ID	Task Name	% Work Complete	Responsible Party	Task Dependency	Duration	Final Deliverable	February 1/20	1/27	2/3	2/10
1	**MOS Transition Out Plan**	0%			**90 days**					
2	**Project Administration**	0%			**5 days**					
3	Contract award notification provided to vendo	0%	DoI	Action required by Govt.	1 day	Award Notifcation		◆ 2/1		
4	Review submitted Transition Out plan with CC	0%	MC&FP	Action required by Govt.	1 day					
5	Receive edits or approval on Transition Out p	0%	ValueOptions/MC&FP	Action required by Govt.	5 days					
6	Discuss and receive approval on plan for interface with new vendor	0%	ValueOptions/MC&FP	Input required from Govt.	5 days					
7	Determine process for scheduling dates and times for face to face transition meetings (as	0%	ValueOptions/MC&FP	Input required from Govt.	1 day					
8	**Transition Out Travel**	0%			**5 days**					
9	Review project travel expectations for the support of operational close-out activities.	0%	ValueOptions		5 days					
10	Communicate travel protocols to project team	0%	ValueOptions		5 days					
11	**Transition Out Quality Assurance Measures**	0%			**5 days**					
12	Review current list of quality assurance measures the COTR may use to monitor the Contractor and New Vendor performance in conducting the Transition Out to ensure the list covers all new requirements	0%	ValueOptions		3 days					
13	Review recommended quality assurance measures with COTR	0%	ValueOptions/MC&FP	Input required from Govt.	1 day					
14	Receive edits or approval on list of quality ass	0%	ValueOptions/MC&FP	Action required by Govt.	5 days					
15	Incorporate quality assurance measures into overall Transition Out process	0%	ValueOptions/New Vendor	Inpunt required from new vendor and the Govt.	1 day					
16	**Risk Mitigation**	0%			**5 days**					

Task	▬▬▬	External Tasks	▬▬▬	Manual Task	▭▭▭	Finish-only	⊐
Split	··············	External Milestone	◆	Duration-only	▬▬▬	Deadline	↓
Milestone	◆	Inactive Task	▭▭▭	Manual Summary Rollup	▬▬▬	Progress	▬▬▬
Summary	▶▬▬◀	Inactive Milestone	◇	Manual Summary	▶▬▬◀		
Project Summary	▼▬▬▼	Inactive Summary	▭▭▭	Start-only	⊏		

Project: Draft MOS Transition Out
Date: Thu 1/17/13

ID	Task Name	% Work Complete	Responsible Party	Task Dependency	Duration	Final Deliverable	February			
							1/20	1/27	2/3	2/10
17	Develop list of potential transition out risk factors for review with COTR	0%	ValueOptions		3 days					
18	Provide risk mitigation plan that addresses identified risks for review	0%	ValueOptions/MC&FP	Input required from the Govt.	1 day					
19	Receive edits or approval for risk mitigation plan	0%	ValueOptions/MC&FP	Action required by the Govt.	5 days					
20	Implement, monitor and report to COTR on the progress of any risk mitigation plans	0%	ValueOptions		1 day					
21	**Transition Out Reporting**	**0%**			**30 days**					
22	Discuss the provision of transition status reports to COTR (every two weeks)	0%	ValueOptions/MC&FP	Input requried from the Govt.	1 day					
23	Confirm format for reports	0%	ValueOptions/MC&FP	Input requried from the Govt.	1 day					
24	Review recommend content to be included in report	0%	ValueOptions/MC&FP	Input requried from the Govt.	1 day					
25	ValueOptions will submit transition out reports to the Government on agreed upon	0%	ValueOptions		30 days	Transition Out Report Package				
26	**Internal Planning and Workgroup Meetings**	**0%**			**3 days**					
27	Establish project workgroup teams	0%	ValueOptions		1 day					
28	Provide overview of Transition Out specifics to project team	0%	ValueOptions		1 day					
29	Refine and finalize Transition Out deliverables list	0%	ValueOptions		3 days					
30	Begin weekly implementation meetings with project team	0%	ValueOptions		1 day	Recurring appointment				
31	**Interface and Transition Planning with New Vendor**	**0%**			**5 days**					
32	Develop schedule for face to face and telephonic meetings with new vendor	0%	ValueOptions/MC&FP/New Vendor	Action requried by the Govt. and the New Vendor	5 days					

	Task	▬▬▬▬	External Tasks	▬▬▬▬	Manual Task	▭▭▭	Finish-only	⌐
	Split	··············	External Milestone	◆	Duration-only	▭▭▭	Deadline	↓
Project: Draft MOS Transition Out **Date: Thu 1/17/13**	Milestone	◆	Inactive Task	▭▭▭	Manual Summary Rollup	▭▭▭▭	Progress	▬▬▬
	Summary	▬▬▬	Inactive Milestone	◇	Manual Summary	▬▬▬		
	Project Summary	▭▭▭	Inactive Summary	▭▭▭	Start-only	⌐		

ID	Task Name	% Work Complete	Responsible Party	Task Dependency	Duration	Final Deliverable	February 1/20	1/27	2/3	2/10
33	Hold initial interface meeting with new vendor and review COTR approved interface plan	0%	ValueOptions/MC&FP/New Vendor	Requires completion of task #6 and Action requried by the Govt. and the New Vendor	1 day					
34	Review, refine and agree on Joint Transition Out Deliverable List	0%	ValueOptions/New Vendor	Action requried by the Govt. and the New Vendor	3 days					
35	Review, refine and agree on Joint Transition Out Timeline for cutting over all aspects of the program	0%	ValueOptions/New Vendor	Action requried by the Govt. and the New Vendor	3 days					
36	Review, refine and agree on Joint Transition Out Project Plan	0%	ValueOptions/New Vendor	Requires completion of task #5 and Action requried by the Govt. and the New Vendor	3 days					
37	Review, refine and agree on Joint designation of and Responsible Parties for each organization	0%	ValueOptions/New Vendor	Action requried by the Govt. and the New Vendor	3 days					
38	Schedule and hold additional joint transition meetings, as necessary	0%	ValueOptions/New Vendor	Action requried by the Govt. and the New Vendor	1 day					
39	**Communications Plan**	**0%**			**10 days**					
40	ValueOptions and New Vendor to meet with COTR to determine overall communications strategy and incorporate key communication timelines into planning	0%	ValueOptions/MC&FP/New Vendor	Action requried by the Govt. and the New Vendor	1 day					
41	ValueOptions to provide MC&FP with any content required for communications	0%	ValueOptions		10 days					
42	**Continued Operational Support During Transition**	**0%**			**5 days**					
43	Develop plan for ensuring continued operational support across all accepts of the MOS program during transition to new vendor	0%	ValueOptions		5 days					

Task	▬▬▬	External Tasks	▬▬▬	Manual Task	▭▭▭	Finish-only	⌐	
Split	··············	External Milestone	◆	Duration-only	▬▬▬	Deadline	⬇	
Milestone	◆	Inactive Task	▭▭▭	Manual Summary Rollup	▭▭▭	Progress	▬▬▬	
Summary	▬▬▬	Inactive Milestone	◇	Manual Summary	▬▬▬			
Project Summary	▬▬▬	Inactive Summary	▭▭▭	Start-only	⌐			

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ID	Task Name	% Work Complete	Responsible Party	Task Dependency	Duration	Final Deliverable	February 1/20	1/27	2/3	2/10
44	Develop plan for phasing out operational support in concert with the transition over to new vendor	0%	ValueOptions	Input from New Vendor and the Govt.	5 days					
45	Develop retention and severance plans to ensure maintenance of necessary staffing levels	0%	ValueOptions		5 days					
46	**Overall Operational Close Out**	**0%**			**45 days**					
47	Program Director and Deputy will oversee the close out of various functional and operational area	0%	ValueOptions		30 days					
48	Administrative Assistants will assist with a variety of support related to closing the office, organizing reports, papers, filing, packing up materials, preparing items for shipping, assisting with inventory, and other administrative duties	0%	ValueOptions		30 days					
49	General administrative services to be discontinued: Postage Machines Copy machines Cell Phones, Air Cards and Wireless Devices ECA Certificates	0%	ValueOptions		45 days					
50	**Call Center**	**0%**			**45 days**					
51	Meet with new vendor to discuss requirements for initiating paperwork to transition national and international toll free numbers	0%	ValueOptions/New Vendor	Action required by New Vendor.	45 days					
52	Collaborate with incoming vendor to develop schedule for testing cut-over for toll free number	0%	ValueOptions/New Vendor	Action required by New Vendor.	15 days					
53	Collaborate with incoming vendor to develop schedule for cut-over date and time for toll free number	0%	ValueOptions/New Vendor	Action required by New Vendor.	15 days					

Task	▬▬▬	External Tasks	▬▬▬	Manual Task	▭▭▭	Finish-only	⌐
Split	·············	External Milestone	◆	Duration-only	▬▬▬	Deadline	⬇
Milestone	◆	Inactive Task	▭▭▭	Manual Summary Rollup	▬▬▬	Progress	▬▬▬
Summary	▬▬▬	Inactive Milestone	◇	Manual Summary	▬▬▬		
Project Summary	▬▬▬	Inactive Summary	▭▭▭	Start-only	C		

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ID	Task Name	% Work Complete	Responsible Party	Task Dependency	Duration	Final Deliverable	February 1/20	1/27	2/3	2/10
54	Calls will cut over to new vendor as of 12:01am on transition date	0%	ValueOptions/New Vendor		1 day					
55	Develop plan to ensure that all open inquires and items for all call center staff are completed prior to transition date	0%	ValueOptions		30 days					
56	Develop list of all call center related policies and procedures and determine transition	0%	ValueOptions		45 days	Inventory Document				
57	**Fulfillment**	**0%**			**45 days**					
58	Prepare an inventory list of government-owned fulfillment items	0%	ValueOptions		15 days	Inventory Document				
59	Determine plan for transitioning all government-owned educational and promotional materials to the new vendor	0%	ValueOptions/New Vendor	Input required from the New Vendor and the Govt.	30 days					
60	Assist with communication, coordination with service providers	0%	ValueOptions/New Vendor	Input requried from New Vendor.	45 days					
61	Determine the cut-off date for member and service provider fulfillment orders	0%	ValueOptions		5 days					
62	Communicate the cut-off date for final orders	0%	ValueOptions		1 day	Mailin and Email Communication				
63	Determine schedule to shut-down the MOS fulfillment	0%	ValueOptions	Input needed from Warehousing Service Vendor.	15 days					
64	Develop plan and timeline to pull all inventory off shelves	0%	ValueOptions		15 days					
65	Schedule packing of all materials for loading on freight trucks	0%	ValueOptions		15 days					
66	Establish delivery schedule for shipment to new vendor	0%	ValueOptions		15 days					
67	**Non-Medical Counseling**	**0%**			**45 days**					
68	Conduct follow up with providers regarding transition	0%	ValueOptions	Input needed from Network Provider	30 days					

Project: Draft MOS Transition Out Date: Thu 1/17/13	Task	▬▬▬	External Tasks	▬▬▬	Manual Task	▭	Finish-only ⌐
	Split	··············	External Milestone	◆	Duration-only		Deadline ⬇
	Milestone	◆	Inactive Task	▭	Manual Summary Rollup ▭▭▭	Progress ▬▬▬
	Summary	▬▬▬	Inactive Milestone	◇	Manual Summary ▬▬▬	
	Project Summary	▭▭▭	Inactive Summary	▽▽	Start-only ⌐	

ID	Task Name	% Work Complete	Responsible Party	Task Dependency	Duration	Final Deliverable	February 1/20	1/27	2/3	2/10
69	Provide support in closing out all remaining cases and assuring appropriate transition. Per EAP industry standards, all cases initiated with ValueOptions staff will continue with ValueOptions until the case is	0%	ValueOptions		45 days					
70	Develop plan for responding to providers questions regarding transition	0%	ValueOptions		30 days					
71	Develop list of all non –medical counseling policies and procedures and determine transition plan	0%	ValueOptions		30 days					
72	Determine whether coaching cases should remain with VO coaches or transition to new vendor's coaches.	0%	ValueOptions	Input required from Govt and New Vendor	30 days					
73	**Subcontractor Services**	**0%**			**45 days**					
74	Develop plan for transitioning all current subcontractor services, including: Worklife services Financial and Tax telephonic and online counseling Face to Face financial counseling Translation Services Fulfillment services Strategic outreach properties	0%	ValueOptions		45 days					
75	Review open cases (if applicable) and develop plan for transitioning all services, as necessary	0%	ValueOptions		45 days					
76	Develop plans for transfer of data for all services and materials, as necessary	0%	ValueOptions/New Vendor	Input requried from New Vendor and the Govt.	45 days					
77	**Finance**	**0%**			**45 days**					
78	Develop plan to complete all final billings, including the Transition Out billings and invoices to the Government	0%	ValueOptions		45 days					

Task	▬▬▬	External Tasks	▬▬▬	Manual Task	▭▭▭	Finish-only	]
Split	··············	External Milestone	◆	Duration-only		Deadline	⬇
Milestone	◆	Inactive Task	▭▭▭	Manual Summary Rollup	▬▬▬▬	Progress	▬▬▬
Summary	▬▬▬	Inactive Milestone	◇	Manual Summary	▬▬▬		
Project Summary	▬▬▬	Inactive Summary	▽▽▽	Start-only	[		

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ID	Task Name	% Work Complete	Responsible Party	Task Dependency	Duration	Final Deliverable	February 1/20	1/27	2/3	2/10
79	Develop plan to handle payment of vendor invoices, termination of agreements with vendors, final financial accounting and record keeping	0%	ValueOptions		45 days					
80	Develop schedule to produce the final Contract Fund Status Reporting and Financial Disbursement Reporting to the Government.	0%	ValueOptions	Input required from Govt.	45 days					
81	**Human Resources**	**0%**			**75 days**					
82	Develop plan for severance and retention packages	0%	ValueOptions		30 days					
83	Develop plan for any labor relations issues prompted by the transition	0%	ValueOptions		60 days					
84	Work with new vendor to determine process for interviewing and potentially onboarding current staff	0%	ValueOptions/New Vendor	Input requried from New Vendor.	75 days	Staff Transition Plan				
85	**Information Technology**	**0%**			**75 days**					
86	Data Center	0%			75 days					
87	Management and Decommissioning of MOS Secondary Data Center	0%	ValueOptions		75 days					
88	Decommissioning of MOS IBM midrange serve platform	0%	ValueOptions		75 days					
89	Decommissioning of MOS systems in the Reston, Virginia Data Center	0%	ValueOptions		75 days					
90	Prepare and provide a data extract of MOS Case Management System (Service CareConnect) System data	0%	ValueOptions		45 days					
91	Prepare and submit decommissioning documentation for the MOS Case Management System (Service CareConnect), per the DIACAP guidelines	0%	ValueOptions		15 days					

Project: Draft MOS Transition Out Date: Thu 1/17/13	Task		External Tasks		Manual Task	Finish-only
	Split		External Milestone		Duration-only	Deadline
	Milestone		Inactive Task		Manual Summary Rollup	Progress
	Summary		Inactive Milestone		Manual Summary	
	Project Summary		Inactive Summary		Start-only	

ID	Task Name	% Work Complete	Responsible Party	Task Dependency	Duration	Final Deliverable	February 1/20	1/27	2/3	2/10
92	**Website**	0%			75 days					
93	Decommissioning of MOS EAP Website in accordance with DIACAP requirements	0%	ValueOptions		75 days					
94	Transition of MOS-related Domain Names and URLs	0%	ValueOptions/New Vendor	Input and Action required by New Vendor	45 days					
95	Prepare a list of MOS Email addresses for the transition	0%	ValueOptions		30 days					
96	Prepare and provide a data extract of MOS EAP Website user accounts	0%	ValueOptions/New Vendor	Input and Action required by New Vendor	45 days					
97	Prepare and submit decommissioning documentation for the MOS EAP Website, per the DIACAP guidelines	0%	ValueOptions		15 days					
98	**Decommission of Arlington and Chesapeake Call Centers**	0%			30 days					
99	Decommission and relocation storage of PC, LAN/WAN equipment in Arlington and Chesapeake call centers	0%	ValueOptions		15 days					
100	Decommission of MOS Call Center	0%	ValueOptions	Cannot begin until task #99 has completed	30 days					
101	**Facilities**	**0%**			**60 days**					
102	Trigger early termination clauses for Arlington and Chesapeake office locations	0%	ValueOptions		30 days					
103	Review facility contracts for specific steps to initiate and finalize early terminations	0%	ValueOptions		30 days					
104	Develop plan for removal of furniture and equipment from both office locations	0%	ValueOptions		30 days					
105	Removal of voice/data cabling in the Arlington and Chesapeake call centers per EPA guidelines	0%	ValueOptions		60 days					

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Date: Thu 1/17/13

Task		External Tasks		Manual Task	Finish-only
Split		External Milestone	◆	Duration-only	Deadline
Milestone	◆	Inactive Task		Manual Summary Rollup	Progress
Summary		Inactive Milestone	◇	Manual Summary	
Project Summary		Inactive Summary		Start-only	

ID	Task Name	% Work Complete	Responsible Party	Task Dependency	Duration	Final Deliverable	February			
							1/20	1/27	2/3	2/10
106	**Specialty Services**	**0%**			**60 days**					
107	Develop plan for transition of all Specialty services	0%	ValueOptions/New Vendor	Input required from New Vendor and the Govt.	60 days					
108	Design process/plan for transitioning JFSAP staff and JFSAP policies and procedures.	0%	ValueOptions		30 days					
109	Develop plan for return of all equipment from JFSAP staff to VO (computers, cell phones, wireless cards, etc.)	0%	ValueOptions		30 days					
110	Collaborate with new vendor to determine appropriate coverage plan for events/presentations/community capacity	0%	ValueOptions/New Vendor	Input required from New Vendor and the Govt.	60 days					
111	Collaborate with new vendor to transition JFSAP team data.	0%	ValueOptions	Input requried from New Vendor and Govt.	30 days					
112	Identify process for releasing Outreach Assistant contract staff	0%	ValueOptions		60 days					
113	**Training/Orientation**	**0%**			**30 days**					
114	Discuss provision of overviews/trainings for new vendor staff	0%	ValueOptions/New Vendor	Inpur required from Govt.	15 days					
115	If requested, schedule sessions prior to transition date	0%	ValueOptions/New Vendor		30 days					

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Task		External Tasks		Manual Task		Finish-only	
Split		External Milestone	◆	Duration-only		Deadline	↓
Milestone	◆	Inactive Task		Manual Summary Rollup		Progress	
Summary		Inactive Milestone	◇	Manual Summary			
Project Summary		Inactive Summary		Start-only	[		

