 V-code indicators must be documented in the activity report upon every contact with the MOS network provider. In the event the issue is not documented to be reflective of a V-code, the accurate diagnostic indicator shall be identified; using the Diagnostic and Statistical Manual of Mental Disorders, Latest Editions code(s), and the Participant shall be referred for appropriate clinical support.

5.4.6 Case closure summaries (reference Section J-3) are required for all case records. Planning for case closure is clearly defined, begins at intake, and involves the Participant and others, as appropriate. When a Participant has utilized the maximum allowable number of sessions per EAP contract and modality chosen, the network provider is responsible to assist Participant to obtain services that are appropriate and work with the person to identify other service options. Cases should be closed upon completion of services, and/or referral to another service/resource, or within 30 days of no contact, after three reasonable attempts have been made to reengage the Participant.

5.4.7 A separate and distinct non-medical counseling case record is maintained for each Participant that is never part of, or stored with any other Participant related record. The Contractor's policy shall define a "Participant," and address the following: when a new Participant record is to be created; separation of Participant record contents when services are provided to individuals, couples, and/or families; and separation of Participant record contents when services are provided to minors. The Contractor's policy will establish record-keeping practices based upon the definition of "Participant" and address the following: compliance with federal and state regulations regarding confidentiality of record contents; disclosure protocols when the Participant case record includes services provided to couples or families; and disclosure protocols when the Participant case record includes services provided to minors. The Contractor's policy and contract with network establishes ownership of Participant case records from their network providers/counselors. The case records are a product of the work contracted for the Government and therefore property of the Government.

5.5 NON-MEDICAL COUNSELING REFERRALS

5.5.1 If the Participant requests non-medical counseling during the initial contact, the Contractor shall ascertain if the Participant's issues are in scope for services (reference Section J-32). If the Participant is in scope for services and the Participant is **active duty, an activated Guard or Reservist or family member and is within a driving distance of 40 minutes to a military installation that has a MFLC Program (CONUS or OCONUS)**, the Participant shall be offered a referral to the MFLC (reference Section J-38).

If the Participant is in scope for services but does not meet the criteria, listed above, for a referral to the MFLC Program, they are directly handed-off to a MOS network provider for face to face, telephonic, over the Internet via secure instant messaging or via real-time audio/video secure connection, or any other innovative technical solution as approved in writing by the COR.

If the Participant is not active duty and is a non-activated Guard or Reservist or an activated member of the Civilian Expeditionary Workforce, they are directly handed-off to a MOS network provider immediately for face to face, telephonic, over the Internet via secure instant messaging or via real-time audio/video secure connection, or any other innovative technical solution as approved in writing by the COR.

If the Participant's issue is determined to be out of scope for services, a warm hand-off is required.

5.5.2 The Contractor shall attempt to satisfy Participant preferences regarding age, gender, culture, and language when providing a warm handoff or referral for non-medical counseling.

5.6 PARTICIPANT FEEDBACK

With the Participant's approval, the Contractor shall obtain directly from the Participant feedback after the initial non-medical counseling session and after case closure, utilizing a Government provided feedback instrument to ensure a consistent high level of quality. Feedback opportunities will be made to military members and their families in order to ensure that services delivered met the requirements, needs and expectations of the participant and to document outcomes and effectiveness of the non-medical counseling services. Approval to contact must be obtained from the Participant on their original contact or request for assistance. At the direction of the Government, the Contractor may be requested to utilize other additional feedback questions or instruments.

5.7 NOTIFICATION OF ADVERSE INCIDENT

The Contractor shall develop, maintain, and execute a process for notification to the Government MOS Program Office (COR and Government Program Manager (PM)) within 24 hours of any situation or incident that could potentially generate media or other attention to the MOS Program (reference Section J-31).

5.8 REQUIREMENTS FOR ALL NON-MEDICAL COUNSELING

The Contractor shall provide access to a national network that provides non-medical counseling to Participants. The Contractor shall ensure that all personnel maintain the highest degree of sensitivity, compassion, and respect for Service members and their families.

5.8.1 The Contractor shall maintain procedures for responding to Duty to Warn and Mandated Reporting situations (reference Sections J-3, 12, 13, 14, 15, & 30).

5.8.2 The Contractor shall develop and implement an approach and processes to manage network providers, ensuring timeliness and efficiency and avoiding disruption or degradation of services. This approach shall account for the complexities of network providers providing field services and shall also account for short notice or immediate requirements that require expedient response. The Contractor's network shall ensure access to face-to-face counseling is within fifteen miles or thirty minutes drive time of the Participant. Face-to-face non-medical counseling in the traditional manner of fifty minute sessions in an office setting to individuals, couples, and families consisting of 12 sessions available only in CONUS (reference Sections J-29 & 32).

5.8.3 MOS staff and network providers will verify eligibility for services, which will include viewing a military identification card or dependent identification card and documenting this upon intake for face-to-face counseling sessions. Photocopying the identification card **IS NOT PERMITTED**. Photocopying of a US Government Identification card is a violation of Title 18, US Code Part I, Chapter 33, Section 701 and punishable by both fine and/or imprisonment (reference Section J-6). This requirement can be subject to change in the event eligibility can be confirmed and verified at triage utilizing the Government's CMS.

5.9 CREDENTIALING

All staff, network providers and supervisors must have submitted required documentation and have undergone credentials review/verification by the Contractor of all items in this section prior to performing under this contract.

5.9.1 The Contractor shall not utilize a network provider for non-medical counseling, at any location at any time during the performance of this contract, until a Criminal History Background Check and Fingerprint Check have been initiated (submitted to appropriate agency completing the check). Contractor personnel/providers who have previously received an acceptable Criminal History Background Check and Fingerprint Check shall provide proof to the prime Contractor prior to performing under this contract. The level of Criminal History Background Check and Fingerprint Check shall be at a minimum the same level described in DoD Instruction No. 1402.5 (reference Section

J-17) for **all** non-medical counselors/providers. Criminal History Background Checks and Fingerprint Checks must be completed within 60 days of initiation. Parental approval, documented in writing, is required for all Participants under the age of 18 receiving non-medical counseling services. Duty to Warn or Mandated report situations do not require parental/guardian approval in order to report to authorities (reference Section J-30).