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ID	Task Name	Responsible Party	Task Dependency	Start	Finish	Final Deliverable		Feb 3
							T F	S S
0	**SECO Transition Project**			Fri 2/1/13	Thu 5/16/13			
1	**Project Administration**			Fri 2/1/13	Thu 2/7/13			
2	Review submitted Transition Out plan with COTR	MC&FP	Action required by Govt.	Fri 2/1/13	Fri 2/1/13	Project Plan		◆ 2/1
3	Receive edits or approval on Transition Out plan from COTR	MC&FP,ValueOptions	Input required from Govt.	Fri 2/1/13	Tue 2/5/13			
4	Discuss and receive approval on plan for interface with new vendor Zeiders	MC&FP,ValueOptions	Action requried by Govt.	Fri 2/1/13	Thu 2/7/13			
5	**Internal Planning and Workgroup Meetings**			Fri 2/1/13	Tue 2/5/13			
6	Establish project workgroup teams	ValueOptions		Fri 2/1/13	Fri 2/1/13			0%
7	Provide overview of SECO Transition Out specifics to project team	ValueOptions		Fri 2/1/13	Fri 2/1/13			0%
8	Refine and finalize Transition Out deliverables list	ValueOptions		Fri 2/1/13	Tue 2/5/13			
9	Begin weekly implementation meetings with project team	ValueOptions		Fri 2/1/13	Fri 2/1/13			0%
10	**Interface and Transition Planning with New Vendor**			Fri 2/1/13	Thu 2/7/13			
11	Develop schedule for face to face and telephonic meetings with Zeiders	MC&FP,ValueOptions,Zeiders	Input required from Zeiders and Govt.	Fri 2/1/13	Thu 2/7/13			
12	Hold initial interface meeting with new vendor and review COTR approved interface plan	MC&FP,ValueOptions,Zeiders	Action required by Govt.	Fri 2/1/13	Fri 2/1/13			0%
13	Review, refine and agree on Joint Transition Out Deliverable List	ValueOptions,Zeiders	Input required from Zeiders.	Fri 2/1/13	Tue 2/5/13			
14	Review, refine and agree on Joint Transition Out Timeline for cutting over all aspects of the program	ValueOptions,Zeiders	Input required from Zeiders.	Fri 2/1/13	Tue 2/5/13			
15	Review, refine and agree on Joint Transition Out Project Plan	ValueOptions,Zeiders	Requires completion of task #3 and Input required by Zeiders	Fri 2/1/13	Mon 2/4/13			

Critical	▬▬▬	Manual Task		Baseline Milestone ◇	External Tasks ▬▬▬
Critical Split	┄┄┄┄	Start-only	⊏	Milestone ◆	External Milestone ◈
Critical Progress	▬▬▬	Finish-only	⊐	Summary Progress ▬▬▬	Inactive Task ▭
Task	▬▬▬	Duration-only	▬▬	Summary ▰▰▰	Inactive Milestone ◇
Split	┄┄┄┄	Baseline	▬▬▬	Manual Summary ▰▰▰	Inactive Summary ▱▱
Task Progress	▬▬▬	Baseline Split	┄┄┄┄	Project Summary ▱▱▱	Deadline ⬇

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ID	Task Name	Responsible Party	Task Dependency	Start	Finish	Final Deliverable	T	F	S	S
16	Review, refine and agree on Joint designation of and Responsible Parties for each organization	ValueOptions,Zeiders	Input required from Zeiders	Fri 2/1/13	Tue 2/5/13					
17	Hold additional joint transition meetings, as necessary	ValueOptions,Zeiders		Fri 2/1/13	Fri 2/1/13			0%		
18	**Communications Plan**			Fri 2/1/13	Thu 2/14/13					
19	ValueOptions and Zeiders to meet with COTR to determine overall communications strategy and incorporate key communication timelines into planning	MC&FP,ValueOptions,Zeiders	Input required from Zeiders and the Govt.	Fri 2/1/13	Fri 2/1/13			0%		
20	ValueOptions to provide MC&FP with any content required for communications	ValueOptions	Requires completion of task #19	Fri 2/1/13	Thu 2/14/13					
21	**Continued Operational Support During Transition**			Fri 2/1/13	Thu 4/25/13					
22	Develop plan for ensuring continued operational support across all SECO programmatic during transition to new vendor	ValueOptions		Fri 2/1/13	Thu 4/25/13					
23	Develop plan for phasing out operational support in concert with the transition to Zeiders	ValueOptions,Zeiders	Input required from Zeiders	Fri 2/1/13	Thu 4/25/13					
24	Develop retention and severance plans to ensure maintenance of necessary staffing levels	ValueOptions		Fri 2/1/13	Thu 4/25/13					
25	**Transition of Technology**			Fri 2/1/13	Thu 3/14/13					
26	**SECO Case Management Data Transition**			Fri 2/1/13	Thu 3/14/13					
27	Initial Data Extraction	ValueOptions	Required input from Govt. regarding file format	Fri 2/1/13	Thu 3/14/13					
28	Data Dictionary Creation	ValueOptions		Fri 2/1/13	Thu 3/14/13					

Critical	———	Manual Task	━━━	Baseline Milestone	◇	External Tasks	———	
Critical Split	··············	Start-only	⊏	Milestone	◆	External Milestone	◈	
Critical Progress	▬▬▬	Finish-only	⊐	Summary Progress	———	Inactive Task	▭	
Task	▬▬▬	Duration-only	━━━	Summary	▬▬▬	Inactive Milestone	◇	
Split	···············	Baseline	▬▬▬	Manual Summary	▬▬▬	Inactive Summary	▭	
Task Progress	▬▬▬	Baseline Split	··············	Project Summary	▭▭	Deadline	⬇	

ID	Task Name	Responsible Party	Task Dependency	Start	Finish	Final Deliverable		Feb 3		
							T	F	S	S
29	Transmit data to COTR.	ValueOptions	Action required by Govt.	Fri 2/1/13	Thu 2/21/13					
30	**Schools Teams Database Transition**			Fri 2/1/13	Thu 3/14/13					
31	Initial Data Extraction	ValueOptions	Required input from Govt. regarding file format	Fri 2/1/13	Thu 3/14/13					
32	Data Dictionary Creation	ValueOptions		Fri 2/1/13	Thu 3/14/13					
33	Transmit data to COTR.	ValueOptions	Action required by Govt.	Fri 2/1/13	Thu 2/21/13					
34	**SECO Case Management System and Schools Team Data True-Up**	ValueOptions		Fri 5/10/13	Fri 5/10/13					
35	Transmit data to COTR.		Action required by Govt.	Fri 5/10/13	Fri 5/10/13					
36	**Email Accounts**			Fri 2/1/13	Thu 4/25/13					
37	Review all current emails accounts for SECO and determine disposition for each (transfer or redirect)	ValueOptions	Email addreses cannot be transitioned.	Fri 2/1/13	Thu 3/14/13					
38	Review list of emails and transition plan for each account with Zeiders	ValueOptions,Zeiders	Required inport from Zeiders.	Fri 2/1/13	Thu 2/21/13					
39	Develop plan for "working down" the inventory and ensuring that no open items remain at point of transfer or redirect	ValueOptions		Fri 2/1/13	Thu 4/25/13					
40	Review all internal distribution lists to ensure that email accounts are purged from lists appropriately	ValueOptions	Purge to begin after 5/1/2013.	Fri 2/1/13	Thu 3/14/13					
41	Develop plan for terminating staff access to the accounts at point of transfer or redirect	ValueOptions		Fri 2/1/13	Thu 4/4/13					
42	**New School Orientations**			Fri 2/1/13	Thu 4/25/13					

Critical	▬▬▬	Manual Task	▭▭▭	Baseline Milestone ◇	External Tasks	▭▭▭
Critical Split	··········	Start-only	⊏	Milestone ◆	External Milestone ◈	
Critical Progress	▬▬▬	Finish-only	⊐	Summary Progress ▬▬▬	Inactive Task ▭▭▭	
Task	▭▭▭	Duration-only	▬▬▬	Summary ◣▬▬◢	Inactive Milestone ◇	
Split	············	Baseline	▬▬▬	Manual Summary ▐▬▬▌	Inactive Summary ▭▭▭	
Task Progress	▬▬▬	Baseline Split	············	Project Summary ◣▬▬◢	Deadline ⬇	

ID	Task Name	Responsible Party	Task Dependency	Start	Finish	Final Deliverable				
										Feb 3
							T	F	S	S
43	Provide information to Zeiders on school orientations. Zeiders to determrine plan for conducting, scheduling and managing new school orientations	ValueOptions,Zeiders	Action required by Zeiders	Fri 2/1/13	Thu 4/25/13					
44	**Survey Monkey**			**Fri 2/1/13**	**Thu 4/25/13**					
45	Phase out Survey Monkey account as of 2/1/13	ValueOptions		Fri 2/1/13	Thu 4/4/13					
46	Discuss plan for surveys for Spouses currently in account	ValueOptions		Fri 2/1/13	Thu 4/25/13					
47	**MAP Portal accounts**			**Fri 2/1/13**	**Thu 4/4/13**					
48	Develop plan for shutting down MAP Portal accounts as each staff person leaves	ValueOptions	Input required from Govt. Action required by Govt.	Fri 2/1/13	Thu 4/4/13					
49	Maintain one or two Admin accounts for the creation of accounts, as necessary	ValueOptions		Fri 2/1/13	Thu 2/21/13					
50	**Call Center/Toll Free Numbers**			**Fri 2/1/13**	**Thu 4/4/13**					
51	Develop process for Zeiders to notify MOS when there will be no SECO/SPST or MSEP staff available to receive transfers from MOS	ValueOptions,Zeiders		Fri 2/1/13	Thu 4/4/13					
52	Provide call volume data to Zeiders	ValueOptions,Zeiders		Fri 2/1/13	Thu 4/4/13					
53	**Schools**			**Fri 2/1/13**	**Thu 5/16/13**					
54	Work with Zeiders to complete paperwork to take over school team phone number - 1-888-256-9920	ValueOptions,Zeiders	Input required from Zeiders. Action required by Zeiders.	Fri 2/1/13	Thu 5/16/13					
55	Develop workflow for misdirected phone calls – during business hours	ValueOptions,Zeiders	Input required from Zeiders. Action required by Zeiders.	Fri 2/1/13	Thu 4/4/13					

Critical	———	Manual Task	━━━	Baseline Milestone ◇		External Tasks	———	
Critical Split	··········	Start-only	⊏	Milestone ◆		External Milestone ◈		
Critical Progress	━━━	Finish-only	⊐	Summary Progress ———		Inactive Task	▱	
Task	———	Duration-only	━━━	Summary ◤━━━◢		Inactive Milestone ◇		
Split	··········	Baseline	———	Manual Summary ▐━━━▌		Inactive Summary ▽━━▽		
Task Progress	———	Baseline Split	··········	Project Summary ▽━━▽		Deadline ⬇		

ID	Task Name	Responsible Party	Task Dependency	Start	Finish	Final Deliverable				Feb 3
							T	F	S	S
56	Develop workflow for misdirected phone calls – after hours	ValueOptions,Zeiders	Input required from Zeiders. Action required by Zeiders.	Fri 2/1/13	Thu 4/4/13					
57	**Spouses (SECO)**			**Fri 2/1/13**	**Thu 5/16/13**					
58	Review requirements for no hold transfer and determine plan for accomplishing with external vendor	ValueOptions,Zeiders	Input required from Zeiders.	Fri 2/1/13	Thu 5/16/13					
59	Develop bi-directional transfer process – during business hours	ValueOptions,Zeiders	Input required from Zeiders.	Fri 2/1/13	Thu 4/4/13					
60	Develop bi-directional transfer process – after hours	ValueOptions,Zeiders	Input required from Zeiders.	Fri 2/1/13	Thu 4/4/13					
61	For transfer process from Zeiders to ValueOptions – determine if there is any nuance that needs to be built in to accommodate any special requirements for document translation, babysitting, transportation or non- medical counseling	ValueOptions,Zeiders	Input required from Zeiders.	Fri 2/1/13	Thu 4/4/13					
62	**Spouses (MSEP)**			**Fri 2/1/13**	**Thu 5/16/13**					
63	Confirm if MSEP has requirements for no hold transfer and determine plan for accomplishing with external vendor	ValueOptions,Zeiders	Input required from Govt.	Fri 2/1/13	Thu 5/16/13					
64	Develop bi-directional transfer process – during business hours	ValueOptions,Zeiders	Input required from Zeiders	Fri 2/1/13	Thu 4/4/13					
65	Develop bi-directional transfer process – after hours	ValueOptions,Zeiders	Input required from Zeiders	Fri 2/1/13	Thu 4/4/13					
66	**Billing Calls**			**Fri 2/1/13**	**Thu 2/21/13**					

Critical	▬▬▬	Manual Task	▬▬▬	Baseline Milestone	◇	External Tasks	▬▬▬
Critical Split	•••••••••••	Start-only	⊏	Milestone	◆	External Milestone	◈
Critical Progress	▬▬▬	Finish-only	⊐	Summary Progress	▬▬▬	Inactive Task	▭▭
Task	▬▬▬	Duration-only	▬▬▬	Summary	▬▬▬	Inactive Milestone	◇
Split	•••••••••••	Baseline	▬▬▬	Manual Summary	▬▬▬	Inactive Summary	▭▭
Task Progress	▬▬▬	Baseline Split	••••••••••••	Project Summary	▭▭	Deadline	⬇

ID	Task Name	Responsible Party	Task Dependency	Start	Finish	Final Deliverable	T	F	S	S	Feb 3
67	Provide information on current process for managing/transferring calls. Zeiders will need to work with BAM to develop process going forward	ValueOptions,Zeiders	Action required by Zeiders.	Fri 2/1/13	Thu 2/21/13						
68	**Complaints for SECO, MSEP**			Fri 2/1/13	Thu 4/4/13						
69	Develop transfer process for complaints received regarding SECO or MSEP programs	ValueOptions,Zeiders	Input required from Zeiders and the Govt.	Fri 2/1/13	Thu 4/4/13						
70	**Inquiries**			Fri 2/1/13	Thu 4/25/13						
71	Develop plan for "working down" agent inquiry inventory ensuring that no open items remain at point of transfer or redirect	ValueOptions		Fri 2/1/13	Thu 4/25/13						
72	**Training/Orientation**			Fri 2/1/13	Thu 3/14/13						
73	Discuss provision of overviews/trainings for Zeiders staff	ValueOptions,Zeiders	Input required from Zeiders	Fri 2/1/13	Thu 2/21/13						
74	If requested, schedule sessions prior to transition date	ValueOptions,Zeiders	Requires completion of task #73	Fri 2/1/13	Thu 3/14/13						
75	**Speaking Requests**			Fri 2/1/13	Thu 2/21/13						
76	Meet with JFSAP and Zeiders to discuss process for managing briefings on SECO/MSEP	ValueOptions,Zeiders		Fri 2/1/13	Thu 2/21/13						
77	**Transition of SECO Documentation**		Requires input from the Govt. regarding	Fri 2/1/13	Fri 2/1/13				0%		
78	**Static Documents**			Fri 2/1/13	Thu 4/25/13						
79	Develop list of SECO documents and review with COTR	ValueOptions,Zeiders	Requires inout from Zeiders.	Fri 2/1/13	Thu 3/14/13						
80	Determine list of documents that will be transitioned to Zeiders and those that will be transitioned to MC&FP	ValueOptions,Zeiders,MC&FP	Required input form the Govt.	Fri 2/1/13	Thu 4/25/13						

Critical	━━━━━	Manual Task	━━━━━	Baseline Milestone ◇		External Tasks	━━━━━
Critical Split	··············	Start-only	⊏	Milestone ◆		External Milestone ◈	
Critical Progress	━━━━━	Finish-only	⊐	Summary Progress ━━━━━		Inactive Task	━━━━━
Task	━━━━━	Duration-only	━━━━━	Summary ◤━━━◢		Inactive Milestone ◇	
Split	··············	Baseline	━━━━━	Manual Summary ┣━━━┫		Inactive Summary ▽━━━▽	
Task Progress	━━━━━	Baseline Split	··············	Project Summary ◤━━━◢		Deadline ⬇	

ID	Task Name	Responsible Party	Task Dependency	Start	Finish	Final Deliverable	T	F	S	S
81	**Live Documents**			Fri 2/1/13	Thu 4/25/13					
82	Develop process for transitioning information to Zeiders	MC&FP,ValueOptions,Zeiders	Requires Input from Zeiders	Fri 2/1/13	Thu 4/25/13					
83	**Mailing Address**			Fri 2/1/13	Thu 4/4/13					
84	Review major sources of inbound mail (e.g. schools, returned mail, etc.) and develop plan for sending updated mailing address for new vendor	ValueOptions		Fri 2/1/13	Thu 4/4/13					
85	Determine plan for monitoring currently mailing address and whether to institute a forwarding request via the Post Office or do a sweep and send to new vendor for period of time	ValueOptions	Requires inout from Zeiders and the Govt.	Fri 2/1/13	Thu 4/4/13					

Critical	▬▬▬	Manual Task	▬▬▬	Baseline Milestone	◇	External Tasks	▬▬▬
Critical Split	∙∙∙∙∙∙∙∙	Start-only	⊏	Milestone	◆	External Milestone	◆
Critical Progress	▬▬▬	Finish-only	⊐	Summary Progress	▬▬▬	Inactive Task	▭
Task	▬▬▬	Duration-only	▬▬▬	Summary	▬▬▬	Inactive Milestone	◇
Split	∙∙∙∙∙∙∙∙	Baseline	▬▬▬	Manual Summary	▬▬▬	Inactive Summary	▭
Task Progress	▬▬▬	Baseline Split	∙∙∙∙∙∙∙∙	Project Summary	▭	Deadline	⬇

1. EXECUTIVE SUMMARY

This plan formally documents the process for the transition of the operational responsibilities and contractor duties of the Spouse Education Career Opportunities (SECO) support program from ValueOptions to Zeiders, the new SECO contract vendor. The document also identifies the transition tasks, timeline, transition team organization structure, and the overall approach that ValueOptions will follow to ensure continuity of the SECO support program operations throughout the transition period, within the limits of ValueOptions' span of control and scope of the current contract. We have developed our plan using our:

- operational, functional, and administrative knowledge of the SECO program and the critical items that must be transitioned smoothly
- years of experience with successful transition-in and transition-out projects for government clients
- knowledge of risk management and mitigation best practices
- our understanding of the in-scope transition tasks that will govern this process

While the transition plan does outline transition items which are clearly within ValueOptions' contractual or operational span of control, it does not address areas which, although impactful to the new vendor, are beyond the control span of ValueOptions and not applicable to ValueOptions or our transition plan. These items include, but are not limited to:

- new vendor contract implementation readiness challenges
- new vendor time constraints, priorities or resource availabilities
- new vendor lack of operational or functional knowledge required to deliver the items outlined in their contract
- new vendor system development, deployment or testing timelines
- lack of access to Government-owned and operated computer systems
- new vendor's lack of knowledge regarding Government information assurance requirements, guidelines and standards
- ensuring operational compatibility or data compatibility with third party information systems or the new Government hosted case management system
- ensuring the new vendor has appropriately trained, skilled and capable personnel who understand and can use the information transferred from ValueOptions

2. TRANSITION APPROACH

For this transition, ValueOptions will maintain its existing SECO support staff on-site throughout the transition period. No additional staffing requirements are anticipated to complete the transition to Zeiders.

2.1. Transition Project Duration

While the overall transition is scheduled from 2/1/2013 until 12:01am on 5/1/2013, several of the primary and secondary transition tasks will be completed by ValueOptions prior to the 5/1/2013 date (please see Attachment 1. Revised SECO Transition Out Plan GANTT Chart).

Prior to the commencement of the formal transition, ValueOptions will stand up its transition team in order to facilitate the activities necessary for successful transition of the SECO support program. It is assumed that Zeiders will establish a similar team and assign a transition project manager to work with ValueOptions and the Government to coordinate the contract transition activities throughout the transition period.

2.2. *SECO Transition Pre-Planning*

ValueOptions has already engaged in substantial pre-transition planning and developed a list of tasks, functions, and items which are defined as critical to the success of the SECO support program. All of these items have been group into the six major categories listed below:

1. SECO Transition Management and New Vendor Interface
2. SECO Continuity of Operations During Transition Period
3. Government Furnished Information Transition
4. SECO Operational Procedures and Protocol Transition
5. SECO Toll Free Number (TFN) Transition and Reassignment
6. SECO Tracking System Data Extraction

While these are the primary categories, Project Administration, SECO Transition Risk Management, and SECO Member Communication are also included in ValueOptions' SECO Transition project plan.