5.9.2 Non-medical counselors shall have a least a Master’s degree from an accredited graduate program in a mental health related field such as social work, psychology, marriage/family therapy, or counseling, hold a current valid unrestricted counseling license/certification from a State, the District of Columbia, a U.S. Commonwealth, or a U.S. Territory that grants the authority to provide counseling services as an independent practitioner in their respective fields and possess demonstrated counseling competence preceding their employment with the MOS Program. Counselors must adhere to commercial and professional standards of practice set forth by federal, state, and local laws, as well as relevant DoD/Military Branch of Service and Component policies (reference Sections J-12 & 30). All counselors must be licensed, certified, properly credentialed to perform this requirement and be compliant with the commercial industry accepted standards for the performance of EAP programs and non-medical counseling program guidance and scope requirements.

5.9.3 Credentialing for non-medical counseling (face-to-face, telephonic, and online): the MOS counselor **MUST BE licensed in the State in which the Participant is receiving the services.** If the Participant is receiving telephonic or online counseling while located OCONUS, the MOS counselor may be licensed in any state.

5.9.4 In addition to meeting the above requirements, the network provider supervisors must have a minimum of two years full-time counseling experience post-licensure; documented counseling supervision, oversight and management experience; and demonstrated current counseling competence and preferably a CEAP having demonstrated counseling supervisory competence preceding their employment with the MOS Program.

5.9.5 The Contractor shall annually certify and be able to demonstrate (at any time) to the Government MOS Program Office or Contracting Officer (CO), in writing, that the counselors/network providers and supervisors licensure, credentials, proof of insurance, required experience, background checks and fingerprint checks are current and proper for performance under this contract. This certification shall verify that the network provider has not experienced any terminations of performance under any other Government contract, any license suspensions or any investigations. Counselors, who have experienced any of the aforementioned actions, will not perform services under this contract. The Contractor shall certify, upon award and the exercise of each option period, that all non-medical counselors and supervisors are properly licensed or certified, comply with the appropriate background check and fingerprint check requirements, and possess all other qualifications as indicated in the PWS **prior to beginning work with a MOS Participant.** The Contractor shall maintain all non-medical counseling provider/supervisor certifications, background check and fingerprint check documentation for the life of this contract, and make them available for Government review at any time during performance. The Contractor shall inform the Government MOS Program Office (COR and Government PM) of any MOS counselors that have been placed on probation and/or remediation or have been removed from the network and reason for removal.

6.0 HEALTH AND WELLNESS COACHING PROGRAM OBJECTIVE

Contractor shall provide information and guidance to service members and their eligible family members on achieving and/or maintaining optimal health and wellness, physical fitness and establishing healthy habits. The MOS Health and Wellness Coaching Program is designed to educate and assist service members and their families in improving and maintaining their health. Although URAC or COA accreditation is not required for this program’s objective, their minimum requirements and standards shall be met for quality assurance standards (reference Section J-5ee).

6.1 MINIMUM REQUIREMENTS FOR HEALTH AND WELLNESS COACHING PROGRAM

Contractor shall provide health and wellness coaches that have at a minimum a Bachelor’s degree from an accredited college program in a Health Science related field and demonstrated current coaching competence preceding their employment with the MOS Health and Wellness Coaching Program.

6.1.1 Coaching sessions are provided, by appointment, telephonically and/or web-based or via the internet through web-based applications approved by the Government. Appointments will be available during normal network provider business hours, to include evenings and weekends, but will not be expected to be offered 24/7. Though appointments are not expected to be provided 24/7, coaching services must be able to accommodate foreign time zones for Participants located OCONUS. Contractor shall utilize their best technical solution to provide health and wellness coaching that includes documentation of sessions, assessment, outreach and engagement, and goal setting.

6.1.2 Sessions may be conducted pertaining to: Weight Management, Fitness and Exercise, Healthy Eating Habits, General Health and Wellness, Military Physical Fitness Test.

6.1.3 The Contractor shall provide documentation in the Government CMS within 15 calendar days after each session on all health and wellness coaching cases. Formal coaching records including PII will be maintained by the Contractor. Coaching records (reference Section J-3) must be immediately accessible to the Government MOS Program Office at all times electronically for quality assurance, response to Congressional inquiries or other requested reviews and ad-hoc reports. The Government provided CMS does not provide an online Health & Wellness Coaching platform.

6.1.4 If the Participant requests health and wellness coaching during the initial or ongoing contact, the health and wellness coach shall ascertain if the Participant's issues are in scope for services for health and wellness coaching and does not warrant medical attention and/or intervention. At the time a Participant is determined to need medical attention or assistance, the Contractor is to provide a warm hand-off or referral directly to TRICARE or MTF for active duty and their families. For Guard and Reserve members and their families, a referral to the VA, or assistance in how to utilize their existing health insurance benefits or assistance in obtaining healthcare resources for those with no health insurance is expected.

6.1.5 The Contractor shall not utilize a health and wellness coach, at any location at any time during the performance of this contract, until a Criminal History Background Check and Fingerprint Check have been initiated (submitted to appropriate agency completing the check). Contractor personnel/providers who have previously received an acceptable Criminal History Background Check and Fingerprint Check shall provide proof to the prime Contractor prior to performing under this contract. The level of Criminal History Background Check and Fingerprint Check shall be at a minimum the same level described in DoD Instruction No. 1402.5 (reference Section J-17) for **all** non-medical counselors/providers. Criminal History Background Checks and Fingerprint Checks must be completed within 60 days of initiation. Parental approval documented in writing is required for all Participants under the age of 18 receiving health and wellness coaching services. Duty to Warn or Mandated report situations do not require parental/guardian approval in order to report to authorities (reference Section J-30).

6.1.6 With the Participant's approval, the Contractor shall obtain directly from the Participant customer feedback after the initial health and wellness session and after completion of health and wellness sessions, utilizing a Government provided feedback instrument. Customer feedback opportunities will be made to military members and their families in order to ensure that services delivered met the requirements, needs and expectations of the Participant and to document outcomes and effectiveness of the health and wellness coaching services. Approval to contact must be obtained from the Participant on their original contact or request for assistance. At the direction of the Government, the Contractor may be requested to utilize other additional feedback questions or instruments.

6.1.7 All program aspects of the MOS Health and Wellness Coaching Program must be discussed with and approved by the Government MOS Program Office. No modifications, processes, policies or procedures can be implemented without written acknowledgement from the COR.

6.1.8 The Contractor shall annually certify and be able to demonstrate (at any time) to the Government MOS Program Office or CO, in writing, that the health and wellness coaches and supervisors credentials, required experience, background checks and fingerprint checks are current and proper for performance under this contract. This certification shall verify that the health and wellness coach has not experienced any terminations of performance under any other Government contract, suspensions or any investigations. Health and wellness coaches, who have experienced any of the aforementioned actions, will not perform services under this contract. The Contractor shall certify, upon award and the exercise of each option period, that all health and wellness coaches and supervisors are in possession of education and experience required, comply with the appropriate background check

and fingerprint check requirements, and possess all other qualifications as indicated in the PWS prior to beginning work with a MOS Participant. The Contractor shall inform the Government MOS Program Office (COR and Government PM) of any MOS health and wellness coaches that have been placed on probation and/or remediation or have been removed from the network and reason for removal.

6.1.9 Contractor will ensure all health and wellness coaches are knowledgeable of each branch (Army, Navy, Air Force and Marine Corps) physical fitness standards (reference Sections J-19a through f).

7.0 FINANCIAL COUNSELING OBJECTIVE

Service members and their families are responsible for their personal finances. Throughout a military career, service members and their families may need additional support and assistance with financial stability, money management, anticipating financial impacts due to deployments and relocation, and raising a financially stable family. Accredited and certified network counselors trained in financial matters shall provide personal and family financial counseling, planning, education, awareness information services, appropriate referrals, and assistance applicable to military families. Counseling services may be provided individually, to couples, and families.

The goal is to assist eligible Participants with personal financial management, provide financial counseling, and financial education to include appropriate guidance regarding the Service Member's Civil Relief Act (SCRA) Public Law 110-289 Housing and Economic Recovery Act of 2008 as well as other pertinent laws and policies (reference Section J-5k). Some Participants may require financial counseling to assist with establishing a basic level of financial literacy to develop good financial behaviors and habits. Financial counseling is not limited to twelve sessions per person per issue.

7.1 REQUIREMENTS FOR FINANCIAL COUNSELING

MOS financial staff and financial counselors shall maintain a national certification as an Accredited Financial Counselor (AFC), Certified Financial Planner (CFP), Chartered Financial Consultant (ChFC), or a national certification with the National Foundation for Credit Counseling (NFCC).

7.1.1 Contractor shall follow Government guidelines regarding employment and conflicts of interest. Financial counselors shall provide service delivery that meets the standards in DoD Instruction No. 1342.27 and assist service members and their families with personal financial management (reference Section J-16).

7.1.2 The Contractor shall inform the Government MOS Program Office (COR and Government PM) of any MOS financial counselors that have been placed on probation and/or remediation or have been removed from the network and reason for removal.

7.1.3 This type of counseling shall be provided by appointment, telephonically or face-to-face. Appointments will be available during normal network provider business hours, to include evenings and weekends, but will not be expected to be offered 24/7. Though appointments are not expected to be provided 24/7, financial counseling sessions delivered telephonically must be able to accommodate foreign time zones for Participants located OCONUS.

7.1.4 In cases of extreme financial hardship, threat of deprivation, or other similar circumstances, financial counselors shall ensure that Participants are referred to appropriate, sanctioned military resources such as Relief Societies, installation banks/credit unions, Chaplains, other state, federal, local and veterans' organizations, and other resources as appropriate.

7.1.5 MOS financial staff and network financial counselors shall provide individualized personal financial management, financial planning, and referral services when applicable, to Participants. However, MOS financial staff and financial counselors shall never give specific financial investment advice related to specific investment funds/opportunities.

7.2 MINIMUM REQUIREMENTS FOR TAX FILING SERVICES

Contractor shall provide tax filing support that allows Participants access to free tax filing services for Federal and multiple state returns as well as telephonic tax consultations. Eligible Participants shall be able to link directly to the tax filing service via the MOS EAP web presence.

7.2.1 Contractor is required to offer telephonic tax assistance consultations to assist Participants with their tax filing questions.

7.2.2 Contractor shall develop a list of most frequently asked/answered tax questions and post these questions to the Government-owned militaryonesource.mil public website.

7.2.3 Contractor shall provide contact information to MOS Participants for local military installation tax service support.

7.2.4 Contractor shall establish quality control procedures for tax service support specific to military tax issues.

7.2.5 Contractor shall provide a monthly status on usage, by month and cumulative, for state and Federal filings and report this data IAW Monthly Status and Progress Report requirements. The Contractor shall obtain Government approval of the tax assistance support plan prior to implementation on each option period.

8.0 STRATEGIC OUTREACH OBJECTIVE

Strategic outreach materials and plans will raise awareness of the MOS for Participants with emphasis on Service members and their families, military leaders and service counselors. Educational and informational materials build resiliency by providing Participants with in-depth information and resources that support Participant management of the challenges of military and family life.