3. TRANSITION TEAM ORGANIZATION

ValueOptions has also identified a SECO Transition Team member list, comprised of subject matter experts who possess technical, operational, and functional knowledge of the workings of the SECO Support Program. The following chart illustrates the recommended SECO transition team leads that will be assigned from ValueOptions' SECO Transition Team, as well as the roles and responsibilities of each team member. This chart will be enhanced to include specific names and all necessary contact information for both ValueOptions and Zeiders as part of the initial transition out meeting.

Project Role	Subject Matter Expertise	Roles/Responsibilities
SECO Program Manager	• SECO Operational Workflows	• Oversight of transition out process
SECO Transition Project Manager	• Resource Identification and assignment • Meeting facilitation • Transition Risk Management • Transition plan compliance and fulfillment	• Work with ValueOptions, Zeiders and government Project Managers to coordinate and schedule all transition activities; provide weekly reporting on transition progress; ensure all applicable GFI and SECO related documentation are included as part of transition
IT Transition Lead	• IT • Data Reporting • Telecommunication	• Ensure continuity of all IT activities throughout transition ; ensure all IT related activities are completed during transition period; provide Government with data extraction from ValueOptions operated SECO support systems; ensuring the

Project Role	Subject Matter Expertise	Roles/Responsibilities
		successful transition of the SECO Toll Free number (TFN)
Call Center Lead	• Call Center Workflows • Call Center performance metrics	• Provide SME expertise on current processes supporting SECO program • Assist in coordinating all call center related tasks
Human Resource Lead	• SECO staff transitions	• All HR related tasks

4. WORKFORCE TRANSITION

For this contract transition, all ValueOptions' SECO Team workforce members will remain on-site to perform their transition activities until such time that the transition is completed and approved by the Government. While ValueOptions will ensure that we are appropriately staffed to meet the ongoing contract requirements, we also believe that transitioning existing SECO Program support personnel to the new vendor will greatly improve the chance of a smooth transition. Our experience will contribute to ensuring transparency and continuity of service delivery to SECO service recipients while significantly reducing the ramp-up, staff training, and acclamation requirements for the new vendor.

If this is appealing to the Government and Zeiders, ValueOptions' Human Resource Director will coordinate with the Zeiders Human Resource Director or Project Manager to arrange office locations, dates, and times for onsite interview of ValueOptions' SECO workforce members who Zeiders would like to consider for position vacancies on their new contract. That being said, ValueOptions holds no responsibility for ensuring that employees accept employment offers presented to them by Zeiders' representatives.

5. WORK EXECUTION DURING TRANSITION

Throughout the transition of this contract, work will continue to be performed by ValueOptions in accordance with the approved program. ValueOptions will maintain all responsibility for tasks and deliverables assigned to ValueOptions. At the end of the 90-day transition period, and upon transition approval, Zeiders will assume full responsibility for all ongoing tasks and deliverables related to the day-to-day management of the program.

6. SUBCONTRACTS

Zeiders may choose to negotiate with third party vendors, service providers, or content providers currently providing ValueOptions with resources, systems, or information in support of the SECO program activities or functions. That activity is considered outside the scope of this transition plan and not the responsibility of ValueOptions.

7. PROPERTY TRANSITION

7.1. SECO Toll Free Number (TFN)

ValueOptions will identify the TFNs which are applicable to the SECO support program and transferable to the new vendor for operational continuity. Upon receipt of the completed Responsible Organization (RespOrg) Form from Zeiders, ValueOptions will list the TFNs on

the form and provide our telecommunications account reference and vendor information so the number can be released from ValueOptions and made available for use by Zeiders at 12:01am on 5/1/2013. The forms will be released to Zeiders within three business days of the receipt of the forms by ValueOptions.

Although the forms will be completed and returned to Zeiders within three business days, ValueOptions is contractually required and obligated to respond to all inbound calls on the TFN until the conclusion of the transition period. As a result, the TFN cannot be transitioned for use by Zeiders prior to 5/1/2013, unless the Government is willing to provide ValueOptions with contractual release of responsibility for all inbound call activity to the SECO TFN.

7.2. *Government Furnished Information (GFI)*

All SECO-related GFI provided to the ValueOptions Team during the performance of the SECO task under the Military OneSource contract will be cataloged and transitioned to the Government. This includes the following:

- School Orientation Presentations
- School Orientation Scripts
- MyCAA Training Material
- MAP Portal Information

7.3. *Government Furnished Equipment (GFE)*

GFE includes laptop, desktop or tablet devices, flash and external hard drives, and employee ID badges. Neither during the implementation of the Military OneSource contract nor during the ongoing performance of the SECO program support task has the ValueOptions Team received any GFE. As such, the transition of GFE is outside the scope of this transition.

7.4. *Incumbent Owned Equipment*

All ValueOptions' Team owned equipment will remain with the incumbent upon completion and approval of the transition. This equipment includes incumbent-issued laptops, desktop computers, telephony equipment and application software systems, database technology, tracking systems, organizational tools, organizational process maps, and company issued ID cards and External Certificate Authority (ECA).

If it is determined that any of the ValueOptions' Team-owned equipment is required to stay with the contract to ensure successful completion of the contract, ValueOptions will identify options where this equipment may be available for purchase through the established procurement management processes, by Zeiders or the Government, for their use.

7.5. *Intellectual Property*

Per the Military OneSource contract, all intellectual property which is a direct result of work on the contract deliverables will be transitioned to the new contractor in order to ensure the successful completion of the project. The transition out contract pricing takes intellectual property into consideration and as such, any resulting intellectual property will be owned by the Government.

Intellectual property may include various documentation, supplier and subcontractor information, service agreements, or original designs or plans, which were developed using contract funding. ValueOptions will identify all SECO related material that meets the scope of this definition.

In any situation where the transition of intellectual property is required, ValueOptions will only deliver/transition intellectual properties directly to the Government and request a formal review and discussion to determine if any competitive harm will result from the transitioned material being released into the public domain or placed in the possession of a direct competitor.

7.6. *User Accounts and Passwords*

As part of the SECO support program transition from ValueOptions to Zeiders, various user account accesses to Government-owned and operated systems such as the MyCAA and MAP portals and access authorizations held by ValueOptions personnel must be disabled at the end of the transition period. Due to Government information assurance requirements, ValueOptions is not permitted to transfer or share user account accesses with Zeiders personnel. All such requests for access must be submitted to the Government.

Once the transition is complete and approved by the Government, ValueOptions' will provide the Government with a complete list of all ValueOptions' Team SECO program support employees whose user accounts can be disabled.

7.7. *SECO Tracking System Data*

In order to ensure that up-to-date and complete information for the SECO tracking data is maintained in the Customer Relation Management System (CRM) used by our SECO subcontractor and the tracking systems used by the SECO Schools Team, ValueOptions will perform two data extractions of the SECO member and school information contained in the CRM and school teams systems. The initial data extraction will contain data from 11/1/2011 through 2/20/2013 and will be provided to the Government in a Microsoft Excel xls or xlsx formatted file with an accompanying data dictionary in a Microsoft Word document.
The final "true-up" data extraction will occur 10 days after the final transition date of 5/1/2013 and, will contain all data entered into the CRM and school teams systems during the period of 2/21/2013 through 5/1/2013, using the same file format as the initial extract.

While ValueOptions will indeed provide the data, ValueOptions holds no responsibility for ensuring that Zeiders understands the data that has been provided or is able to map it to their systems, nor does ValueOptions hold any responsibility for the post-transition use of the data or the successful integration or compatibility of the data with third party systems.

7.8. *SECO Email Addresses*

Since the actual email addresses are registered to the Militaryonsource.com domain, they cannot be transitioned from ValueOptions to Zeiders for continued use. ValueOptions will coordinate with the Government and Zeiders on the email routing rules and disposition of any inbound messages we receive. The email rerouting protocol will remain in place until the last day of the

transition, enabling Zeiders to communicate new email addresses and process changes to the SECO service recipients and school representatives.

8. KNOWLEDGE TRANSFER

For this transition, knowledge transfer will occur over the entirety of the 90 day transition period. The knowledge transfer will take place via various methods, meetings, discussions and specialty workgroups. Members of the ValueOptions Team, with subject matter expertise and knowledge of SECO operations, will participate in the regularly scheduled SECO transition discussions and will freely answer non-proprietary or company confidential questions presented to them by Zeiders and Government representatives.

While we are thoroughly committed to supporting the transition and ensuring an error-free transition of responsibilities and information, knowledge transfer will not include any of the following activities:

- formal (classroom) training or informal CBT or Webinar training of Zeiders personnel beyond a broad based overview of the services provided by Military OneSource such that Zeiders will be able to recognize when to transfer a call back to ValueOptions
- shadowing of ValueOptions' SECO-support personnel by Zeiders staff members
- development, delivery or presentation of technical illustration, schematics, or workflow diagrams beyond those items which are currently provided to the Government as a contract deliverable and available to Zeiders from the Government

9. TRANSITION SCHEDULE AND WORK PLAN

We provide a GANTT chart as a separate document (Attachment 1. Revised SECO Transition Out Plan GANTT chart) that illustrates ValueOptions' schedule of events, dependencies, resource assignments, and responsibilities for the transition of the SECO support program from ValueOptions to Zeiders. Once reviewed and approved by the Government, any subsequent changes to this schedule will require additional review and approval from the Government.

10. HANDOVER AND ACCEPTANCE

The Government will make the determination of when transition is completed and will provide formal acceptance indicating such. To facilitate this process, the ValueOptions' SECO Transition Project Manager will provide the Government with a transition checklist that reconciles to the items in ValueOptions transition plan. In addition, the Project Manager will also provide the Government with weekly transition progress reports so the Government can determine when all activities associated with the transition have been completed.

Any items requested by Zeiders, which are not part of the ValueOptions' transition plan, must be approved by the Government before ValueOptions can take any action on the request. ValueOptions will also meet with the Government's transition project manager to ensure that all concerns and issues expressed by ValueOptions are correctly escalated, addressed or resolved. Once the Government's transition project manager has formally accepted the transition, the transition checklist and supporting documentation will be signed and accepted by the Government transition project manager and returned to ValueOptions. It is only after the receipt of the signed transition checklist from the Government that the transition will be considered complete.

INTRODUCTION & EXECUTIVE SUMMARY

FPR Revision Note: All updates to cost realism narrative have been included in "track changes" within this document. All exhibits within this narrative have been updates without "track changes".

PURPOSE OF COST REALISM NARRATIVE

The purpose of this cost realism narrative is to provide the Military Community and Family Policy (MC&FP) and the Department of the Interior with justification for the overall price reflected in the ValueOptions Military OneSource (MOS) proposal. This document primarily focuses on the estimating methodology and assumptions used in determining ValueOptions' direct labor, indirect cost, and other direct costs proposed for the contract. The exhibits and narratives included in this document will describe and illustrate ValueOptions' full understanding of the program, and ultimately, our ability to perform the contract at a fair and reasonable price. ValueOptions based our proposed pricing on our historical experience, commercial best practices and our recent experience in delivering MOS services. Please reference Volume II – C.2: Pricing Assumptions and Pricing Volume Overview for details related to ValueOptions' pricing model.

VALUEOPTIONS MILITARY ONESOURCE TOTAL PRICING

ValueOptions applied a cost estimating approach to the majority of activities outlined in the 2nd Bridge Contract Request for Proposal (RFP) (Solicitation # D13PS00423) Performance Work Statement (PWS). The table below displays the output of this approach, which includes the Total Contract Price by Contract Line Item Number (CLIN) for the duration of the Base Period and Option Periods. Per program guidance, transition out pricing will be definitized later.

Military OneSource Contract Price					
CLIN	**Base Period**	**Option Period 1**	**Option Period 2**	**Total**	
X001: 1-800 Call Center Operations	$ 9,773,913	$ 5,864,348	$ 5,864,348	$	21,502,608
X002: IT Operations Management	1,798,790	1,079,274	1,079,274	3,957,339	
X003: Non-Medical Counseling	8,724,392	5,234,635	5,234,635	19,193,663	
X004A: Joint Family Support Assistance Program	2,899,719	1,739,831	1,739,831	6,379,382	
X004B: Spouse Education and Career Opportunities	2,866,872	-	-	2,866,872	
X005: Program Management	1,838,123	1,102,874	1,102,874	4,043,871	
X006: Strategic Outreach -- Labor	106,431	63,859	63,859	234,148	
X007: Facilities Lease and Operational Costs	4,080,159	2,412,505	2,412,505	8,905,170	
X008: Other Direct Costs	1,769,849	900,118	900,118	3,570,085	
X009: Travel	236,984	142,191	142,191	521,365	
X010: Transition Out (Optional)	-	-	-	-	
Total Contract Price	**$34,095,233**	**$18,539,635**	**$18,539,635**	**$ 71,174,503**	

This cost realism narrative will discuss the total cost buildup specific to the *Base Period of the MOS bridge contract*, which is also consistent with the pricing approach used to estimate costs for the Option Periods.

VALUEOPTIONS MILITARY ONESOURCE PRICING APPROACH

The layout of this cost realism narrative reflects the same layout as attachment J-1 CLIN Structure provided in the MOS RFP. ValueOptions will describe our pricing approach for each respective CLIN in the following structure:

- **Introduction & Overview of Major Activities –** This section provides an overview of the key functions within the CLIN as described in the PWS and a summary of the total CLIN cost.

- **Best Practices, Continuous Systemic and Operational Improvement –** This section discusses ValueOptions' steadfast commitment to respond to the specific needs of the military community and demonstrate our commitment to continuous and systemic operational improvement. Within each CLIN we discuss our current solutions which drive efficiency and value for Military OneSource Participants.

- **Overview & Estimating Approach of Direct Labor –** This section provides an overview of major labor categories within the CLIN and the estimating approach utilized to determine the appropriate level of staffing to support the contract requirements and RFP workloads.

Based on the unique types of costs we will use a different approach to discuss the costs in CLIN X007 Facilities Lease and Operational Costs, CLIN X008 Other Direct Costs and CLIN X009 Travel. Per the program, CLIN 0010 Transition Out shall be definitized "post award" and as such, we have not provided pricing information at this time.

ESTIMATING APPROACH FOR DIRECT LABOR

Direct labor cost represents a significant component of the service-oriented MOS program. As the current incumbent MOS contractor, ValueOptions used historical operational data, productivity rates and resource allocation statistics, to ensure we are accurately estimating the level of effort necessary to provide high-quality services to MOS Participants. Whenever possible, we anchored the estimating foundation for each labor category in our familiarity with the workload, historical processes, staffing ratios, and performance metrics associated with each activity and labor resource. Collectively, our team utilized the following methodologies for all proposed direct labor estimates for the MOS contract.

- **Contract Required Key Personnel –** Per the solicitation requirements, we staffed the necessary Key Personnel (both dedicated and shared) to the MOS contract to assure the consistent delivery of high quality services to Participants.

- **Historical Staffing Levels** – We reviewed historical staffing levels and supporting historical and operational data to understand the current baseline staffing levels. In some instances, we estimated

SOURCE SELECTION INFORMATION–See FAR 2.101 and 3.104
Use or Disclosure of the Data contained on this sheet is subject to the restriction on the title page of this proposal

level of effort based on our historical knowledge of the MOS contract requirements (e.g., Information Technology positions).

- **Span of Control Estimates** – We determined staffing ratios that reflect the historical span of control of supervisors or management personnel over staff employees. In certain cases, these ratios reflect an increased span of control, which are now achievable based on our experience with the MOS program. When appropriate, we staffed whole direct Full

Example Span of Control FTE Calculation		
Staff FTEs	Staff to Supervisor Ratio	FTEs
I	*II*	*III = I /II*
30.00	10 to 1	3.00
Total		3.00

Time Equivalents (FTEs) for these labor categories, as we believe the MOS program requires dedicated resources, operations staff, and management. By dedicating whole FTEs, we ensure staff can dynamically respond to the specific needs of the military Participants. For Call Center Operations, ValueOptions adjusted variable labor staff to ensure our level of supervision and management provide sufficient coverage to service the 24 hours, 7 days a week, 365 days a year requirement of the contract.

- **Workload Calculation** – For staff completing workload-based activities, ValueOptions estimated number of direct hours to complete tasks based on historical workloads multiplied by expected level of effort. Our productivity rates reflect our continuous commitment to train and develop our staff. MOS new hire training has evolved to a mandatory 4-week comprehensive curriculum coupled with monthly non-medical and systems trainings. Triage Consultants spend an average of 250 hours in the first year in scheduled trainings, and at least 3 hours per week of scheduled training and meetings with Clinical Quality Auditors and Supervisors.

Our workload-based estimating approach typically requires two critical steps. ValueOptions first estimates the expected workload (e.g. # of sessions, referrals, etc.) associated with the key administrative tasks that drive staff level of effort. Secondly, we identify the productivity rate (call handle time, referral process time, etc.) of the labor position(s) required to complete each task. Once the workload and productivity are identified, the key factors are in place to calculate direct labor hours. We divide total number of direct hours by ValueOptions' annual productive labor hours (1,800) for our direct labor staff to arrive at number of FTEs. As previously mentioned, we estimated whole FTEs for these labor categories, as we believe the MOS program requires dedicated operations staff and management to ensure we can adequately address the unique requirements of the contract. A sample of this estimating approach is illustrated below:

Example FTE Calculation

Task	RFP Workload	Allocation of Effort by Task	Workload Per Task	Workload Rate Per Hour	Direct Hours	FTEs
Calc	I	II	III = I x II	IV	V = III/IV	VI = V/1800
Task 1	50,000	**50%**	25,000	**6.00**	4,167	2.31
Task 2	50,000	**30%**	15,000	**15.00**	1,000	0.56
Task 3	50,000	**20%**	10,000	**2.00**	5,000	2.78
Total						**6.00**

The estimated allocation of effort by task is generally based upon operational data from the RFP and/or management assessment of the roles and responsibilities for the particular labor position.

The productivity rates for tasks are based upon operational data from our current operations. Where applicable, rates were adjusted to reflect the expected benefits of process improvements and/or technology enhancements.

- **Call Center Workforce Tool Analysis** – For Call Center Operations staff, we relied on our Workforce Management tool and our historical experience (call volumes, call patterns, average handle time, etc.) to estimate the level of effort needed to meet the requirements of the PWS such as maintaining a dedicated call center and answering 90% of calls within 20 seconds. A full description of the assumptions utilized by the Workforce Management tool is included within the cost realism discussion for CLIN X001: Call Center Operations.

KEY ASSUMPTIONS FOR DIRECT LABOR
In addition to a set of prescribed labor estimating methodologies, ValueOptions utilized various key assumptions for our direct labor cost buildup. These assumptions include:

- **Productive Hours Assumption** – We assume an annual productive labor hour of 1,920 for all ValueOptions' management and 1,800 for all management, staff and Workplace Options subcontractor staff. For all employees, ValueOptions and our subcontracting teammates include training specific to the MOS contract in our productive hour base. We recognize the need for all our employees to understand the ever-changing needs of the military population and ensure that

Productive Hours		
	All Staff	
Hours Category	(VO & Subcontractors)	VO Management
Total Hours / Year	2,080	2,200
PAL Hours / Year	(152)	(152)
Sick Hours / Year	(48)	(48)
Holiday[1]	(56)	(56)
Personal Day	(8)	(8)
Other Leave Time	(16)	(16)
Productive Hours / Year	1,800	1,920

(1) Note, since the contract requires 24/7/365 service ValueOptions assumes that program approval will be granted to allow staff to work on holidays

we provide high quality services that are within the scope of the program.

- **Annual Merit Increase** – Beginning in 2013, we move to a single annual merit increase date for all team members. We reflect an annual merit increase of 2% in our direct labor rates proposed to the government for the duration of the contract. Our subcontracting partners' proposed merit increases are reflective of their own business operations.

- **Location Based Staffing** – We based our pricing on our current facility footprint in Chesapeake, VA and Arlington, VA along with JFSAP and other various staff who work throughout the CONUS. The location split assumes:

Military OneSource Staffing Assumptions			
Description	**Base Period**	**Option Period 1**	**Option Period 2**
Chesapeake, VA Location	46%	43%	43%
Arlington, VA Location	34%	33%	33%
Other (Reston, Work from home, JFSAP States)	20%	24%	24%
Total Staff	100.00%	100.00%	100.00%

DISCUSSION OF INDIRECT EXPENSE ASSUMPTIONS

ValueOptions' approach to burdening appropriate indirect costs onto direct costs differs based on the specific cost components within each MOS CLIN. In order to project future indirect cost estimates for the MOS contract, ValueOptions adjusted our current Federal Division's 2012 Actual & Budget Indirect Rates to reflect known adjustments such as MOS direct labor, and estimated costs for Non-Medical sessions. In addition, ValueOptions' management made a reduction to the Overhead Rate for the duration of the contract to offer a more competitive price to the government.

Our projected indirect rates and explanation of each adjustment are displayed below:

		MOS Contract		
Indirect Rate	**2012 Actual & Budget**	**Base Period**	**Option Period 1**	**Option Period 2**
Fringe Rate	35.26%	0.00%	0.00%	0.00%
Overhead Rate	52.17%	43.75%	43.75%	43.75%
General & Administrative Rate	15.06%	16.22%	16.22%	16.22%

- **Fringe** – Our projected fringe rate is based on cost for non-productive time (e.g., PAL, Sick) and benefits (e.g., Health Insurance, Dental Insurance, payroll taxes). We apply a Fringe burden to all

~~ValueOptions direct labor hours proposed for the MOS contract.~~ValueOptions' fringe costs (i.e., expenses such as health insurance, payroll taxes and other benefits) are included within the Overhead pool for the Military OneSource contract. All fringe costs associated with non-productive time for employees is imbedded within the base hourly rates offered to the government (i.e., salary is divided by only productive time).

- **Overhead** – Our overhead pool includes a portion of the overhead costs allocated from corporate, equipment, service center overhead, IT depreciation, telecommunications expense, supplies, and other labor related costs that support the overall MOS program. We apply an overhead burden to all ValueOptions direct labor hours proposed for the MOS contract. Subcontractor costs are not burdened with ValueOptions' overhead costs. In addition, ValueOptions' management made a reduction to the Overhead Rate for the duration of the contract to offer a more competitive price to the government.

- **General & Administrative (G&A) Expense** – Our G&A pool includes the cost related to the overall management and administration of our business. ValueOptions calculates indirect rates in aggregate based on a Total Cost Input methodology for our Federal Division based on current practices. In addition to ValueOptions' corporate allocation, this pool includes the Federal Leadership Team and back office support such as finance and accounting services, contract administration, reporting and overall Medical Director oversight of Federal contracts. We apply a G&A burden to all costs on the MOS contract.

- **Profit** – We applied a profit rate of 7% for all CLINs unless stated otherwise in Section L of the solicitation (profit was not included for costs in CLIN X007 Facilities Operational and Lease Expense, CLIN X008 Other Direct Costs and CLIN X009 Travel). This is consistent with the profit rate applied on our current contract.

EXECUTIVE SUMMARY CONCLUSION
Our estimating approach for MOS is rooted in our historical experience and supported workloads, historical productivity levels, and other operational metrics that reflect our experience as the incumbent contractor. We are committed to providing estimates that are consistent with our lessons learned as the current MOS contractor aligned with best practices derived from our other lines of business. In addition, ValueOptions' leadership team included a management reduction to the Overhead Rate to offer a more competitive price to the government. In developing and justifying the cost proposal estimate, we considered the collective impact of each of these key factors. The result is a fair and reasonable cost proposal estimate that reflects our historical experience and ongoing performance within each of our functional areas.

CLIN X001: 1-800 CALL CENTER OPERATIONS

INTRODUCTION & OVERVIEW OF MAJOR ACTIVITIES
MOS Call Center Operations is the single point of access to provide warm hand-off referrals to appropriate non-medical services and resources for Participants and providers. We treat the

Government's requirement for a Master's level of educational background as a threshold standard. ValueOptions is very selective in our hiring process, and in addition to the educational threshold, we require our Triage Consultants to undergo rigorous training and to demonstrate a passion for serving the MOS Participant population.

Our call center, MOS EAP Website, and technology infrastructure have demonstrated their ability to operate a 24/7 toll-free MOS EAP Call center for the MOS program. The following major activities are included in this function:

- **24/7 Triage of Incoming Call Volume** – We offer around the clock CONUS and OCONUS call answer; we identify the caller's inquiry or issue at which point a warm hand-off, referral, and/or necessary information is provided to the MOS participant
- **Specialty Consultation** – We assist eligible Participants to navigate more specific issues such as Wounded Warrior, Special Needs, Adoption, Elder Care, Adult Disability, Education, Work Life, Document Translation, etc.
- **Case Note Data Collection & Storage** – Our call center staff ensures all Participant data is collected in our Case Management System (CMS)

BEST PRACTICES, CONTINUOUS SYSTEMIC AND OPERATIONAL IMPROVEMENT

Our team remains steadfast in our commitment to respond to the specific needs of the military community and demonstrate our commitment to continuous and systemic operational improvement. Based on this mantra, we have made the following operational changes to improve our value proposition offered to the government.

- **Implementation of Workforce Management Tool** – We recently implemented a state-of-the-art workforce management tool to optimize staffing within our 24/7 MOS Call Center operations. Built on known historical call intervals, workload assumptions and contract performance requirements, we anticipate an efficient Triage Consulting staffing model to adhere to the requirements of the contract while continuing to provide best-in-class, high-quality services to the MOS Participants.
- **Refinement of Policies & Procedures –** We began operating the MOS contract in August 2011 under a bridge contract at the request of the Government. Based on lessons learned in the past 17 months, our management has refined policies and procedures for the Call Center Operations allowing our staff to serve the MOS Participants more effectively and efficiently. We have reflected these operational improvements in our assumptions for staffing estimates.

OVERVIEW & ESTIMATING APPROACH OF DIRECT LABOR

Below is a listing of major labor categories within the Call Center Operations along with an overview of the process utilized to determine the required labor to meet the MOS program requirements. A summary of the total FTEs and total cost can be found in the table below and a description of labor categories representing over 80% of the total CLIN cost are included in this section of the CLIN narrative.

CLIN 0001: 1-800 Call Center Operations				
Direct Labor Category	**FTE Count[1]**	**% of Total Direct CLIN FTEs**	**Total Price**	**% of Total CLIN Price**
Triage Consultant	88.9	38%	3,695,049	38%
WPO Worklife Consultants	65.5	28%	2,408,108	25%
Triage Consultant (licensed)	27.6	12%	1,319,094	13%
Clinical Supervisor	14.9	6%	823,262	8%
Researcher - CSA	15.0	6%	499,613	5%
Wounded Warrior Resource Specialty Consultant	6.0	3%	305,370	3%
WPO Team Lead	6.1	3%	279,807	3%
Call Center Manager	3.5	2%	226,268	2%
Research Supervisor	2.0	1%	77,055	1%
Manager of Wounded Warrior Resources	1.0	0%	57,832	1%
Resource Coordinator	1.0	0%	41,798	0%
Workforce Management Analyst	1.0	0%	40,658	0%
Total	**232.4**	**100%**	**$ 9,773,913**	**100%**

- **Triage Consultants (Non-Licensed, Licensed)** –Master's level staff primary responsibilities include intake of all Military OneSource calls, warm-transfer of all calls to appropriate triage location (e.g., Wounded Warrior, MFLC, Non-Medical Counseling), detailed documentation of all case notes in our Case Management System (CMS), and duty to warn responsibility for high-risk events. We relied upon our Workforce Management tool, coupled with our historical metrics, for estimating the number of FTEs necessary to meet the demands of the RFP requirements.

Key Assumptions Utilized by our Workforce Management Tool to estimate the level of effort is based on ValueOptions' historical experience coupled with RFP Requirements:

- **Interval Call Volume** based on MOS historical data from *November 2011 – November 2012*
- **Average Handle Time** based on historical workloads: *7.2 minutes / call*
- **Performance Requirements** based on RFP QASP and industry best practices: *90% of calls answered live within 20 seconds of*
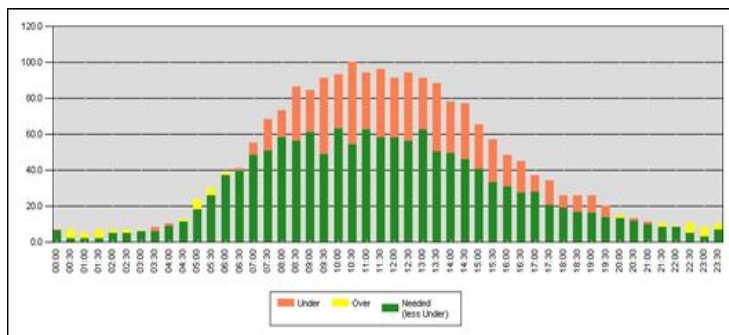
Based on our experience, we understand complicated and/or high-risk calls require service from our licensed Triage consultants; therefore, 25% of our Triage Consultants have a license to ensure high-risk cases are delivered with the highest quality of service. The remaining 75% of our well-qualified,

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well-trained Master's level staff support the MOS Call Center Operations but do not require clinical licensure.

- **WPO Worklife Consultants** – ValueOptions' trusted subcontractor, WorkPlace Options (WPO) provides Worklife Consultants to deliver two levels of worklife triage support: basic and full cases. A basic case requires little consultation with the worklife consultant for members to receive access to readily available resources. A full case receives a detailed consultation with a work-life consultant for members to receive a qualified referral to resources that are available and meet the member's specific criteria. Our price assumes a split of 20% basic cases and 80% full cases – both based on our historic experience of the program. An illustration of this approach for Tier 6 is in the exhibit below; we based the staffing utilized for actual pricing on the Likelihood of Performance per schedule L.

	Monthly Projected Calls	Incoming Call %	Work Life Call %	WPO Incoming Call %	Annual Work Life Workload	Allocation of Effort by Task	Workload Per Task	Workload Rate Per Hour	Direct Hours	FTEs
Task										
Calculation	*I*	*II*	*III*	*IV = II x III*	*V = I x IV x 12*	*VI*	*VII = V x VI*	*VI*	*VII = V/VI*	*VIII = VII/1800*
Basic - Child Assistance	66,000	72 28%	12 72%	9 20%	72,844	**2%**	1,457	**3.53**	413	0 36
Basic - Elder Care	66,000	72 28%	12 72%	9 20%	72,844	**2%**	1,457	**2.07**	704	0 53
Basic - Daily Living	66,000	72 28%	12 72%	9 20%	72,844	**16%**	11,655	**2.07**	5,633	4 21
Full - Child Assistance	66,000	72 28%	12 72%	9 20%	72,844	**8%**	5,827	**0.78**	7,479	4 96
Full - Elder Care	66,000	72 28%	12 72%	9 20%	72,844	**8%**	5,827	**0.48**	12,043	7 77
Full - Daily Living	66,000	72 28%	12 72%	9 20%	72,844	**64%**	46,620	**0.71**	65,268	42 73
Total (Rounded to Whole FTE)										**61.00**

Table title: CLIN 0001: WPO Work Life Consultant FTE Calculation - Tier 6 (60,001 - 70,000)

- **Clinical Supervisor** – The primary responsibilities of these experienced clinicians include overseeing the triage consultants (licensed and non-licensed), supporting all call center and non-medical activity and providing ongoing training for the Call Center staff. The Clinical Supervisor labor category is based on our historical span of control (10:1) as well as responding to the coverage requirement to fulfill the 24/7/365 requirement of the Call Center Operations. The supervisor labor category is variable based upon the expected call volume in CLIN X001: Call Center Operations. An illustration of this span of control approach for Tier 6 is in the exhibit below; we base the staffing utilized for actual pricing on the Likelihood of Performance per schedule L.

Triage Consultant FTEs	Triage Consultant to Clinical Supervisor Ratio	Clinical Supervisor FTEs
I	*II*	*III = I /II*
109	10 to 1	11.00
Additional Supervisors Needed to cover 24/7 Call Center (Based on Historical Staffing)		2.00
Total FTEs		13.00

Table title: **Clinical Supervisor Span of Control**

CLIN X002: IT OPERATIONS MANAGEMENT

INTRODUCTION & OVERVIEW OF MAJOR ACTIVITIES

ValueOptions administers IT Operations Management for MOS program in a program required DIACAP environment. These operations include an EAP Web Presence that supports EAP online services offered only to eligible Participants. ValueOptions provides our award-winning EAP service website, where Participants can privately explore areas of concern that may compromise their quality of life and mission readiness. Working with the Government, ValueOptions continues to host the EAP web presence in parallel with the public website (militaryonesource.mil) to assure a cohesive experience for all Participants. In addition, ValueOptions will maintain our existing Case Management System (CMS) with all case notes from the Military OneSource operation. The major activities included in this function include:

- **Secure Login for All Eligible MOS Participants** – We maintain a single entry point from the refreshed public website to our MOS EAP website to ensure a seamless experience for MOS Participants and providers, both CONUS and OCONUS to promote Participant mission readiness and good health. This integration mitigates the risk of Participants not using and valuing the site.
- **Customized, Award-Winning Content** – In addition to the specific requirements of the militaryonesource.mil website, we customize our Award-Winning health and wellness platform to provide comprehensive information and practical recommendations for health, relationships, work/life balance, life events, and daily living skills under the existing bridge contract. MOS Participants will have access to credible and trustworthy information about health testing/procedures, lifestyle, life stages, and diseases and conditions. The materials, which are updated monthly, include calculators, podcasts, self-assessments, slide shows, articles, and videos and animation.
- **Network Redirection Services** – Our team continues to meet the requirement to redirect militaryonesource.com web traffic to the militaryonesource.mil EAP website to ensure all prospective and active Participants are properly routed to the MOS public website.
- **Case Management** – Our team continues to maintain case management records in our Case Management System (CMS) related to all MOS activity.

BEST PRACTICES, CONTINUOUS SYSTEMIC AND OPERATIONAL IMPROVEMENT

Our team remains steadfast in our commitment to respond to the specific needs of the military community and demonstrate our commitment to continuous and systemic operational improvement. Under our current operations, we will continue to include:

- **Spanish EAP Website** – Exceeding the Government's requirements, the entire MOS EAP website is also available in Spanish, which further aids Participant engagement/reach and the usefulness of the information website. Last year, we had nearly 3,500 unique users on the website.
- **Section 508 Compliance** – Our MOS Webmaster and EAP Content Management team use the automated Ramp Ascend to ensure that website color schemes, menu navigation system, video, audio content files, and HTML coding fully comply with – **and exceed** – Section 508 of the Workforce Investment Act. We leverage the Worldwide Web Consortium's (W3C) industry best practice standards for website accessibility to ensure easy accessed by persons with disabilities.

OVERVIEW & ESTIMATING APPROACH OF DIRECT LABOR

Below is a listing of major labor categories within the IT Operations Management CLIN along with an overview of the process utilized to determine the required labor for the MOS program requirements. A summary of the total FTEs and total cost can be found in the table below and is further discussed in this section of the CLIN narrative.

Direct Labor Category	FTE Count	% of Total Direct CLIN FTEs	Total Price	% of Total CLIN Price
CLIN 0002: IT Operations Management				
Web Developer III	2.70	9%	$ 215,804	12%
DB2 - DBA-II	2.00	7%	155,490	9%
LAN Support Tech	3.70	12%	151,043	8%
AIX System Administrator II	2.00	7%	141,840	8%
AS400 System Administrator II	2.00	7%	139,965	8%
Business Systems Analyst II	2.56	9%	138,912	8%
Business Systems Analyst III	1.70	6%	110,045	6%
IT Quality Assurance Specialist II	1.70	6%	100,381	6%
Director of IT / Communication Resources	1.00	3%	91,168	5%
Web Development Manager	1.00	3%	92,080	5%
Computer Operator III	2.00	7%	83,160	5%
Information Security Manager	0.85	3%	69,911	4%
Web Developer II	0.90	3%	61,439	3%
LAN/WAN Engineer	1.00	3%	63,285	4%
Information Security Analyst II	1.00	3%	57,743	3%
Telecommunications Specialist	1.00	3%	45,593	3%
Production Scheduler	1.00	3%	34,718	2%
Computer Operator II	2.00	7%	46,215	3%
Total	**30.11**	**100%**	**$ 1,798,790**	**100%**

We have based all of our IT Operations Management staffing based on our historical staffing levels and our intimate knowledge of the program requirements and specifications. Although the FTEs to support the IT operations for the MOS contract remain in line with the current program, the total cost of this CLIN has increased, driven by increased fully burdened rates of the supporting staff. This increase in cost is a reflection of higher than anticipated salaries for employees necessary to support the MOS IT Operations as well as a difference in the overhead rate application to this CLIN. Below is a description of labor categories representing over 80% of the total CLIN cost.

- **Web Developer III** – The primary responsibility of this position is to provide web development support services for the EAP Web Presence requirement including the overall blended public and EAP specific website. In particular, they implement the website structure, color pallet, accessibility features, perform maintenance of the overall website and collaborate with the Web Development Manager and Web Developer II.
- **DB2-DBA-II** – The primary responsibility of this position include the capture of all Military OneSource data transactions that take place including all web related activity.
- **LAN Support Tech –** The primary responsibility of this position is to act as dedicated local support for the call centers and local area computer networks. Based on historical staffing, ValueOptions is dedicating two LAN Support Techs at each Call Center location to ensure all staff can efficiently perform the requirements of the contract and receive IT support when necessary.
- **AIX System Administrator II** – The primary responsibility for this position is support of the program EAP Web Presence requirements through management of the UNIX based systems and platform.
- **AS400 System Administrator II –** The primary responsibility for this position is support of the program EAP Web Presence requirements through management of the IBM systems and software.
- **Business Systems Analyst II** – This position provides all business system support activities including support business process development, workflow development, development of specifications based on workflows for operations and collaboration with the Business Systems Analyst III on an ongoing basis.
- **Business Systems Analyst III** – This position provides all business system support activities including support business process development, workflow development, development of specifications based on workflows for operations and collaboration with the Business Systems Analyst II on an ongoing basis.
- **IT Quality Assurance Specialist II –** This position provides data analysis, quality assurance and reviews of MOS data. This staff member will do periodic data pulls and make sure information is accurate and complete prior to our team running reports for reporting under the MOS contract. If an anomaly is found, this team member works with our Data and Reporting staff to identify and remedy the error / anomaly.
- **Director of IT / Communication Resources –** This position is responsible for the overall planning, organizing, and execution of all Information Technology functions. These responsibilities include directing all Information Technology operations to meet Military OneSource requirements as well as the support and maintenance of existing applications and development of new technical solutions.
- **Web Development Manager –** The primary responsibilities for this position include oversight and management of the Web Developer II and Web Develop III position. This position plays the role of a "hands-on" manager and assists in the development of applications for the EAP Website Presence.
- **Computer Operator III –** The primary responsibility for this position includes monitoring overall system performance (e.g., make sure "lights are on" and jobs are being processed), print management functions, queuing up any overnight jobs, managing computer batch processes and collaboration with the Computer Operator II.
- **Information Security Manager –** The primary responsibility of this position is to serve as the lead specialist in support of internal and external Information Assurance projects for Military OneSource.