8.1 MINIMUM REQUIREMENTS FOR STRATEGIC OUTREACH

The Contractor shall provide educational and informational materials and referral information normally provided as part of EAP support services. The Government MOS Program Office (COR and Government PM) will periodically review a sampling of EAP materials to ensure applicability for Participants. If any materials are determined to be unsuitable, the Contractor will be required to remove these from the materials sent to this contract's eligible population.

8.1.1 Materials shall be branded or identified in a manner directed and approved by the Government as MOS materials.

8.1.2 Materials shall be reviewed and updated to maintain relevance and accuracy.

8.1.3 As directed by the Government MOS Program Office (COR and Government PM), the Contractor shall replenish materials.

8.1.4 As directed by the Government MOS Program Office (COR and Government PM), the Contractor shall provide content and facilitation for online webinars on EAP topics and topics of interest to the military community.

8.1.5 The Contractor shall provide worldwide distribution services for all materials. Materials may be requested through the MOS toll-free number or an online fulfillment application provided by the Government and will reside on the MilitaryOneSource.mil website.

8.1.6 The Contractor shall provide warehouse, inventory management and distribution for all materials to include, but not limited to:

- All EAP provided materials (pamphlets, books, CDs, games, etc.).

- All existing Government owned MOS materials (reference Section J-39).
- All Government developed or purchased materials specified by the Government MOS Program Office.
- Materials provided to military Service members and their families as prescribed by the Government.

8.1.7 The Contractor shall ship materials out within 2 business days from the receipt of the request using the most cost effective, trackable method of delivery. The Contractor shall notify the Government (as part of the monthly report) MOS Program Office (COR and Government PM) of preferred delivery method being used and provide justification for this choice.

8.1.8 Event support is centrally approved and managed by the Government MOS Program Office and may consist of other Government initiatives. The events may consist of a staff person operating an exhibit booth with MOS materials and answering questions about the MOS Program, or only MOS materials being sent to support the event. The Government MOS Program Office (COR and Government PM) will review materials to be used at these events to ensure applicability with Participants.

8.2 FULFILLMENT INTERFACE

The Government maintains an online catalog and ordering application used to distribute informational and promotional materials to MOS Participants and service providers by mail. These items are housed and mailed by the Contractor. The offeror must be capable of receiving MOS client fulfillment requests originating from Government applications (reference Sections J-24 & 39).

8.3 FULFILLMENT REQUIREMENTS

8.3.1 The Data requests shall contain PII so protecting it is of paramount importance. All PII data communications between the Government and Contractor systems must be encrypted.

8.3.2 Communications shall be provided through a transaction based SOAP web service and an API provided by the Contractor that the Government can send the fulfillment requests to.

8.3.3 A monthly catalog file, in comma separated values (CSV) file format, shall be provided by the Contractor of the fulfillment materials being offered by the EAP Contractor. The data shall be included in the Government's online fulfillment catalog for ordering through the SOAP web service.

8.3.4 A monthly catalog file, in CSV file format, shall be provided by the Contractor of all fulfillment materials with the number in stock.

8.3.5 A monthly report, in CSV file format, shall be provided to the Government of all fulfillment requests processed (reference Section J-45).

9.0 JOINT FAMILY SUPPORT ASSISTANCE PROGRAM (JFSAP) OBJECTIVE

JFSAP teams serve Service members and families from all Components, who are geographically isolated from installation support and collaborate with existing family support resources to augment their activities and fill gaps where they exist. Services are delivered in local communities through collaborative partnerships with federal, state, and local entities, enhancing community capacity to serve military families.

9.1 MINIMUM REQUIREMENTS OF JOINT FAMILY SUPPORT ASSISTANCE PROGRAM

Contractor shall provide approximately fifty-five JFSAP consultants to states and territories to support increased outreach and coordination to geographically isolated service members and their families.

JFSAP consultants shall have, at a minimum, a Bachelor's degree from an accredited college program and three years of human services experience in a related field.

9.1.1 JFSAP consultants will travel throughout the state, as directed and approved by DoD, to assess needs for support services and form relationships with community service providers. The Contractor will inform DoD on the identified needs of military families in these states. JFSAP consultants will also support on-demand events, as directed and approved by the Government. The events may consist of a staff person operating an exhibit booth with MOS materials and answering questions about the MOS Program, or only MOS materials being sent to support the event. The Contractor will support up to 300 events, in person, or virtually, and provide materials for up to 80 events per month.

9.1.2 JFSAP consultants will collaborate with programs & services to build coalitions and connect Federal, state, and local resources and non-profit organizations to Active Duty, Guard and Reserve families (reference Section J-40). JFSAP consultants are prohibited from entering into any formalized agreements with Federal, state, local, military agencies, and non-profit organizations.

9.1.3 JFSAP consultants shall provide and document the following services and resources on a reporting form provided by the Government (reference Section J-41). JFSAP consultants, at a minimum, will:

- Provide service members and families with information and referrals.
- Develop and maintain a catalogue of Government approved family programs and support resources within each state. The Contractor shall provide the catalogue monthly to the Government electronically.
- Identify problems and/or gaps in services/resources; determine methods to fill gaps and enhance existing support systems' efforts in collaboration with MOS, DoD, State Joint Force HQ, and NGB Joint Force HQ Command, along with civilian community resources to enhance community capacity.
- Provide support for events to increase awareness of military community services, when requested and approved by the Government.
- Participate in and facilitate collaboration between military and civilian agencies to improve coordination.
- Provide briefings and share information that brings related groups together to build networks of volunteers, when approved by the Government.
- Provide support to unit/command and family support staff through briefings, information sharing, and training when approved by the Government.
- Contractor will provide IT equipment to facilitate daily operations and enable the JFSAP Consultant mobility to perform required work functions.

10.0 PROGRAM MANAGEMENT OBJECTIVE

To establish a program management team of key personnel to assure the consistent delivery of high quality services to Participants. Key personnel shall possess demonstrated knowledge and experience in dealing with military quality of life programs and services.