- **Web Developer II** – The primary responsibilities of this position are to provide web development support services for the EAP Web Presence requirement including the overall blended public and EAP specific website. In particular, they implement the website structure, color pallet, accessibility features, perform maintenance of the overall website and collaborate with the Web Development Manager and Web Developer III.

CLIN X003: NON-MEDICAL COUNSELING

INTRODUCTION & OVERVIEW OF MAJOR ACTIVITIES

A mission-critical goal of the MOS program is to provide private, confidential non-medical counseling utilizing a short-term, solution focused counseling EAP model for eligible Participants. The core of ValueOptions' non-medical offering includes:

- **A seasoned, well-trained staff –** Our highly qualified staff have a complete understanding of the MOS program and the scope of practice for non-medical counseling. In addition, our comprehensively trained network – with our understanding of military culture, resources, chains of command, and installations – reduces the scope-of-practice risk on complex inquiries and cases.
- **A fully credentialed and growing network** – We learned, as we started developing our current MOS provider network, that simply transferring qualified providers from our extensive EAP and national provider networks would not be sufficient. Our MOS Provider Relations group works diligently to provide mandatory specialized trainings, program-specific paperwork, stringent timelines, reporting requirements, perform U.S. citizenship, criminal history background, and fingerprint checks to ensure that we maintain a network of experienced and well-trained providers.

BEST PRACTICES, CONTINUOUS SYSTEMIC AND OPERATIONAL IMPROVEMENT

Our team remains steadfast in our commitment to respond to the specific needs of the military community and demonstrate our commitment to continuous and systemic operational improvement. In the realm on non-medical counseling, ValueOptions focuses on improving user access and overall satisfaction with non-medical services.

- **Innovative solutions for engagement** – ValueOptions is constantly searching for innovative solutions to enhance our non-medical counseling services. As we continue to expand our MOS network, we have identified remote areas with a shortage of providers and accessibility issues for some of our members (e.g., Wounded Warriors).
- **Continued best practices** – We will continue to provide health and wellness coaching sessions to help individuals make healthier lifestyle choices and establish healthier habits in accordance with URAC and COA guideline. Similarly, our financial counseling teammate continues to provide critical financial services to military members and families to ensure that a member's readiness is not being undermined by financial problems or relationship challenges stemming from financial issues.

OVERVIEW & ESTIMATING APPROACH OF DIRECT LABOR & COSTS

Below is a listing of each session type within the Non-Medical Counseling CLIN. The subsequent narrative supports the cost buildup of each session type we are offering to the Government for Non-Medical Counseling services, including a breakdown and explanation for each major cost component. A full build-up of the cost detail can be found within the pricing model submitted with this proposal. As the incumbent contractor, we understand the unique challenges of training a successful staff, national and international networks to complete the objective of the Program. A summary of the fully burdened session cost and total cost can be found in the table below and is further discussed in this section of the CLIN narrative:

CLIN 0003: Non-Medical Counseling - Summary				
Session Type	**Units**	**Quantity**	**Unit Price**	**Extended Price**
Calculation		*I*	*II*	*III = I x II*
Situational Counseling In Person	Sessions	84,190	$ 92.46	$ 7,784,207
Situational Counseling Telephonic/Electronic	Months	5	39,330.00	196,650
Financial Counseling In Person	Sessions	195	155.45	30,313
Financial Counseling Telephonic/Electronic	Sessions	3,325	54.94	182,676
Health & Wellness Coaching Telephonic/Electronic	Months	5	9,799.50	48,998
Tax Telephonic	Sessions	8,765	54.94	481,549
Total				**$ 8,724,392**

Situational Counseling In Person – We burden our affiliate payments with the cost of our National Provider Network and Claims Processing corporate allocation as each function directly benefits Non-Medical Situational Counseling for the Military OneSource contract. <u>These costs support the overall ValueOptions EAP network, credentialing, general provider recruitment activities and the processing of all MOS claims. Furthermore, these costs are distinct and in addition to the MOS dedicated Provider Relations staff included within CLIN X005 pricing</u>.

CLIN 0003: Non-Medical Counseling - Situational Counseling In Person				
Affiliate Provider Network Session Rate	**G&A Burden**	**Profit**	**National Provider Relations and Claims Processing**	**Situational Counseling In Person Session Rate**
I	*II = I x 16.22%*	*III = (I+II) x 7%*	*IV*	*V = I+II+III+IV*
$ 63.50	$ 10.30	$ 5.17	$ 13.49	$ 92.46

Prior to and throughout our current contract, we have contracted with our national network of providers to provide Situational Counseling In Person for the MOS program. In general, and for the past 10 years with our commercial business, we were able to contract with our network providers at a rate of $60.00 per non-medical session. However, in certain situations such as geographic necessity (e.g., Alaska), we contracted rates higher than $60.00 Given this information and the unique

geographic make-up of the Military OneSource population, our weighted average affiliate payment has been $61.50 during our current bridge contract. In order to maintain a high-quality MOS network, ValueOptions estimates the weighted average affiliate payment for the MOS program to escalate to $63.50 for the duration of this bridge contract to accommodate for necessary rate adjustments and increased requirements for participating in the MOS network:

- **Situational Counseling Telephonic / Electronic –**ValueOptions utilizes licensed telephonic counselors to provide situational telephonic and electronic counseling for the MOS program. ~~Our per session cost is derived on our total price divided by the number of expected sessions based on our historical experience and the session basis projected in the RFP.~~ As recommend by the Government, ValueOptions has modified the pricing for the Situational Telephonic Counseling to reflect a monthly fixed price to capture the FTEs' fully burdened costs rather than generating a per session rate.

CLIN 0003: Non-Medical Counseling - Situational Counseling Telephonic/Electronic		
Fully Burdened Labor Cost for 4 Telephonic Counselors	**# of Months**	**Situational Counseling Telephonic/Electronic Session Rate**
I	*II*	*III = I/II*
$ 196,650.00	5	$ 39,330.00

- **Financial Counseling In Person –** Our Financial Counseling In-Person session rate is based on the affiliate payment made for each session burdened with ValueOptions' G&A and Profit burdens. The current affiliate payment for these sessions is in line with our current pricing:

CLIN 0003: Financial Counseling In Person			
Session Rate[1]	**G&A Burden**	**Profit**	**Financial Counseling In Person Session Rate**
I	*II = 1 x 16.22%*	*III = (I+II) x 7%*	*VI = I+II+III*
$ 125.00	$ 20.28	$ 10.17	$ 155.45

(1) Session Rate reflects rates paid to face to face counselors burdened with subcontractor's management fee.

- **Financial Counseling Telephonic / Electronic –** Financial/Tax Consultants provide 45-minute sessions telephonic/online financial counseling sessions. Our session rate reflects the session rate burdened with ValueOptions' G&A and Profit.

CLIN 0003: Financial Counseling Telephonic/Electronic			
WPO Telephonic/ Online Session Rate[1]	G&A Burden	Profit	Financial Counseling Telephonic/Electronic Session Rate
I	*II = 1 x 16.22%*	*III = (I+II) x 7%*	*VI = I+II+III*
$ 44.18	$ 7.17	$ 3.59	$ 54.94

(1) WPO's Telephonic/Online Session Rate reflects fully-burdened labor costs for a Financial/Tax Consultant to provide a 45-minute telephone/online financial counseling session.

- **Health & Wellness Coaching Telephonic / Electronic –** We estimated the price per session for Health & Wellness Coaching Telephonic / Electronic sessions based on the actual session volume experienced over the previous 12 months and productivity of our current staff. In our operations, we estimate four sessions per Health & Wellness Coaching case with initial session duration of 45 minutes and all subsequent sessions averaging 30 minutes in length. ValueOptions proposed one full FTE to support the estimated monthly session volume. In the event of any surge sessions or necessary backup, ValueOptions will leverage their subcontracting partners trained and qualified health & wellness coaches to ensure no disruption of service to Participants requesting these services. As recommended by the Government, ValueOptions has modified the pricing for the Health & Wellness Coaching Telephonic / Electronic coaching to reflect a monthly fixed price to capture the FTEs' fully burdened costs rather than generating a per session rate.

CLIN 0003: Health and Wellness Coaching Telephonic/Electronic		
Fully Burdened Labor Cost for 1 Health and Wellness Coach	# of Months	Health & Wellness Coaching Telephonic/Electronic Session Rate
I	*II*	*III = I/II*
$ 48,998	5	$ 9,799.50

- **Tax Telephonic** – Financial/Tax Consultants provide 45-minute sessions telephonic/online financial counseling sessions. Our session rate reflects the session rate burdened with ValueOptions' G&A and Profit.

CLIN 0003: Tax Telephonic			
WPO Tax Telephonic Session Rate[1]	G&A Burden	Profit	Financial Counseling Telephonic/Electronic Session Rate
I	*II = I x 16.22%*	*III = (I+II) x 7%*	*VI = I+II+III*
$ 44.18	$ 7.17	$ 3.59	$ 54.94

(1) WPO's Tax Telephonic Session Rate reflects fully-burdened labor costs for a Financial/Tax Consultant to provide a 45-minute telephonic tax counseling session.

CLIN X004: MISSION SUPPORT OPERATIONS

INTRODUCTION & OVERVIEW OF MAJOR ACTIVITIES

Our Mission Support Operations include the Joint Family Support Assistance Program (JFSAP) and Spouse Education and Career Opportunities (SECO) operations. JFSAP is for service personnel and their families who are located in geographically remote areas CONUS or CONUS. SECO provides a dedicated service to the 1.2 million military spouses of Service members with education and portable career development counseling and information via telephone and/or from the internet in the four pillars of the program (highlighted below). Major activities within each Mission Support Operation include:

Joint Family Support Assistance Program (JFSAP)

- **Community Capacity Building & Service / Family Member Education** – Our JFSAP teams identify gaps in service, barriers to care, and collaborates with federal, state and local agencies or groups to address them. They are proactive in their broad outreach and education initiatives, to make certain that military families know what MOS services are available to them, and how to access them.
- **Event Hosting & Coordination** – As of late October, our JFSAP team members have supported 1,975 Department of Defense (DOD) - approved events (1,618 with in-person support and 379,677 attendees, plus 357 with materials only and an estimated 66,860 attendees).
- **Management & Communication** – Three JFSAP Regional Consultant Managers support our JFSAP Consultants to ensure JFSAP activities support the MOS mission. They achieve quality by establishing performance objectives, reviewing after action reports and activity documentation, and conducting ongoing team training and individual coaching. Managers establish and mentor project teams to promote continuous improvement and use the JFSAPs' expertise.

Spouse Education and Career Opportunities (SECO) (Base Period Only)

- **Transition of the SECO Program** – At the request of the government, our team will make it a priority to transition the SECO Program to the vendor that has been selected to provide these specific services under the previously awarded separate contract. We shall cooperate and coordinate with the new vendor to ensure transition occurs seamlessly during the specified three-month timeframe.

During the transition process, our team will continue to operate the SECO program in adherence of the program's four pillars, highlighted below:

- o **Career Exploration / Discovery** – Our SECO teammates will provide spouses assistance with identifying career interests, aptitudes, and goals, high growth occupations, salaries, geographic factors and provide self-assessments.
- o **Career Education and Training –** The SECO team will help spouses identify career education/training requirements and service providers, state occupational licensing/credentials requirements and financial aid resources. This includes assistance with the MyCAA program.
- o **Career Readiness** – We will continue to assist spouses with resume preparation, interview techniques, and employment ready self-assessments for childcare, transportation and virtual work.
- o **Career Connections** – We provide spouses seeking employment assistance with identification of employers eager to hire military spouses and federal employment opportunities, which includes referrals to the DoD Military Spouse Employment Partnership (MSEP) program, USAjobs.gov and installation Family Support Center staff for linking to local employment opportunities.

BEST PRACTICES, CONTINUOUS SYSTEMIC AND OPERATIONAL IMPROVEMENT

We remain steadfast in our commitment to respond to the specific needs of the military community and demonstrate our commitment to continuous and systemic operational improvement.

- **Commitment to Staffing Veterans –** At contract award in October 2011, we successfully transitioned the seasoned, existing team of JFSAP consultants without disruption in service. Approximately 84% of the current JFSAP Consultants and Regional Managers are veterans, veteran spouses, or military family members. ValueOptions is committed to hiring and training JFSAP Consultants and management with military experience in an effort to promote continuous operational improvement based on their personal experiences.
- **Focus to Transition the SECO Program** – We are committed to collaborate with the government and incoming contractor in seamlessly transitioning the SECO program while maintaining operations throughout the required period.

OVERVIEW & ESTIMATING APPROACH OF DIRECT LABOR

Our staff works diligently to support the Mission Support Operations requirements of the contract. A summary of the total FTEs and total cost for each sub-CLIN can be found in the tables below and are further discussed in this section of the CLIN narrative:

CLIN 0004A: Joint Family Support Assistance Program (JFSAP)				
Direct Labor Category	FTE Count	% of Total Direct CLIN FTEs	Total Price	% of Total CLIN Price
JFSAP Consultant	55.00	89%	$ 2,564,925	88%
JFSAP Regional Consultant Manager	3.00	5%	171,984	6%
Event Coordinator	4.00	6%	162,810	6%
Total	**62.00**	**100%**	**$ 2,899,719**	**100%**

We based our JFSAP support staffing estimates on contract requirements and our historical experience through our current contract:

- **JFSAP Consultant** – The primary responsibility of this position is to serve the Service members and families who are geographically isolated from installation support through increased outreach and coordination of MOS program objectives. In addition, at the direction of the program, these staff support on-demand events (i.e., "ribbon cutting" ceremonies), and collaborate with programs and services to build coalitions and connect federal, state and local resources. As stipulated by PWS 9.1, we have proposed 55 JFSAP Consultants to support the program.
- **JFSAP Regional Consultant Manager** – Two of the three proposed JFSAP Regional Consultant Managers manage the JFSAP Consultants including operations management, performance management, assurance that events are being attended, and overall support of any questions from JFSAP Consultants. In addition, a designated Manager handles all the reporting requirements and manages the contracted support staff (Outreach Assistants), Event Coordinators and meetings / communication with the program staff. All managers work together and support the Director of Specialty Programs.
- **Event Coordinator** – The primary responsibility of this position is to support the JFSAP through the coordination of all JFSAP events directed by the program. The program office determines the events that JFSAP Consultants should be present at and the event coordinator orchestrates all activities necessary to run each event. This includes organizing travel, material requests, event details, and logistics for each event.

CLIN 0004B: Spouse Education and Career Opportunities (SECO) - Summary		
Direct Labor Category	Total Price	% of Total CLIN Price
Steady-State Operations Labor	$ 1,898,028	66%
Transition Out Non-Dedicated Labor	112,651	4%
Transition Out Severance & Retention Incentive Payments	708,422	25%
Transition Out ODCs	108,328	4%
Transition Out Travel	39,443	1%
Total CLIN Price	**$ 2,866,872**	**100%**

Our SECO staffing estimates are based on our historical experience and the specific contract requirements. At the direction of the program, we have provided estimates for each labor category for steady state operations and transition-out activities during the three-month timeframe within the Base Period of this contract.

Steady-State Operations Labor: Our pricing assumes all staff operating the SECO program today will remain fully dedicated to the SECO operations for the duration of the 3 months bridge contract. This includes the following labor categories:

- **Spouse Career Counselor** – The primary responsibility of this position is to support call center operations of the SECO Career Center. The counselors assist inquiring military spouses with assessing personal skills, interests and aptitudes and other career self-assessments; assistance with identifying, planning and evaluating educational and training goals; and one-on-one specialty education and career development consultations via the telephone.
- **Spouse Career Advisor** – The primary responsibility of this position is to support call center operations of the SECO Career Center. The advisors assist inquiring military spouses with assessing personal skills, interests and aptitudes and other career self-assessments; assistance with identifying, planning and evaluating educational and training goals; and one-on-one specialty education and career development consultations via the telephone.
- **School Liaison** – The primary responsibility of this position is to update and maintain databases, policies and process recommendations to the government, ensuring grades are posted, and outreach to post-secondary educational institutions regarding facilitating school recruitment.
- **Billing Specialist** – The primary responsibility of this position is to support the billing process with universities who support the SECO program.
- **Verification Specialist** – This position supports the onboarding, participation, recognition, support and general partnership communication with universities involved with the SECO program.

Transition Out Non-Dedicated Labor: In order to successfully transfer the SECO operations to the incoming contractor our team will need to allocate resources to perform transition out activities during the 3-month period. This staff includes:

- **President / Vice President (Talent Curve)** – The primary responsibility of this position is to lead the IT transition and configuration of the SECO program to the incoming contractor.
- **Finance Lead (Talent Curve)** – The primary responsibility of this position will be to work with the transition team to ensure accuracy with operating expenses, transition out expenses, benefits and severance.
- **Project Manager (Talent Curve)** – The primary responsibility of this position is to work with ValueOptions and the incoming contractor to coordinate and schedule all transition activities, provide weekly reporting on the transition progress and ensure all applicable property, processes and tools are included as part of the transition
- **ValueOptions IT Support** – ValueOptions will provide IT support to foster a seamless transition of all data and tools to the incumbent contractor. This includes efforts from the IT Quality Assurance

Specialist II, DB2 – DBA – II and Business Systems Analyst III labor categories during the transition.

Transition Out Severance and Retention Incentive Payments: In order to successfully maintain SECO operations and provide a seamless transition to the incoming contractor, ValueOptions will offer SECO staff a severance and retention incentive program. <u>ValueOptions confirms that SECO staff who leave before the end of the three--month period of performance for CLIN X004B, Spouse Education and Career Opportunities (SECO), will not receive a severance or retention incentive payment.</u> A detail of the program costs is explained below.

Entity	Severance Pay Program	Retention Incentives	Unpaid Sick Bonus	Total Payments	G&A Burden	Total Cost	% of Total CLIN Price
Calculation	*I*	*II*	*III*	*IV = I+II+III*	*V = IV x 16.22%*	*VI = IV+V*	
Prime	$ 100,300	$ -	$ 1,672	$ 101,971	$ 16,540	$ 118,511	4%
Talent Curve	135,582	372,000	-	507,582	82,330	589,911	21%
Total Severence and Retention	**$ 235,881**	**$ 372,000**	**$ 1,672**	**$ 609,553**	**$ 98,869**	**$ 708,422**	**25%**
Total CLIN Price						**$ 2,866,872**	**100%**

CLIN 0004B: Spouse Education and Career Opportunities (SECO) - Severence & Retention

- **Severance Incentive Payment –** Staff will be encouraged to remain through the end of the MOS bridge contract through a severance package plan. We recognize not all employees will stay to the end of the contract, as such a 24.5% reduction in staff severance was applied to account for employees leaving before the contract expiration. All severance rates are based on an hourly salary rates.
- **Retention Incentive Payment –** Staff will be encouraged to remain through the end of the MOS bridge contract through a retention incentive. The retention incentive will include COBRA health insurance and career counseling for six months after the Military OneSource bridge contract ends. We recognize not all employees will stay to the end of the contract, as such a 24.5% reduction in staff retention was applied to account for employees leaving before the contract expiration.
- **Partial Sick Accrual Payout –** ValueOptions' staff will be encouraged to be at work during the final months of the contract and not call-in "sick," through a partial sick accrual payout program. Employees will receive a payout equal to 25% of their accumulated sick balance at time of their separation date. As previously discussed, a 24.5% reduction in staff partial sick accrual payout was applied to account for employees leaving before the contract expiration.