10.1 MINIMUM REQUIREMENTS FOR PROGRAM MANAGEMENT

The Contractor Program Management Team shall include, at a minimum, the following key personnel:

- Program Director or Manager with the authority to speak and act on behalf of the Contractor with DoD and to work directly with the CO, COR and Government PM.
- Deputy Program Director or Manager to assist the Program Director or Manager in managing this contract and able to act in the absence of the Program Director or Manager.

- Director of Call Center Operations.
- Director of non-medical counseling who will be responsible for overseeing all non-medical counseling, financial counseling, and health and wellness coaching programs.
- Director of Quality Control who will ensure that all of the quality assurance programs, metrics, reports and data are gathered, managed and reported within contract standards and will be responsible for ensuring compliance with credentialing and training of all personnel.
- Director of IT/Communication Resources responsible for all information technologies and communication resources deployed under and for this PWS.
- Information Security Manager responsible for the implementation, management, security and availability of all Contractor computer equipment and personnel. This position will be responsible for Information Assurance (IA) related training, operational procedures, documentation and business processes required to obtain and retain official accreditation of the online resources by full compliance of DoD Information Assurance Certification and Accreditation Process (DIACAP). This position requires DoD 8570.01 – M – IAM Level II qualification.
- Financial Manager who shall possess, at minimum, a Bachelor's degree and three years experience managing financial activities related to Government contracts for a commercial vendor.
- Contract Administrator who shall possess, at minimum, a Bachelor's degree and five years experience administering Government contracts for a commercial vendor.
- Subcontractor Manager responsible for all subcontracted work performed under this PWS.

The Government requires the following Key Personnel to be 100% dedicated to MOS:

- Program Director or Manager
- Deputy Program Director or Manager
- Director of Call Center Operations
- Director of Non-Medical Counseling
- Director of Quality Control

10.1.1 Contractor services shall include recruiting, hiring, training and managing a professional staff which maximizes employment of military spouses, Wounded Warriors and veterans. This staff will provide expert consultation and education on a wide array of topics including the establishment of business applications; interpreter and translation services; back-up operations and surge handling; developing the technological infrastructure necessary to operate a call center; and refreshing the technology used to maintain it state-of-the-art.

10.1.2 The Contractor shall develop and maintain a training program and methodology, reviewed and approved by the Government, to ensure staff members remain proficient on military services specific issues and understand military terminology, scope of services of the MOS program, and the issues facing Service men and women and their dependents.

10.1.3 The Contractor shall develop and maintain internal business processes, tools and technical expertise to integrate all elements of the MOS requirements to support and maintain a system of counselors and support staff at a level of readiness over the contract's period of performance.

- The Contractor shall develop and maintain processes and procedures to support the warm hand-off of Participants to other counselors and/or community resources.
- The Contractor shall develop and maintain management processes and procedures to provide

services to Participants worldwide.

- The Contractor shall develop and maintain management processes to provide back up Call Center support.
- The Contractor shall develop and maintain established management processes and procedures to meet peak usage periods and manage spikes in call volume.

10.1.4 No formal written modifications of processes, policies or procedures can be implemented without written acknowledgement from the Government MOS Program Office (COR and Government PM). All program adjustments or changes in work flow for MOS non-medical counseling must be discussed with and approved in writing by the COR and CO.

10.1.5 The Contractor shall adhere to Government provided policies and procedures for each type of service delivery (reference Section J).

10.1.6 The Contractor shall develop and maintain a management process to meet Section 508 of the Workforce Investment Act of 1998 and all DoD security requirements as applicable.

10.1.7 The Contractor shall comply with the DoD Directives and Instructions, to include all future updates, referenced in Section J.

10.1.8 The Contractor will be required to work collaboratively with the Government and other Government Contractors to present a unified, cohesive effort in delivering EAP services to Participants, to include roundtable meetings with the Government as directed.

10.1.9 The Contractor shall remain free of any political bias and shall ensure consistency of service regardless of installation, location, or any other factor.

10.1.10 MOS contract staff and network providers, health and wellness coaches, and financial counselors are not authorized to speak to the media/press regarding MOS or their work with MOS Participants without specific written approval from the Government MOS Program Office (COR and Government PM). All media/press inquiries should be forwarded via Contractor to the Government MOS Program Office (COR and Government PM). MOS staff and network providers, health and wellness coaches, and financial counselors shall not engage in political discussions with Participants concerning military policy as they must remain focused on providing support. MOS staff and network providers, health and wellness coaches and financial counselors will not represent the Government at any federal, state, or military meeting or event.

10.1.11 The Contractor must establish and maintain a customer-service atmosphere of respect and concern for every Service member or family member, regardless of grade/rank, race, color, national origin, sex, religion, age, or disability IAW guidance issued by DOJ, DHHS, DOL, and the Small Business Administration (SBA).

10.1.12 The Contractor shall provide quarterly updates on the performance plan related to the Quality Assurance Surveillance Plan (QASP).

10.2 TRAINING

The Contractor shall develop and maintain a training program and methodology to ensure MOS Call Center staff, non-medical counselors and network providers, health and wellness coaches and financial counselors are current on military service specific issues, understand military terminology and are familiar with evolving issues that affect military members and their families.

10.2.1 The Government will provide initial training for utilization of the Government CMS in a curriculum that can be provided in a “train the trainer” format. Ongoing virtual training will be available thereafter.