Transition Out Other Direct Costs (ODCs) and Travel: Talent Curve will incur non-labor costs due to the transition out of the current contract which we have included in the pricing of the contract. These costs include unamortized depreciation associated with computer and IT services, continued lease expense, ongoing principle bank payments, and travel associated with the transition out of the contract.

CLIN X005: PROGRAM MANAGEMENT

INTRODUCTION & OVERVIEW OF MAJOR ACTIVITIES

Our established dedicated program management team delivers consistent, high-quality services to MOS Participants. Our team demonstrates knowledge and experience in dealing with military quality of life programs. In fact, 58% of ValueOptions' MOS staff are either current, retired military, or have a family member in the military. The major activities contained in the Program Management CLIN include:

- **Ensuring Program Readiness** – Our program management team fosters a learning environment ensuring our nearly 400 staff receives the proper training and technological processes needed to ensure the Participants we so proudly serve receive the services they need.
- **Interfacing with the MC&FP Office** – Our program management team and key personnel meet with the Program Office for monthly reporting meetings, DIACAP, specialty program consultations, and any other requests of the program. We look forward to continued participation in a variety of Government meetings including roundtable meetings.
- **Duty to Warn and Mandated Reporting** – We understand the importance to adhere to all Government MOS processes and procedures for Duty to Warn and mandated reporting issues. Our team continues to respond to the Government's evolving needs around Duty to Warn and mandated reporting.
- **Quality Control Plan** – Our program management team manages our comprehensive Quality Control Plan to ensure continued success and enhancement of the MOS program.
- **Data Collection, Retention and Documentation** – Our program management team manages the overall MOS program to ensure proper data collection, retention and documentation of all Participant interaction is available for the MC&FP Office.
- **System Compliance, Redundancy and Security** – The program management team provides the necessary support to establish, maintain and enhance a robust DISA/DoD compliant Information Assurance (IA) capability. The team also provides the necessary support to ensure continuity of services to meet in accordance with the requirements of the contract.

BEST PRACTICES, CONTINUOUS SYSTEMIC AND OPERATIONAL IMPROVEMENT

Our team remains steadfast in our commitment to respond to the specific needs of the military community and our commitment to demonstrate continuous and systemic operational improvement. Our program management team continues to refine our management approach of the MOS contract to better address the needs of the Government and MOS Participants.

- **Commitment to Duty to Warn Practices** – Our program management team has dedicated significant time and resources to implement established Government MOS processes and procedures. We fully understand our obligations as they apply to Duty to Warn and mandated issue reports.
- **Data Reporting** – Our program management team continues to work with the government to provide on-demand reporting.

OVERVIEW & ESTIMATING APPROACH OF DIRECT LABOR

We based our Program Management staffing on contract requirements and our historical experience through our current contract. Below is a summary of the total FTEs and total cost as well as a description of labor categories representing over 90% of the total CLIN cost:

Direct Labor Category	Direct FTE Count	% of Total Direct CLIN FTEs	Total Price	% of Total CLIN Price
CLIN 0005: Program Management				
Key Personnel				
Program Director	1.00	3%	$ 151,944	8%
Deputy Program Director	1.00	3%	132,952	7%
Director of Non-Medical Counseling	1.00	3%	102,064	6%
Director of Quality Control	1.00	3%	78,120	4%
Director of Call Center Operations	1.00	3%	100,544	5%
Director of JFSAP & Specialty Consultants	1.00	3%	65,768	4%
Financial Manager [1]		-	-	0%
Contract Administrator [1]		-	-	0%
Subcontractor Manager[1]		-	-	0%
Other Program Management Staff				
Clinical Quality Auditors	7.00	21%	$ 336,420	18%
Clinical Trainer	4.00	12%	203,730	11%
Technical Trainer	2.00	6%	84,435	5%
Administrative Assistant	3.00	9%	82,913	5%
Quality Manager	1.00	3%	66,360	4%
Manager of Clinical Quality Auditors	1.00	3%	57,832	3%
Provider Relations Director	1.00	3%	59,664	3%
Provider Relations Manager	2.00	6%	78,704	4%
Provider Relations Representative	3.50	10%	113,584	6%
Provider Relations Specialist	1.00	3%	26,985	1%
Website Editor II	1.00	3%	52,425	3%
Quality Analyst	1.00	3%	43,680	2%
Total	**33.50**	**100%**	**$ 1,838,123**	**100%**

Key Personnel

- **Program Director** –The Program Director works directly with the Contracting Officer, Contracting Officer Representative and the Government Program Manager to accomplish the goals and objectives of the MOS program. This person also has the authority to speak and act on behalf of ValueOptions with the DoD.

- **Deputy Program Director –** This is a key person for the Military OneSource program. The primary responsibility of this position is to assist the Program Director in managing this contract and has the ability to act in the absence of the Program Director.
- **Director of Non-Medical Counseling –** This is a key person for the Military OneSource program. The primary responsibilities for this position include all aspects of service delivery related to the clinical consultants' delivery of emotional well-being and other counseling sessions, detailed research on general and technical subjects with outreach to various agencies, reporting and analytics for the business and specialty teams (e.g., Legal team, Management Services).
- **Director of Quality Control –** The Director of Quality Control directs the operation of the Quality Control Program for the MOS Program and serves as the point of contact for Utilization Review Accreditation Commission (URAC) compliance initiatives.
- **Director of Call Center Operations** – The primary responsibilities of this key personnel include managing the Call Center Managers, overseeing the Call Center Operation (i.e., multiple locations, review of workflows) and reporting Call Center metrics on behalf of the program. This key person is 100% dedicated to the MOS program.
- **Director of JFSAP & Specialty Consultants –** The primary responsibility of this position is the oversight of the overall JFSAP including JFSAP Regional Consultant Mangers, Event Coordinators, and JFSAP Consultants as well as oversight during the duration of the SECO program transition.
- **Financial Manager –** ValueOptions retains this position within our G&A function. The primary responsibility of this position is to develop and analyze all fiscal systems, processes and reports. The financial manager ensures all systems processes and reports meet the contract objectives and requirements. This person is also responsible for compliance reviews, overseeing the general ledger, accounts payable, financial statements, and all pricing aspects of the Military OneSource Program.
- **Contract Administrator –** ValueOptions retains this position within our G&A function. This position is responsible for the full administration of the Military OneSource contract, including all subcontracts. This person serves as a business advisor and compliance monitor of contract and subcontracting agreements. These functions include negotiating terms, tracking compliance with contracts, responding to internal government and contracting agency inquiries. The Contract Administrator provides supervision to the Subcontractor Manager.
- **Subcontractor Manager –** ValueOptions retains this position within our G&A function. The primary responsibility of this position is to establish standards of service for measuring performance provided by all MOS subcontractors/vendors. The Subcontractor Manager monitors subcontractor compliance with all contract requirements and performance standards, conducts service audits, and addresses any service concerns. The Subcontractor Manager interacts with subcontractors on a range of issues, such as implementation, interface questions, operational flow, relationship management, and issues, potential service issues/compliments, etc.

Other Program Management Staff

- **Clinical Quality Auditors** – The primary responsibility of this position is to conduct quality audits of case reviews for Triage Consultants and Researchers. This staff is comprised of experienced, licensed clinicians who evaluate cases for proper scope and whether the correct policies and procedures were followed from initial triage to progress notes and case closure. We based our staffing levels for this position on our historical span of control of Triage Consultants and Researchers to Clinical Quality Auditors.
- **Clinical Trainer** – The primary responsibility of this position is to design and deliver training on the program requirements, non-medical counseling, duty to warn, confidentiality and overall military culture for the program staff.
- **Technical Trainer** – The primary responsibility of this position is to train staff on the telephony systems, case management system, resource databases, and all technical resources utilized by the program.
- **Administrative Assistant** – ValueOptions dedicates 3 Administrative Assistants to the Military OneSource operations; they are located in the primary call center locations (Arlington (1), Chesapeake (2)).
- **Quality Manager -** The Quality Manager is responsible for all quality related activities and reporting associated with the MOS Program, including the development of a comprehensive quality control plan. The Quality Control Manager ensures ValueOptions meets all timeframes and deliverables and reviews all reports for accuracy and detail prior to submission to the government.
- **Provider Relations Staff** – This function includes the Provider Relations Director, Provider Relations Manager, Provider Relations Representative and Provider Relations Specialist labor categories. This staffs are dedicated to the MOS program and support the ongoing maintenance of the MOS provider network.

CLIN X006: STRATEGIC OUTREACH --LABOR

INTRODUCTION & OVERVIEW OF MAJOR ACTIVITIES

We continue to support the MOS goal of raising awareness of the program for Participants with emphasis on Service members and their families, military leaders and service counselors through Strategic Outreach activities. Within this CLIN pricing, key labor activities related to Strategic Outreach include:

- **Content Development** – We develop promotional materials at the direction of the Government MOS Program Office. We provide practical information to help Participants take better advantage of MOS services. These easily accessible resources enable service personnel and their families to confront and manage their particular challenges.
- **Providing Education, Informational and Referral Information** – We coordinate the fulfillment of awareness materials requested by MOS eligible Participants including the capability of receiving MOS client fulfillment requests originating from Government applications (e.g., EAP website).
- **Webinar Support** – We facilitate, at the direction of the Government MOS Program Office, online webinars on EAP topics and topics of interest to the military community.

BEST PRACTICES, CONTINUOUS SYSTEMIC AND OPERATIONAL IMPROVEMENT

We remain steadfast in our commitment to respond to the specific needs of the military community and demonstrate our commitment to continuous and systemic operational improvement. With this goal in mind, we have committed our operations to strengthen our value proposition offered the government.

- **Award-Winning, Robust Catalog of Materials –** Our award-winning catalog of information addresses 200+ topic areas with articles, quizzes, trainings, calculators, relocation tools, provider search tools (e.g., child and adult care, schools), workbooks, audio files and videos and is continuing to expand through ongoing collaboration with the Government MOS Program Office.
- **Automated Fulfillment Solution –** We continue to work on automated fulfillment solutions to provide the best value and timely delivery to the Government and MOS Participants.

OVERVIEW & ESTIMATING APPROACH OF DIRECT LABOR

Our dedicated staff supports Strategic Outreach and Fulfillment requirements of the contract. A summary of the total FTEs and total cost can be found in the table below and is further discussed in this section of the CLIN narrative:

Direct Labor Category	FTE Count	% of Total Direct CLIN FTEs	Total Price	% of Total CLIN Price
CLIN 0006: Strategic Outreach -- Labor				
Content Specialist	1.00	48%	$ 57,833	54%
Fulfillment Coordinator	1.00	48%	43,883	41%
Content Specialist (WPO)	0.10	5%	4,716	4%
Total	**2.10**	**100%**	**$ 106,431**	**100%**

All staffing estimates are based on our historical staffing levels and our intimate knowledge of the program requirements and specifications. Below is a description of labor categories representing over 95% of the total CLIN cost

- **Content Specialist –** The primary responsibility of this position is to develop the content necessary webinars each month. As the incumbent contractor, ValueOptions spends approximately 10 - 12 hours to develop each webinar's content, provide close captioning the webinar, complete training of the webinar presenter and coordinate with program staff to manage and facilitate the webinar activity.
- **Fulfillment Coordinator –** The primary responsibility of this position is to work with our fulfillment vendor (RR Donnelley) and the MOS Program Office to make sure the vendor fills all requests for marketing materials; this includes the shipment of all catalogs through the fulfillment vendor, material shipments to service members, providers, and Joint Family Support Assistance Program events. Today, this equates to hundreds of thousands of materials per month.

CLIN X007: FACILITIES LEASE AND OPERATIONAL COSTS

INTRODUCTION & OVERVIEW OF MAJOR COSTS
Facilities Lease and Operational Costs are material, non-labor items required to fulfill the requirements of the solicitation. ValueOptions and our subcontractors estimated these costs using current contract experience and actual lease contracts. ValueOptions burdens G&A cost on all Facilities Lease and Operational Costs to account for the overall management and administration of working with various vendors and subcontractors to procure these materials and services. No profit has been applied to costs within this CLIN.

Major costs within this CLIN are in the exhibit below and are further discussed in this section of the CLIN narrative.

CLIN 0007: Facilities Lease and Operational Costs			
Other Direct Cost	Vendor/ Subcontractor	Total Price	% of Total CLIN Price
Capital Lease Hardware & Maintenance Expense	Various	$ 2,703,016	66%
ValueOptions Facilities Lease Expense	Various	1,275,115	31%
Subcontractor & Vendor Operating Expenses	Various	102,029	3%
Total		**$ 4,080,159**	**100%**

- **Capital Lease Hardware & Maintenance Expense** – These costs include the monthly lease costs for all capital hardware, software and maintenance necessary to operate the MOS contract. These costs are based on existing contracts with our vendors to provide these materials and services. and are aligned with our current expenses.
- **ValueOptions Facilities Lease Expense** – This includes the total monthly facility costs to operate the primary call centers for the MOS operations. ValueOptions has increased the cost for the Facilities Lease expense to account for the actual increase in costs associated for running the 24/7/365 call center locations in Arlington, VA and Chesapeake, VA (e.g., air conditioning, electricity).
- **Subcontractor & Vendor Operating Expense** – This includes total monthly facility costs for Talent Curve and WPO separate facilities as well as costs for offsite tape storage. These costs are based on experience under the current operations.

CLIN X008: OTHER DIRECT COSTS

INTRODUCTION & OVERVIEW OF MAJOR COSTS
Other Direct Costs are material, non-labor items required to fulfill the requirements of the solicitation. ValueOptions and our subcontractors estimated Other Direct Costs using current contract experience in combination with the workloads provided in the solicitation. ValueOptions burdens G&A cost on all

Other Direct Costs to account for the overall management and administration of working with various vendors and subcontractors to procure these materials and services. No profit has been applied to costs within this CLIN.

Major other direct costs can be found in the exhibit below and are further discussed in this section of the CLIN narrative.

CLIN 0008: Other Direct Costs (ODCs)			
Other Direct Cost	**Vendor/ Subcontractor**	**Total Price**	**% of Total CLIN Price**
Strategic Outreach, Storage and Fulfillment	RR Donnelly	$ 439,691	25%
Document Translation Services	CLC	433,694	25%
Income Tax Return Filings (Federal and State)	H&R Block	251,199	14%
Verizon Collocation Services	Verizon	170,878	10%
Outreach Assistants	Various	104,790	6%
Health & Wellness Content	Convergence	79,241	4%
WorkLife Web Portal and Tools	WPO	72,638	4%
Essential Learning Training Costs	Essential Learning	41,839	2%
Finger Prints and Background Checks	Various	39,970	2%
All Other Direct Costs	Various	135,910	8%
Total		**$ 1,769,849**	**100%**

- **Strategic Outreach Storage, Fulfillment, and Shipping –** ValueOptions uses R.R. Donnelley to provide storage, fulfillment and shipping of educational and informational materials and referral information normally provided as part of EAP support services. Based upon our historical MOS experience and the Proposed 2013 Military OneSource Fulfillment Materials list, ValueOptions assumes storage costs for the proposed number of skids (pallets) and bins of materials below. R.R. Donnelley charges a monthly fee for each skid and bin depending upon duration of storage. Based on our historical experience, ValueOptions estimates that 50% of skids and bins are stored for less than 7 months and 50% of skids and bins are stored for more than 7 months. R.R. Donnelley charges two fees related to the fulfillment process: 1) a requisition fee (charge per order) and 2) a line-handling fee (charge per line for each order) R.R. Donnelley also leverages their

CLIN 0008: Other Direct Costs (ODCs) - Strategic Outreach Storage, Fulfillment, and Shipping			
Cost Type	**Rate**	**Annual QTY**	**Cost**
Calculation	*I*	*II*	*III = I x II*
Storage Cost			
Skids (stored fewer than 7 months)	$ 9.85	2,250	$ 22,163
Skids (stored more than 7 months)	14.78	2,250	33,255
Bins (stored fewer than 7 months)	4.50	500	2,250
Bins (stored more than 7 months)	6.75	500	3,375
Total Storage Cost			$ 61,043
Fulfillment Cost			
Requisition Fee (fee per order)	1.41	12,000	16,920
Line Handling Fee (fee per line per order)	1.65	60,000	99,000
Total Fulfillment Cost			$ 115,920
Total Shipping Cost			$ 201,364
G&A Cost	*16.22%*		$ 61,365
Total Strategic Outreach Storage, Fulfillment, and Shipping Cost			**$ 439,691**

volume discounts to ship the materials ordered to the member, provider or ValueOptions staff. Shipping costs reflect historical shipping costs.

- **Document Translation Services** – To meet the translation needs of MOS Participants, ValueOptions engages Comprehensive Language Center, Inc. (CLC) to provide document translation services. ValueOptions reimburses CLC based upon the number of words translated per document and the language translated. ValueOptions estimated the annual number of translated documents based upon the monthly number of documents translated as provided in the solicitation. Based upon our historical MOS experience, ValueOptions assumes the distribution of languages provided below. Additionally, ValueOptions estimated the expected cost per document, by language, based upon the average number of words per document translated today. CLC imposes a minimum translation cost per document of $175.00. The exhibit below summarizes translation costs by language.

CLIN 0008: Other Direct Costs (ODCs) - Document Translation				
Language Translated	**Rate**	# of Documents	Cost Per Document	Total Translation Cost Per Language
Calculation		*I*	*II*	*III = I x II*
Spanish to English		666	$ 175.00	$ 116,550
German to English		509	235.80	120,022
French to English		105	175.00	18,375
Italian to English		131	175.00	22,925
Portuguese to English		34	175.00	5,950
English to German, Russian, Italian,		161	237.70	38,270
Other		240	212.81	51,074
Subtotals		1,846	$	373,166
G&A Cost	*16.22%*			60,528
Total Translation Cost			$	433,694

- **Federal and State Income Tax Return Filings** – ValueOptions will continue to use H&R Block to provide free federal and state tax filing services to Military OneSource Participants. H&R Block charges ValueOptions $1.00 per return. ValueOptions used the workload volume provided in the 2012 re-compete solicitation to estimate the total number of state and federal income tax returns assuming all returns will be processed during the Base Period operations (February to June timeframe).