10.2.2 All training pertaining to the MOS Program must be reviewed and approved by the Government MOS Program Office prior to utilization of the training program or module. This training program shall pertain specifically to the military population, be provided within 15 days of hire and include, but not be limited to:

- Services and support provided by MOS to Participants.
- Military lifestyle and sensitivity.
- Military programs and benefits, to include but not limited to: Morale Welfare and Recreation (MWR) information, shopping services (commissary and post exchange locations), special needs services for children and adults, referrals for substance abuse and mental health counseling to MTF, referrals to TRICARE, Wounded Warrior support, Thrift Savings Plan (TSP), Savings Deposit Program (SDP), and Service members' Group Life Insurance (SGLI).
- Standardized training and guidance on each service component to include: Army, Navy, Air Force, Marine Corps, Coast Guard, Army National Guard, Army Reserve, Air National Guard, Air Force Reserve, Marine Corp Reserve, and Naval Reserve.
- Restricted Reporting, Mandated Reports and Duty to Warn Reports and protocols (reference Sections J-12, 13, 14, 15 & 30). This training must cover guidance, policies and procedures provided by the Government and business processes related to protocols created by the Contractor and approved in writing by the Government. Training must also include FAP procedures and protocols as well as other service entities with which they may come in contact regarding a Restricted Reporting referral, Mandated Report or a Duty to Warn (reference Section J-12).
- Guidance for MOS staff, Call Center and non-medical counselors in the event of a disaster (reference Section J-10).
- Deployment and reintegration.
- Evidence-based care for assessment, management and intervention of suicide-related behavior.
- Specialty consultations provided through the MOS Program.
- Non-medical counseling and scope of care. Scope of care is limited to specific V-codes (reference Section J-32). There is a prohibition on providing clinical mental health counseling, treatment and/or therapy, or substance abuse treatment (reference Section J-42). Training will include a screening process for scope of care.
- Warm hand-offs and the referral process (reference Sections J-28 & 29).
- Required MOS documents such as Case Records, Case Notes and Case Closure; utilization of V-codes and referral to a clinical mental health counseling provider including submission deadlines and methodology (reference Sections J-3 & 32).
- Federal Information Systems Security (ISS) Awareness for non-DoD personnel: <http://iase.disa.mil/eta/>
- PII: <http://iase.disa.mil/eta/>
- Reporting Adverse Incidents (reference Section J-31).

10.2.3 The Contractor shall design and implement a method for regularly updating personnel on current/emerging issues pertaining to military life. The Contractor, MOS staff and network providers shall be familiar with evolving issues that affect military members and their families.

10.2.4 All required training, including vendor specific subject matter tests, must be completed successfully **prior to** being referred to or working with a MOS Participant. Training must be renewed on an annual basis.

10.2.5 The Contractor shall annually certify and be able to demonstrate to the Government MOS Program Office or CO, at any time in writing, that the MOS staff, supervisors, non-medical counseling network providers, health and wellness coaches, and financial counselors have comprehensive/current knowledge of their respective disciplines, military culture and lifestyle training, scope of care for non-medical counseling, current issues affecting military families, such as relocation, separation, and deployments, and all requirements of this contract.

10.2.6 The Contractor shall annually verify the credentials of the non-medical counselor staff and network providers to include non-medical counseling supervisory staff and will demonstrate to the Government MOS Program Office or the CO, at any time in writing, and will provide documentation that verification was performed.

10.2.7 The Contractor shall update training when appropriate and such will be approved by the Government to ensure that any changes to instructions, protocols, procedures, programs and services are accurately reflected and are current. The Contractor shall provide updated training in the event there is a significant change in programming and/or DoD Instructions.

10.3 MONTHLY REPORTS OBJECTIVE

The Government requires detailed monthly MOS reports that include data analysis and trends of program utilization, quality assurance, evidence of program effectiveness and successful participant outcomes. Accurate details of utilization and quality metrics will allow the DoD and Military Services to redirect and refocus program and contract efforts to target Participant needs as required.

10.4 MINIMUM REQUIREMENTS FOR MONTHLY REPORTS

The Contractor shall deliver monthly, a Contracting Report and a Financial Disbursement Report. Submission shall be due beginning on the 15th of the month following the first month of full performance and on the 15th of each month thereafter throughout the period of performance. Submissions of reports shall be in Microsoft (Word or Excel) format and sent via e-mail.

10.4.1 The Government will have ten business days for review and acceptance/rejection of the monthly contracting and financial disbursement reports.

10.4.2 In the event that the Government rejects either of these reports, completely or in part, the Contractor will have ten business days to resubmit the report to the Government.

10.4.3 The Contractor shall capture and report all Participant contacts by Military Service and installation, Service member or family member, to include Guard and Reserve, on a monthly basis. A complete list of the current military installations can be found at the following link: <http://www.militaryinstallations.dod.mil>

10.4.4 Required Data in Reports – The monthly reports shall include, but will not be limited to: (reference Sections J-4 & 45).

10.4.5 The Contractor will also submit a report, including totals of all reporting requirements listed above, not later than 60 days after the end of each option period.

10.4.6 In addition to the monthly reports, the Contractor will deliver ad-hoc reports to the Government MOS Program Office as required. These ad-hoc reports often have very short suspense times and average three to five per month.

10.4.7 The Contractor shall provide all Government documents and intellectual property, to include all CMS cumulative data, in an .xml format within 15 days of contract completion.

10.5 QUALITY CONTROL OBJECTIVE

To ensure MOS Participants receive the highest quality services possible.

10.6 MINIMUM REQUIREMENTS FOR QUALITY CONTROL

The Contractor shall develop, implement and maintain a Quality Control Plan for MOS operations.

10.6.1 The Contractor shall identify, within the Quality Control Plan, the measures necessary for monitoring performance for all MOS operations to meet minimum standards in the QASP.

10.6.2 The Contractor shall maintain and provide all records and reports pertaining to quality assurance documentation for the life of this contract, and make them available for Government review at any time during performance.

10.6.3 The Contractor shall collect service delivery information focusing on key quality factors, to include but not limited to: appropriateness; effectiveness; successful outcomes and any or all of the dimensions of quality such as: accessibility; availability; efficiency; continuity; safety; timeliness; and respectfulness.

10.6.4 The Contractor shall review several sources of information to identify patterns and trends, including: Case record review reports; quarterly review of incidents, accidents, and grievances; customer satisfaction data, customer outcomes data, and management and operations data and reports.

10.6.5 The Contractor shall be able to demonstrate (at any time) to the Government MOS Program Office (COR and Government PM) or the CO, in writing, that the MOS staff and network providers, health and wellness coaches, and financial counselors are providing appropriate support to Service members and their families.

10.6.6 The Quality Control Plan for all non-medical counseling for MOS will meet, at a minimum, a level consistent with the COA Performance and Quality Improvement (PQI) standards. Although accreditation with the COA is not a requirement of this contract, the quality assurance guidelines for the COA for EAP services should be met at a minimum (reference Section J-5ee).

10.6.7 The Contractor shall conduct reviews of case records for non-medical counseling to evaluate the presence, clarity, quality and continuity of required documents using uniform forms to ensure consistency; it shall also include a random sample of both open and closed cases. The Contractor shall provide a plan and method to review case records objectively, avoiding conflict of interest and including a case record review form that defines and tracks vital documents and elements. Documents included in the case record review may include: assessments; service plans; appropriate consents; progress or case notes or summaries or case closure summaries; evidence of quarterly case supervision if required; relevant signatures; and service outcomes. The Contractor shall review one or two quality issues that assess appropriateness, need for, and effectiveness of services. Criteria for assessing quality issues such as appropriateness, need for, and effectiveness of services can include: services needed and provided or obtained; length of service; changes in status or level of service; need for continued service; compliance with mandated review indicators; and timeframes. The Government has provided a benchmark for sampling for case record reviews to identify trends and patterns following guidelines based on an annual number of case records that meets the minimum standards recommended by the COA (reference Sections J-4 & 5ee). COA guidance for sample size shall be followed. The Contractor may identify and propose a developed methodology identifying sample size, confidence levels, size of the network, number of providers providing MOS non-medical counseling services, trends and patterns, to include open and closed cases. This methodology must be approved by the COR and Government PM prior to implementation on this Contract.

10.6.8 All cases identified as an adverse incident shall be reviewed for quality assurance and risk management by the Contractor and the MOS Program Office (COR and Government PM) (reference Section J-31).

10.6.9 The Contractor shall provide PQI standards to include the use of data to identify areas of needed improvement and implement improvement plans in support of achieving performance targets, program goals, Participant satisfaction, and positive Participant outcome. The plan will integrate the findings of external review

processes, including licensing reviews, information related to compliance with federal, state, and department requirements, Governmental audits, accreditation, and other reviews into its PQI process, where appropriate. The plan shall include an inclusive approach to establishing measured performance goals, Participant outcomes, indicators, and sources of data that ensure broad-based support for useful performance and outcomes measurement.

10.7 CASE MANAGEMENT OBJECTIVE

The Government will provide the Contractor a CMS (reference Section J-43) to collect and maintain MOS Participant information. The CMS will be used by multiple programs requiring individual Participant information tracking as designated by the Government. The contractor will be expected to report data outside the CMS system. The contractor will not be expected to load their provider network into the Government CMS. This online application is accessed and used by all authorized Government personnel and their contracted representatives. This system shall be operated and maintained through a separate contract.

10.8 CASE MANAGEMENT SYSTEM ACCESS REQUIREMENTS

10.8.1 All communications to and from the CMS will use encrypted communication protocols between the CMS hosts and the end user terminals (Hypertext Transfer Protocol Secure (HTTPS)) (reference Section J-20). The CMS demo can be found at the following link: <http://MCFPCMS.Demo.defenseweb.com>

10.8.2 All communications to the CMS will be IAW DoDD 8500.1 and DoDI 8500.2 compliant hosts, computers or terminals (reference Sections J-5q and J-5x).

10.8.3 All users of the CMS must obtain and maintain a valid DoD approved External Certification Authority (ECA) user certificate or maintain a DoD compliant user id and password <http://iase.disa.mil/pki/eca/index.html>

10.8.4 The Contractor shall provide the number and role of users that will require access to the Government CMS (reference Section J-20).

10.9 INFORMATION TECHNOLOGY (IT) AND INFORMATION ASSURANCE (IA) SERVICES

The Contractor shall provide expert level IT & IA support to establish, maintain, and enhance a robust, DISA/DoD compliant IA capability. The scope of this IA support shall include IA Project Management, Risk and Compliance Management, DIACAP Compliant Certification and Accreditation (C&A), Vulnerability Analysis, Assessment and Reporting, Security Engineering and Integration, and Security Incident Response.

10.9.1 Contractor must submit to the Government written full risk assessments before modifications are deployed on systems and applications used for MOS.

10.9.2 Establish DIACAP compliant C&A packages on all Contractor systems at a mission assurance category (MAC) level Three and confidentiality level (CL) of Sensitive.

10.9.3 Establish a robust vulnerability management capability that ensures standardized vulnerability testing, analysis, and reporting.

10.9.4 Provide an Incident Response capability that follows required reporting requirements and quickly isolates, investigates, and remediates security incidents.

10.9.5 The Contractor shall meet all IA requirements IAW the most current DoD 8500 series of instructions. The Contractor shall deliver compliant, applicable IA controls as listed in DoDI 8510.01 (reference Section J-5y).

10.9.6 The Contractor shall provide personnel appropriately certified to support the IA functions they perform IAW DoDD 8570.01 (reference Section J-5z).

10.9.7 The Contractor shall meet all IA requirements as defined in the DISA Secure Technical Implementation Guidance (STIGs) except as authorized in writing by the Designated Accrediting Authority (DAA).

10.9.8 The Contractor must demonstrate they possess the knowledge and resources to achieve an Interim Authority to Operate (IATO) within 120 days of award. The full Authority to Operate (ATO) is required within 180 days of the date the IATO was issued.