CLIN 0008: Other Direct Costs (ODCs) - Tax Filings (H&R Block)					
Return Type	Rate Per Tax Return	G&A Rate	Fully Burdened Rate	Annual Number of Tax Returns	Total Annual Tax Return
Calc	*I*	*II*	*III = I x II*	*IV*	*V = III x IV*
Federal Income Tax Return	$ 1.00	16.22%	$ 1.16	123,917	$ 143,744
State Income Tax Return	1.00	16.22%	1.16	92,634	107,455
Total				**216,551**	**$ 251,199**

- **Verizon Colocation Services –** ValueOptions pays Verizon a monthly service fee to support the colocation services for the Military OneSource contract. ValueOptions has estimated the cost of this service based on actuals under the current MOS contract.
- **Outreach Assistants –** As the incumbent contractor, we understand the unique, continuous needs of the JFSAP and the need for a dynamic staffing solution to service the requirement of up to 300 events, in person, or virtually, and provide materials for up to 80 events per month. Today, we successfully support the JFSAP through a surge staff of Outreach Assistant contractors. This staff assists JFSAP Consultants in instances where multiple events may take place on the same day in a given state. ValueOptions has estimated the costs associated with Outreach Assistants based upon our current utilization of their services under the current MOS contract.
- **Website Content –** ValueOptions has engaged Convergence and WorkPlace Options to provide health and wellness website content as well as worklife website content, portal and tools, respectively. This content is required to maintain a web presence that supports EAP online services offered only to eligible Participants. ValueOptions has estimated the cost of this content based on the monthly fee charged by each vendor.
- **Essential Learning Training Costs–** ValueOptions uses Essential Learning's provider training module to provide access and administer 14 government-approved trainings through a secure website. ValueOptions has already incurred a one-time set up fee and will not incur this cost again. ValueOptions has estimated monthly access fees of $7,200 throughout the life of the contract based upon our current agreement with Essential Learning.
- **Finger Prints and Background Checks** – In accordance with PWS 5.0.9 and under our current contract, all of our MOS staff, network providers, and supervisors have already submitted required documentation and undergone credentials review and verification. ValueOptions re-credentials our providers every three years, which includes reviewing the provider's history for malpractice claims, loss of license, felony convictions, loss or limitation of privileges, disciplinary action, and illegal drug use. Fingerprint checks will be performed every five years. ValueOptions uses Accurate Background to provide Criminal History Background Checks at the required level described in DoD Instruction No. 1402.5 for all non-medical counselors/providers. ValueOptions has estimated the additional cost associated with higher-level background checks based upon the average actual costs incurred today. ValueOptions assumes we will incur these additional costs to add 100 additional providers per month to our MOS network. ValueOptions also ensures Providers complete Fingerprint checks at the required level described in DoD Instruction No. 1402.5. The cost of fingerprint checks varies by state; therefore, ValueOptions estimated the average cost of fingerprint checks based upon our historical MOS experience. ValueOptions assumes we will add 100

additional providers per month and will incur these additional charges as ValueOptions adds new providers to the network.

CLIN X009: TRAVEL

INTRODUCTION & OVERVIEW OF MAJOR COSTS
Travel expenses are material, non-labor items required to fulfill the requirements of the solicitation based on ValueOptions facility structure and operational practices. We have estimated travel for the contract based on historical experience in operating the Military OneSource contract. Consistent with corporate best practices, ValueOptions' utilizes technology solutions to limit travel to trips deemed necessary by ValueOptions and the program. No profit has been applied to costs within this CLIN.

CLIN X010: TRANSITION OUT

DEFINITIZATION OF TRANSITION OUT PRICING
At the direction of the government, with the exception of the SECO program transition-out costs which have been priced within CLIN 0004B, all Military OneSource transition out pricing "shall be definitized post award." As such, we have not provided a pricing estimate within this proposal submission.

PRICING ASSUMPTIONS

- **Direct Labor Approach** –ValueOptions used historical operational data, productivity rates, and resource allocation statistics as a starting point for developing direct labor costs. Direct labor costs were then adjusted based on assumptions about changes in MOS workloads, integration of new technologies, and expected efficiencies across functional areas.

- **Productive Hours** – ValueOptions assumed 1,800 productive labor hours per year for all ValueOptions ~~management and~~ staff and 1,920 productive labor hours per year for all ValueOptions management. Productive hours for subcontracted labor were prescribed by the subcontractor. All productive hour assumptions can be found in worksheet "12.2_Labor Hours."

- **Direct FTE Calculation** – ValueOptions and subcontractor FTEs were calculated by dividing annual FTEs by the productive hours assumption in the worksheet "12.2_Labor Hours."

- **Fully Burdened Hourly Rates** – ~~All ValueOptions~~ For ValueOptions staff, hourly rates were calculated by dividing the total salary for a given position~~, including overtime~~, by ~~2,080~~1,800 hours. For ValueOptions management, hourly rates were calculated by dividing the total salary for a given position, by 1,920. All ValueOptions hourly rates were burdened with ~~fringe,~~ overhead, G&A, and profit. Subcontractor rates were calculated by dividing the total salary by the prescribed productive hours found in the worksheet "12.2_Labor Hours." Subcontractor rates were burdened with ValueOptions' G&A and profit only.

- **Labor Escalation Rates** – No labor escalation was applied to ValueOptions management and staff from Base Period through Option Period 2, as the period of performance is entirely within the 2013 calendar year. No labor escalation was applied to subcontracted labor from Base Period through Option Period 2, as the period of performance is entirely within the 2013 calendar year.

- **Provider Reimbursement Increase** – ValueOptions assumed no increase in Provider Reimbursement rates from Base Period through Option Period 2, as the period of performance is entirely within the 2013 calendar year.

- **ODC Escalation Rates** – ValueOptions assumed no increase of ODCs from Base Period through Option Period 2, as the period of performance is entirely within the 2013 calendar year.

- **Profit** – ValueOptions applied a profit rate of 7% for all CLINs unless stated otherwise in Section L of the solicitation (profit was not included for costs in CLIN X008 Other Direct Costs and CLIN X009 Travel, as well as certain costs (Transition Out ODCs and Travel expenses) in CLIN X004B SECO).

- **Contract Award** – Contract award date is February 1, 2013

- **Indirect Rate Approach** – ValueOptions used the current Federal Division's 2012 Actual & Budgeted Indirect Rates as a starting point for calculating the ~~fringe,~~ overhead, and G&A rates applied in the pricing volume. ValueOptions adjusted the overall Federal Division rates to reflect more accurately reflect the level of effort and specific costs associated with operating the MOS contract. Key adjustments included:

  - *ODCs, Direct Labor, and Subcontracted Labor* – ValueOptions adjusted these key cost categories to reflect efficiencies expected in the MOS Future State as described in the Volume II – C.1: Cost Realism Narrative and Volume I: Technical & Management Approach.

  - *National Provider Network and Claims Processing Allocation* – The allocation for National for Provider Network Relations and Claims Processing functions will directly support all Situational Counseling In Person. To reflect this pricing structure accurately,

ValueOptions has removed this cost from the overhead pool and is applying the applicable portion of the burden directly to all Provider Situational Counseling sessions.

- o ~~ValueOptions' leadership team applied a management reduction to our overhead rate to offer a more competitive price to the government~~
- **Fringe Rate** – ~~ValueOptions has applied fringe to all ValueOptions management and staff labor positions. Fringe benefits include health insurance, dental insurance and payroll taxes. All indirect rates, including fringe, can be found in worksheet "12.0_Summary of Rates."~~ ValueOptions' fringe costs (i.e., expenses such as health insurance, payroll taxes and other benefits) are included within the Overhead pool for the Military OneSource contract. All fringe costs associated with non-productive time for employees is imbedded within the base hourly rates offered to the government (i.e., salary is divided by only productive time).
- **Overhead Rate** – ValueOptions has applied overhead to all ValueOptions management and staff direct labor positions. The overhead rate includes costs such as facilities overhead, HR and IT allocations and other labor or supplies that support the MOS contract. ValueOptions' leadership team applied a management reduction to our overhead rate to offer a more competitive price to the government
- **General & Administrative Rate** – All costs are burdened with G&A, including travel, ODCs, and subcontractor costs.

OVERVIEW OF VOLUME II – TAB D: PRICE TABLES

ValueOptions provided the following Price Tables under Volume II – Tab D: Price Tables in accordance with the direction of the Government and Section L.17 of the solicitation:

- **D.a: Labor Rates**
  - o **D.a.1: Labor Rates** – This price table provides the fixed labor rates, hourly and monthly, for all labor categories proposed for this contract. Labor rates cover the base period and both option periods of performance.
  - o **D.a.2: Productive Hours** – This price table states the number of annual productive labor hours for ValueOptions employees and all subcontractors. The basis for determination includes estimated annual leave, sick leave, holidays, personal days, and other leave time.
- **D.b: Escalation Rates –** Per conversations with the program office, escalation rates by period of performance for all costs in ValueOptions' proposal can be found within the pricing model (D f.1_Pricing Model). Since the duration of the contract is entirely within 2013, ValueOptions has not applied an escalation rate from Base Period through Option Period 2 to any costs, which is reflected on worksheet "12.0_Summary of Rates."
- **D.c: Other Direct Cost Data** – Per conversations with the program office, other direct cost data can be found within the pricing model (D.f.1_Pricing Model) reflected on schedule "11.1_Inputs_ODCs." The fully burdened unit price build-up for all ODCs by period of performance, including quantity, unit cost, G&A cost, and basis of estimate may be found within the abovementioned scheduled. ODCs do not include profit.
- **D.d: Travel** – Per conversations with the program office, travel cost data can be found within the pricing model (D.f.1_Pricing Model) reflected on schedule "11.3_Inputs_Travel." Travel costs do not include profit.

- **D.e: Additional Charges** – Per conversations with the program office, additional charges cost data can be found within the pricing model (D.f.1_Pricing Model) reflected on schedule "11.2_Inputs_Additional Charges." All additional charges by period of performance, including the purpose, unit cost, G&A cost, total price, and basis of estimate may be found within the abovementioned schedule. Additionally, for charges from subcontractors, this schedule includes the function the subcontractor supports and to which socio-economic group the subcontractor belongs. Additional charges do not include profit.
- **D f: Auxiliary Supporting Price Data**
    - **D.f.1: Pricing Model** – This Excel workbook calculates the proposed price of the contract. Please see "Overview of D.f.1: Pricing Model" section below for explanation of workbook structure.
    - **D.f.2: Summary of Indirect Rates** – This price table provides a summary of the indirect rates that are utilized in ValueOptions' proposal. The Excel workbook contains the following worksheets:
        - **Lead** – This worksheet provides a statement explaining the process used to highlight revised final proposal revision (FPR) pricing to the Government.
        - **Summary** – This worksheet provides a summary of all indirect rates included in ValueOptions' pricing proposal, including our G&A Rate, Overhead Rate, and Fringe Rate (Note: ValueOptions included fringe expenses as part of its Overhead Rate, as opposed to a separate Fringe Rate). The worksheet provides rates for Base Period and all Option Periods. See Tab C.1 (Cost Realism Narrative) for additional detail on how rates for each year are developed.
        - **A_G&A** – This worksheet calculates the baseline G&A rate for the Military OneSource proposal on a summary level. ValueOptions used our FY2012 Cost Model as a starting point and then made adjustments to reflect future state Military OneSource operations.
        - **B_Overhead** – This worksheet calculates the Overhead rates for the Military OneSource proposal on a summary level. ValueOptions used our FY2012 Cost Model as a baseline and then made adjustments to reflect future state Military OneSource operations. ValueOptions' leadership team applied a management reduction to our overhead rate to offer a more competitive price to the government
        - **C_Fringe** – ~~This worksheet calculates the Fringe rates for the Military OneSource proposal on a summary level. ValueOptions used our FY2012 Cost Model as a baseline and then made adjustments to reflect future state Military OneSource operations.~~ ValueOptions' fringe costs (i.e., expenses such as health insurance, payroll taxes and other benefits) are included within the Overhead pool for the Military OneSource contract. All fringe costs associated with non-productive time for employees is imbedded within the base hourly rates offered to the government (i.e., salary is divided by only productive time).
        - **D_Adjustments** – This worksheet contains the adjustments to our FY2012 Cost Model Indirect rates in order to develop rates that reflect the Military OneSource future state operations.
        - **E_Inputs** – This schedule contains the inputs ValueOptions used to adjust our FY2012 Cost Model indirect rates in order to develop rates that reflect the Military OneSource future state operations.

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- **D.g: Professional Compensation Plan Pricing** – This price table contains the pricing information that supports the Professional Compensation Plan submitted in Volume II – Tab F: Professional Compensation Plan. The price table provides an overview of ValueOptions' compensation pricing methodology, sample job pricing data, and a summary of the geographic differentials used in ValueOptions' base pay program.
- **D.h: Subcontracting Plan Pricing** – This price table contains the pricing information that supports the Subcontracting Plan submitted in Volume II – Tab E: Subcontracting Plan.
- **D.i: CLIN Structure (J-I)** – This price table provides ValueOptions' total price, inclusive of all optional quantities, by period of performance. For the CLINs listed below, ValueOptions followed the specific pricing instructions listed in Section L of the solicitation:
    - For CLIN X001, ValueOptions priced all tiers individually and then applied the likelihood of performance to calculate total contract price for all periods.

    - For the Situational Counseling, Financial Counseling In Person, Financial Counseling Telephonic/Electronic, and Tax Telephonic sessions within CLIN X003, ValueOptions listed our fully burdened session price for each session type and then multiplied the session rate by the number of sessions to calculate total contract price for each session type and period of performance.

    - At the direction of the government, for the Situational Counseling Telephonic/Electronic and Health & Wellness Coaching Telephonic/Electronic sessions within CLINX003, ValueOptions listed our fully burdened monthly price for each session type and then multiplied the monthly rate by the number of months within the period to calculate total contract price for each session type and period of performance.

OVERVIEW OF D.F.1: PRICING MODEL

ValueOptions utilized the following Excel workbook structure to calculate the proposed price of the contract. A list of all supporting worksheets in "D f.1_Pricing Model xlsx" can be found in Appendix A at the end of this document:

D.f.1_Pricing Model.xlsx Workbook Structure by Schedule Type
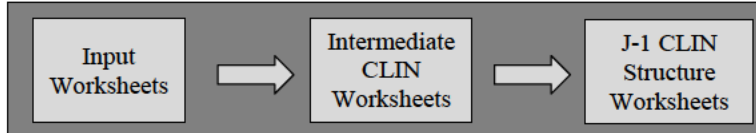
Additional Worksheets Added for FPR Response
- **Lead** – Statement Regarding FPR (overview of process used to highlight revised pricing to the Government)

Input Worksheets

The following worksheets provide the inputs for the intermediate CLIN worksheets:

- **11.0_Inputs_Staffing** – This worksheet provides staffing levels for all labor categories by CLIN, location, position type, functional area, and location for each call volume tier for Base Period and all Option Periods.

- **11.1_Inputs_ODCs** – This tab provides the other direct costs by CLIN, prime or subcontractor, functional area, proposed vendor, basis of estimate, unit, and unit cost for each ODC in Base Period and all Option periods. General and administrative (G&A) cost is applied to arrive at our burdened unit price. Also provided is the number of units for each period.

- **11.2_Inputs_Additional Charges** – Similar to ODCs, this tab provides additional charges by CLIN, prime or subcontractor, functional area, proposed vendor, basis of estimate, unit, and unit cost for each charge in Base Period and all Option Periods. General and administrative (G&A) cost are applied to arrive at our burdened unit price. Also provided is the number of units for each period.

- **11.3_Inputs_Travel** – This tab provides total travel expenses for Base Period and all Option Periods. G&A cost are applied to arrive at the burdened trip cost.

- **12.0_Summary of Rates** – This tab provides the various rates used throughout our pricing. Specifically this tab provides the indirect rates and escalation rates for each period. Please note that all escalation rates are 0% (i.e., escalation factor of 1.0) as the period of performance is entirely contained within calendar year 2013.

- **12.1_Likelihood of Call Volume** – This tab provides the likelihood of performance table from Section L of the solicitation.

- **12.2_Labor Hours** – This tab provides productive and total hours assumptions by entity and labor category type.

SOURCE SELECTION INFORMATION–See FAR 2.101 and 3.104

- **12.3_Labor Rates** – This tab provides the labor category, entity, productive hours, total hours, base salary, ~~overtime pay,~~ and adjusted salary for all positions. For each labor category, an hourly rate is calculated based on the adjusted salary over the ~~total~~ productive hours. For all labor categories, G&A and profit are applied to arrive at the hourly price.
- **12.4_NMC Session Volumes** – This tab provides the estimated Non-Medical Counseling sessions for CLIN X003 Non-Medical Counseling. As required by Section J-1, a total session volume of 100,000 is assumed for Base Period and a session volume of 60,000 for each Option Period.
- **12.5_NMC Session Rates** – This tab provides the subcontractor non-medical counseling sessions rates for Base Period and all Option Periods. G&A and profit are applied to arrive at the fully burdened rate. Additionally on this tab are the Affiliate Provider Network Non-Medical Counseling Session rates for Base Period and all Option Periods. G&A and profit is applied to arrive at the fully burdened rate.
- **12.6_NMC Nat'l Allocation** – This tab calculates the per session allocation for National Provider Network and Claims process for Base Period and all Option Periods. G&A and profit are applied to arrive at the fully burdened rate. The fully burdened per session allocation is applied to all Situational Counseling In Person sessions.

Intermediate CLIN Worksheets

- **CLIN X001 1-800 Call Center Operations**: The worksheet(s) that directly support CLIN X001 include:
  - o **1.1_CLINX001A_Tier1** – As required by Section J-1, ValueOptions has not calculated a price associated with a call volume of 0 to 20,000 calls per month
  - o **1.2_CLINX001B_Tier2** – As required by Section J-1, ValueOptions has not calculated a price associated with a call volume of 20,001 to 30,000 calls per month
  - o **1.3_CLINX001C_Tier3** – As required by Section J-1, ValueOptions has not calculated a price associated with a call volume of 30,001 to 40,000 calls per month
  - o **1.4_CLINX001D_Tier4** – This worksheets calculates the number of FTEs and total price associated with a call volume of 40,001 to 50,000 calls per month
  - o **1.5_CLINX001E_Tier5** – This worksheet calculates the number of FTEs and total price associated with a call volume of 50,001 to 60,000 calls per month
  - o **1.6_CLINX001F_Tier6** – This worksheet calculates the number of FTEs and total price associated with a call volume of 60,001 to 70,000 calls per month
  - o **1.7_CLINX001G_Tier7** – This worksheet calculates the number of FTEs and total price associated with a call volume of 70,001 to 80,000 calls per month
  - o **1.8_CLINX001H_Tier8** – This worksheet calculates the number of FTEs and total price associated with a call volume of 80,001 to 90,000 calls per month
  - o **1.9_CLINX001I_Tier9** – This worksheet calculates the number of FTEs and total price associated with a call volume of 90,001 to 100,000 calls per month

- o **1.10_CLINX001J_Tier10** – This worksheet calculates the number of FTEs and total price associated with a call volume of 100,001 to 110,000 calls per month
  - o **1.11_CLINX001K_Tier11 –** This worksheet calculates the number of FTEs and total price associated with a call volume of 110,001 to 120,000 calls per month
- **CLIN X002 IT Operations Management**: The worksheet(s) that directly support CLIN X002 include:
  - o **2.0_CLINX002_IT** – This worksheet calculates the total price associated with CLINX002. Information Technology Management labor categories, fully burdened labor prices, annual FTEs, and total price are provided for the Base Period and all Option Periods.
- **CLIN X003 Non-Medical Counseling:** The worksheet(s) that directly support CLIN X003 include:
  - o **3.0_CLINX003_NonMedical** – This worksheet calculates the non-medical counseling session rates for Situational Counseling In Person, ~~Situational Counseling Telephonic/Electronic,~~ Financial Counseling In Person, Financial Counseling Telephonic/Electronic, ~~Health & Wellness Coaching Telephonic/Electronic,~~ and Tax Telephonic sessions for Base Period and all Option Periods, as well as the monthly rates for Situational Counseling Telephonic/Electronic and Health & Wellness Coaching Telephonic/Electronic. ~~Note that the~~ For Situational Counseling In Person, Financial Counseling In Peron, Financial Counseling Telephonic/Electronic, and Tax Telephonic sessions, the total cost associated with those session types ~~CLIN X003~~ is calculated on the CLIN Structure (Section J-1) worksheets 'J-1_Base', 'J-1_Option 1', and 'J-1_Option 2', where the total cost is calculated by multiplying the session rate by the workload volumes contained within worksheet "12.4_NMC Session Volumes." For Situational Counseling Telephonic/Electronic and Health & Wellness Coaching Telephonic/Electronic, the total cost associated with those session types is calculated on the CLIN Structure (Section J-1) worksheets 'J-1_Base', 'J-1_Option 1', and 'J-1_Option 2', where the total cost is calculated by multiplying the monthly rate by the number of months within the period.
  - o **3.1_CLINX003_FacetoFace** – This worksheet calculates the Affiliate Provider Network Session Rate and adds to it the National Provider Network and Claims Processing burden to arrive at the Fully Burdened Situational Counseling Telephonic/Electronic Session Rate for the Base Period and all Option Periods. For additional Affiliate Provider Network session rate support, please refer to tab "12.5_NMC Session Rates." For additional National Provider Network and Claims Processing burden support, please refer to tab "12.6_NMC Nat'l Allocation."
  - o **3.2_CLINX003_TelephonicElec** – This worksheet calculates the fully burdened ~~hourly rates for the~~ labor ~~categories~~ cost required to handle Situational Counseling Telephonic/Electronic sessions for Base Period and all Option Periods. To calculate total price per period, fully burdened hourly labor rates are multiplied by the number of annual productive hours by the number of annual FTEs required to perform the given workload, then taking the appropriate proportion of the total price for the given period (i.e., 5/12 for Base or 3/12 for all Option Periods). We then divided the total price by the number of ~~Situational Telephonic/Electronic sessions~~months within the respective period to derive the ValueOptions Fully Burdened Situational Counseling Telephonic/Electronic ~~Session~~

~~Rate~~monthly rate. Please refer to the cost realism narrative to for further detail on all assumptions used to calculate this rate.