11.0 RETURN TO OPERATION (RTO) / DISASTER CONTINUITY OF SERVICES

11.0.1 The Contractor's EAP web presence must meet a Return to Operation (RTO) of 24 hours for any catastrophic disaster or service interruptions.

11.0.2 The Government CMS application has a RTO of 24 hours for any catastrophic disaster or service interruptions. During all service interruptions, the Call Center and client information that should be entered into the CMS will be gathered by an alternate procedure and entered into the CMS after RTO.

11.0.3 The Call Center phone system must meet a RTO of 5 seconds or less for any catastrophic disaster or service interruptions.

11.0.4 In the event of a disaster, either natural or man-made, the Contractor shall be able to maintain normal Call Center operations with no loss of data.

11.0.5 The Contractor shall demonstrate capability for continuity of services to include redundancies for all MOS Call Center operations and systems.

11.0.6 Contractor shall develop and implement procedures to address organizational policy to prevent loss of the Call Center services caused by disasters (reference Section J-10).

11.0.7 Contractor shall develop a test plan and execute it at least annually to ensure complete system shutdown is avoided and all MOS Call Center services remain available throughout any disaster or crisis situation.

11.0.8 The Contractor shall describe the company's current disaster continuity of services plan, which will include when it was last tested and type of testing performed.

11.0.9 The Contractor's disaster continuity of services procedures provide no down time and no loss of data.

11.0.10 The Contractor shall provide sufficient security to protect the confidentiality, integrity, and availability of the data IAW all applicable federal laws, regulations, policies, and industry standards. Formal incident response, vulnerability monitoring and risk mitigation procedures will be documented and exercised annually.

11.0.11 Annual third party security assessments will be performed to ensure the ongoing effectiveness of the IA programs and shall be provided to the COR. This will typically be a security organization or company selected and paid for by the Contractor.

11.0.12 Contractor shall ensure all data collection and storage systems provided for DoD information adhere to all applicable Federal Laws, DoD regulations and policies, State laws, and industry standards.

11.0.13 Contractor shall ensure that all electronic data collection and storage systems are designed with access controls, comprehensive intrusion detection, and virus protection.

11.0.14 All Contractor users with root access (console/terminal access) to any equipment or applications belonging to or used by the MOS project must be US Citizens.

11.1 ALL CONTRACTOR USERS WITH ACCESS TO VIEW OR MANIPULATE MOS DATA SHALL COMPLETE ANNUAL IA AND PII TRAINING

11.1.1 Federal Information Systems Security (ISS) Awareness (for non-DoD Personnel) <http://iase.disa.mil/eta/>

11.1.2 PII: <http://iase.disa.mil/eta/>

11.1.3 A monthly user report shall be provided to the Government IA Manager (IAM) for all users of the MOS CMS with the date each course was completed. This will be in spreadsheet format.

11.2 DATA USE, DISCLOSURE OF INFORMATION AND HANDLING OF SENSITIVE INFORMATION

The Contractor shall maintain, transmit, retain in strictest confidence, and prevent the unauthorized duplication, use, and disclosure of sensitive information. The Contractor shall provide information only to employees, Contractors, and subcontractors having a need to know such information in the performance of their duties for this project.

11.2.1 Anything 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 agreement of the CO.

11.2.2 If public information is provided to the Contractor for use in performance or administration of this effort, the Contractor, except with the written permission of the CO, may not use such information for any other purpose. If the Contractor is uncertain about the availability or proposed use of information provided for the performance or administration, the Contractor shall consult with the CO and COR regarding use of that information for other purposes.

11.2.3 The Contractor agrees to assume responsibility for protecting the confidentiality of Government records which are not public information. Each officer or employee of the Contractor 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 a purpose and to the extent authorized herein.

11.2.4 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 adverse to the interests of the Government and/or others.

11.2.5 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 as authorized by Government personnel or upon written approval from the CO. 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 and as directed by the COR.

11.2.6 Under the provisions of the Rights in Data General Clause (52.227-14), all data received, processed, evaluated, loaded, and/or created as a result of this contract shall remain the sole property of the Government. The Government reserves all rights, including copyrights, distribution rights, and other rights for all documents, data or software developed in the performance of this contract.

11.3 MILITARY ONESOURCE PROGRAM TRANSITION

The Contractor shall provide a plan that defines the Contractor's capacity and capability for an orderly and seamless transition for the delivery of the MOS Program to be operational not later than 90 days after contract award.

11.3.1 Contractor shall design an interface to connect their existing commercial EAP services with the Government MOS website.

11.3.2 The Transition Plan shall discuss the process for transferring services, including open cases, and associated data.

11.3.3 Call Center shall respond to 100% of incoming calls at 91 days after contract award.

11.3.4 At the end of the 90-day transition-in period, Quality Assurance metrics will be met and all Government Furnished Information and Government Furnished Property will be transferred and fully integrated into the MOS Program.

11.3.5 Content of Education and Information materials (for Participant download or mailing) will be available for DoD review no later than 90 days after contract award.

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

11.3.7 The Contractor shall obtain necessary ECAs (reference Section J-3), as needed, for MOS JFSAP consultants.

11.3.8 The Contractor shall deliver a project plan and timeline to achieve an IATO within 120 days of award. The full ATO is required within 180 days of the date the IATO was issued.

11.3.9 Transition Reporting Requirements – Every week, the Contractor shall provide a report, in Contractor format, detailing the status of implementation milestones for Call Center, reports, disaster recovery, general EAP education/information materials, specialty consultations, all non-medical counseling services, financial counseling, health and wellness coaching, and all program oversight elements to include status of sub-contracts.

11.3.10 The Contractor's program management structure, organization, and facilities shall be in place and fully operational at the end of the 90 day transition in period. At completion of the transition in period, the Contractor shall have responsibility for all requirements covered under this contract. During transition in, a face to face meeting will take place monthly, or more frequently, at the CO's location in Herndon, Virginia.