- o **3.3_CLINX003_FinancialTax** – This worksheet provides the fully burdened session rates for the Base Period and all Option Periods for Financial Counseling In Person, Financial Counseling Telephonic/Online, and Tax Telephonic sessions provided by our subcontractors. For additional support for these session rates, please refer to tab "12.5_NMC Session Rates."

- o **3.4_CLINX003_H&W** – This worksheet calculates the fully burdened ~~hourly rate~~labor cost for the Health & Wellness Coaching Telephonic/Electronic sessions for Base Period and all Option Periods. To calculate total price per period, ValueOptions multiplied the fully burdened hourly rate by the number of annual productive hours by the number of annual FTEs required to perform the given workload, then taking the appropriate proportion of the total price for the given period (i.e., 5/12 for Base or 3/12 for all Option Periods). We then divided the total price by the number of ~~Health & Wellness sessions~~ months within the respective period to derive the total Health & Wellness Coaching Telephonic/Electronic ~~Session Rate~~monthly rate.

- **CLIN X004A Joint Family Support Assistance Program (JFSAP)**: The worksheet(s) that directly support CLIN X004A include:

  - o **4.1_CLINX004A_JFSAP** – This worksheet calculates the total price associated with CLINX004A. Joint Family Support Assistance Program (JFSAP) labor categories, fully burdened labor prices, FTEs, and total price are provided for the Base Period and all Option Periods.

- **CLIN X004B Spouse Education and Career Opportunities (SECO)**: The worksheet(s) that directly support CLIN X004B include:

  - o **4.2_CLINX004B_SECO** – This worksheet calculates the total price associated with CLINX004B, including steady-state operations labor, transition out dedicated labor, transition out non-dedicated labor, transition out severance and retention incentive payments, transition out ODCs, and transition out travel. As required by Section J-1, costs for CLIN X004B are to be priced for the first three months of Base Period.

  - o **4.2.1_CLINX004B_SECO Labor** – This worksheets calculates the total price associated with CLINX004B labor, including steady-state operations labor, transition out dedicated labor, and transition out non-dedicated labor. Labor categories, fully burdened labor prices, annual FTEs, and total price are provided for the first three months of Base Period.

  - o **4.2.2_CLINX004B_SECO Trans_Sev** – This worksheet calculates the total cost associated with CLINX004B transition out severance and retention incentives for ValueOptions' SECO staff and our subcontractor, Talent Curve's, staff that are retained through the entire 3-month Transition-Out period for SECO. Labor categories, total annual hours (internal figures for subcontracted labor, which will vary from the external figures provided in Schedules 4.2.1, 12.2, and 12.3), annual salaries, number of FTEs, severance assumptions, and retention incentive assumptions are provided. In addition to the estimated tax costs, G&A is applied to arrive at the fully burdened severance cost.

  - o **4.2.3_CLINX004B_SECO Trans_ODC** – This worksheet calculates the total cost associated with CLINX004B transition out ODCs. Other direct costs, vendor/subcontractor name, unit quantity, fully burdened cost, and total cost are provided

for the first three months of Base Period. For additional support for these costs, please refer to worksheets "11.1_Inputs_ODCs" and "11.2_Inputs_Additional Charges."

- o **4.2.4_CLINX004B_SECO Trans_Travel** – This worksheet calculates the total cost associated with CLINX004B transition out travel. Additional support can be found in tab "11.3_Inputs_Travel."

- **CLIN X005 Program Management**: The worksheet(s) that directly support CLIN X005 include:
  - o **5.0_CLINX005_PM** – This worksheet calculates the total cost associated with CLINX005. Program Management labor categories, fully burdened labor prices, annual FTEs, and total price are provided for the Base Period and all Option Periods.

- **CLIN X006 Strategic Outreach -- Labor**: The worksheet(s) that directly support CLIN X006 include:
  - o **6.0_CLINX006_Outreach** - This worksheet calculates the total price associated with CLINX006. Strategic Outreach labor categories, fully burdened labor prices, annual FTEs, and total price are provided for the Base Period and all Option Periods.

- **CLIN X007 Facilities Lease and Operational Costs**: The worksheet(s) that directly support CLIN X007 include:
  - o **7.0_CLINX007_Facilities:** This worksheet calculates the total cost associated with CLINX007. Facilities Lease / Operational Cost, vendor name, unit quantity, fully burdened cost, and total cost are provided for Base Period and all Option Periods. For additional support for these costs, please refer to worksheets "11.1_Inputs_ODCs" and "11.2_Inputs_Additional Charges."

- **CLIN X008 Other Direct Costs (ODC)**: The worksheet(s) that directly support CLIN X008 include:
  - o **8.0_CLINX008_ODCs:** This worksheet calculates the total cost associated with CLINX008. Other direct costs, vendor / subcontractor name, unit quantity, fully burdened cost, and total cost are provided for Base Period and all Option Periods. For additional support for these costs, please refer to worksheets "11.1_Inputs_ODCs" and "11.2_Inputs_Additional Charges."

- **CLIN X009 Travel**: The worksheet(s) that directly support CLIN X009 include:
  - o **9.0_CLINX009_Travel** – The worksheet calculates the total cost associated with CLINX008. Total travel expenses are provided for Base Period and all Option Periods. Additional support for these costs can be found in worksheet "11.3_Inputs_Travel."

- **CLIN X010 Transition Out**: The worksheet(s) that directly support CLIN X010 are as follows:
  - o **10.0_CLINX010_Transition Out (Optional)** – As indicated by Section J-1, CLIN X010 is to be definitized after award.

Attachment J-1, CLIN Structure Worksheets
- **J-1_Base** – Extended Price by CLIN for Base Period
- **J-1_Option 1** – Extended Price by CLIN for Option Period 1
- **J-1_Option 2** – Extended Price by CLIN for Option Period 2

APPENDIX A: LIST OF WORKSHEETS IN D.F.1: PRICING MODEL

Input Worksheets	Intermediate CLIN Worksheets	CLIN Structure Worksheets
11.0_Inputs Staffing	1.1_CLINX001A_Tier1	J-1_Base
11.1_Inputs_ODCs	1.2_CLINX001B_Tier2	J-1_Option 1
11.2_Inputs_Additional Charges	1.3_CLINX001C_Tier3	J-1_Option 2
11.3_Inputs_Travel	1.4_CLINX001D_Tier4	
12.0_Summary of Rates	1.5_CLINX001E_Tier5	
12.1_Likelihood of Call Volume	1.6_CLINX001F_Tier6	
12.2_Labor Hours	1.7_CLINX001G_Tier7	
12.3_Labor Rates	1.8_CLINX001H_Tier8	
12.4_NMC Session Volumes	1.9_CLINX001I_Tier9	
12.5_NMC Session Rates	1.10_CLINX001J_Tier10	
12.6_NMC Nat'l Allocation	1.11_CLINX001K_Tier11	
	2.0_CLINX002_IT	
	3.0_CLINX003_NonMedical	
	3.1_CLINX003_FacetoFace	
	3.2_CLINX003_TelephonicElec	
	3.3_CLINX003_FinancialTax	
	3.4_CLINX003_H&W	
	4.1_CLINX004A_JFSAP	
	4.2_CLINX004B_SECO	
	4.2.1_CLINX004B_SECO Labor	
	4.2.2_CLINX004B_SECO Trans_Sev	
	4.2.3_CLINX004B_SECO Trans ODC	
	4.2.4_CLINX004B_SECO Trans_Trav	
	5.0_CLINX005_PM	
	6.0_CLINX006_Outreach	
	7.0_CLINX007_Facilities	
	8.0_CLINX008_ODCs	
	9.0_CLINX009_Travel	
	10.0_CLINX010_Transition Out	

Lead Schedule
Statement Regarding Final Proposal Revisions (FPR)

<u>**Statement Regarding FPR:**</u>

At the request of the Government, ValueOptions has revised its pricing for Solicitation #D13PS00423. All
changes within D.a.1_Labor Rates have been highlighted in green.

All changes to pricing inputs have been highlighted in green within their respective schedules.

Volume II - Price

D.a.2_Lead

ValueOptions, Inc.

Solicitation # D13PS00423

SOURCE SELECTION INFORMATION -

See FAR 2.101 and 3.104

Lead Schedule

Statement Regarding Final Proposal Revisions (FPR)

<u>**Statement Regarding FPR:**</u>

At the request of the Government, ValueOptions has revised its pricing for Solicitation #D13PS00423. All changes within D.a.2_Productive Hours have been highlighted in green.

All changes to pricing inputs have been highlighted in green within their respective schedules.

Lead Schedule
Statement Regarding Final Proposal Revisions (FPR)

<u>Statement Regarding FPR:</u>

At the request of the Government, ValueOptions has revised its pricing for Solicitation #D13PS00423. All
changes within D.f.1_Pricing Model have been highlighted in green.

All changes to pricing inputs have been highlighted in green within their respective schedules.

Lead Schedule
Military OneSource Indirect Rates
Statement Regarding Final Proposal Revisions (FPR)

<u>**Statement Regarding FPR:**</u>

At the request of the Government, ValueOptions has revised its pricing for Solicitation #D13PS00423. All changes within D.f.2_Summary of Indirect Rates have been highlighted in green.

All changes to pricing inputs have been highlighted in green within their respective schedules.

Lead Schedule
Statement Regarding Final Proposal Revisions (FPR)

<u>**Statement Regarding FPR:**</u>

At the request of the Government, ValueOptions has revised its pricing for Solicitation #D13PS00423. All changes within D.h_Subcontracting Plan Pricing have been highlighted in green.

All changes to pricing inputs have been highlighted in green within their respective schedules.

Lead Schedule
Statement Regarding Final Proposal Revisions (FPR)

<u>**Statement Regarding FPR:**</u>

At the request of the Government, ValueOptions has revised its pricing for Solicitation #D13PS00423. All changes within D.i_CLIN Structure Attachment J-1 have been highlighted in green.

All changes to pricing inputs have been highlighted in green within their respective schedules.

VALUEOPTIONS' MILITARY ONESOURCE (MOS) SUBCONTRACTING PLAN

Name of Contractor: ValueOptions, Inc.
Contractor's Address: 240 Corporate Blvd
                             Norfolk, VA 23502
Solicitation Number: D13PS00423
Item/Service: Military OneSource
Total Amount of Contract (Including options): See Volume II, Tab D Price Tables

INTRODUCTION: ValueOptions is deeply committed to partnering with high-performing small and diverse businesses. We encourage high performing minority-, women-, HUBZone-, 8(a) certified-, SDB-veteran-, service-disabled veteran-owned small businesses as well as AbilityOne and other businesses and organizations to participate in our Supplier Diversity Program. Our Supplier Diversity Program is an integral part of our corporate procurement process. Our website provides for online registration of diversity suppliers and vendors. Additionally all of our vendors and suppliers, including our network providers, must complete a separate registration certifying that small business status. Our small business database is routinely reviewed and updated to ensure that our small business suppliers and vendors certifications are current.

1. **Separate percentage goals for using small business (including ANCs and Indian tribes), veteran-owned small business, service-disabled veteran-owned small business, HUBZone small business, small disadvantaged business (including ANCs and Indian tribes) and women-owned small business concerns as subcontractors;**

The following table lists ValueOptions' small business subcontracting goals for the Military OneSource program. These goals are based on the contract total value.

Business Category	Percentage Goal – (% of Total Contract Value)
Small Business	~~17.6~~18.9%
Veteran-Owned Small Business	4.~~5~~8%
Service-Disabled Veteran-Owned Small Business	~~3.8~~4.1%
HUBZone Small Business	0.05%
Small Disadvantaged Business	1.~~3~~4%
Woman-Owned Small Business	6.~~2~~7%
Ability One	0.~~7~~8%

2. **A statement of the total dollars planned to be subcontracted and a statement of the total dollars planned to be subcontracted to small business (including ANCS and Indian tribes), veteran-owned small business, service-disabled veteran-owned small business, HUBZone small business, small disadvantaged business (including ANCS and Indian tribes) and women-owned small business concerns;**

TOTAL DOLLARS PLANNED TO BE SUBCONTRACTED
Note: Per Section L instructions in paragraph (h) of Tab D: Price Tables, "the price information supporting the Subcontracting Plan shall be submitted within Tab D."

The following table lists the total dollars planned to be subcontracted and the total dollars subcontracted to small business for the Military OneSource program.

A. Estimated value* of planned subcontracting to **small business concerns** is:

Category	VO Planned Dollars	Total Small Business Subcontractor Planned Dollars	Total
Base Period	Tab D - Price Tables	Tab D - Price Tables	Tab D - Price Tables
Option Period - I	Tab D - Price Tables	Tab D - Price Tables	Tab D - Price Tables
Option Period - II	Tab D - Price Tables	Tab D - Price Tables	Tab D - Price Tables

(*this figure includes the amounts in B, C, D, E, F and G below.)

B. Estimated value of planned subcontracting to **small disadvantaged business (SDB) concerns** is:

Category	VO Planned Dollars	Total SDB Subcontractor Planned Dollars	Total
Base Period	Tab D - Price Tables	Tab D - Price Tables	Tab D - Price Tables
Option Period - I	Tab D - Price Tables	Tab D - Price Tables	Tab D - Price Tables
Option Period - II	Tab D - Price Tables	Tab D - Price Tables	Tab D - Price Tables

C. Estimated value of planned subcontracting to **women-owned** small business (WOSB) concerns is:

Category	VO Planned Dollars	WOSB Subcontractor Planned Dollars	Total
Base Period	Tab D - Price Tables	Tab D - Price Tables	Tab D - Price Tables
Option Period - I	Tab D - Price Tables	Tab D - Price Tables	Tab D - Price Tables
Option Period - II	Tab D - Price Tables	Tab D - Price Tables	Tab D - Price Tables

D. Estimated value of planned subcontracting to qualified **HUBZone** small business concerns is:

Category	VO Planned Dollars	HUBZone Subcontractor Planned Dollars	Total
Base Period	Tab D - Price Tables	Tab D - Price Tables	Tab D - Price Tables
Option Period - I	Tab D - Price Tables	Tab D - Price Tables	Tab D - Price Tables
Option Period - II	Tab D - Price Tables	Tab D - Price Tables	Tab D - Price Tables

E. Estimated value of planned subcontracting to qualified **service disabled veteran-owned** small business (SDVOSB) concerns is:

Category	VO Planned Dollars	SDVO Subcontractor Planned Dollars	Total
Base Period	Tab D - Price Tables	Tab D - Price Tables	Tab D - Price Tables
Option Period - I	Tab D - Price Tables	Tab D - Price Tables	Tab D - Price Tables
Option Period - II	Tab D - Price Tables	Tab D - Price Tables	Tab D - Price Tables

F. Estimated value of planned subcontracting to qualified v**eteran-owned** small business (VOSB) concerns is:

Category	VO Planned Dollars	VOSB Subcontractor Planned Dollars	Total
Base Period	Tab D - Price Tables	Tab D - Price Tables	Tab D - Price Tables
Option Period - I	Tab D - Price Tables	Tab D - Price Tables	Tab D - Price Tables
Option Period - II	Tab D - Price Tables	Tab D - Price Tables	Tab D - Price Tables

G. Estimated value of planned subcontracting to qualified **AbilityOne** concerns is:

Category	VO Planned Dollars	AbilityOne Subcontractor Planned Dollars	Total
Base Period	Tab D - Price Tables	Tab D - Price Tables	Tab D - Price Tables
Option Period - I	Tab D - Price Tables	Tab D - Price Tables	Tab D - Price Tables
Option Period - II	Tab D - Price Tables	Tab D - Price Tables	Tab D - Price Tables

3. **Description of the principal types of supplies and services to be subcontracted and an identification of types planned for subcontracting to small business (including ANCS and Indian tribes), veteran-owned small business, service-disabled veteran-owned small business, HUBZone small business, small disadvantaged business (including ANCS and Indian tribes), and women-owned small business concerns;**

PRINCIPAL TYPES OF SUPPLIES AND SERVICES TO BE SUBCONTRACTED
The following table identifies the principal types of supplies and services proposed for subcontracting to both large and small business by category.

Subcontracted Product or Service	Business Size and Small Business Category							
	LB	SB	VOSB	SDVOSB	HUBZone	SDB	WOSB	AbilityOne
Factor 1 Technical and Management Approach Subfactor 1 Call Center / Web Site Operations								
Call Center Staffing, translation services, fulfillment, IT hardware and software	X							
Translation services for legal documents (e.g. leases, marriage licenses, adoptions, utility bills, etc.).	X							
Technical infrastructure support for translation/interpretation capability – telephonic translation services	X							
Web site content, IT hardware and software	X							
General Education/Materials Fulfillment services – printing, warehousing, mailing	X	X						

Subcontracted Product or Service	Business Size and Small Business Category							
	LB	SB	VOSB	SDVOSB	HUBZone	SDB	WOSB	AbilityOne
Factor 1 Technical and Management Approach Subfactor 2 Non-Medical Counseling								
Non-Medical Network Providers	X	X	X	X	X	X	X	
Tax filing support for Participant access to free tax filing services for Federal and multiple state returns as well as telephonic tax consultations	X	X						X
Telephonic tax assistance consultations to assist Participants with their tax filing questions	X	X						X
Face-to-face financial Counseling financial counseling, tax services	X							
Factor 1 Technical and Management Approach Subfactor 3 MOS Mandated Program Support Centers								
Spousal Career and Educational Counseling services		X					X	
Factor 1 Technical and Management Approach Subfactor 4 Program Oversight								
Training support to MOS Staff	X							

4. METHOD USED TO DEVELOP THE SUBCONTRACTING GOALS

In establishing goals for subcontracting with small, small disadvantaged, woman-owned, historically black colleges and minority institutions, HUBZone, veteran-owned, and service-disabled veteran-owned small business concerns, VO first considers customer/agency goals such as DoD's FY 2013 goals for Small Disadvantaged Business (5%), Women-Owned small business (5%), HUBZone small business (3%), and Service-Disabled Veteran-Owned small business (3%). If the customer has not established specific goals, VO uses the goals established by the Supplier Diversity Plan in conjunction with Corporate guidance. Additionally, we take into account guidance outlined in FAR 19.705-4, specifically that subcontracting goals are attainable and that subcontracting opportunities made available are "commensurate with the efficient and economical performance of the contract," and take into consideration the pool of available subcontractors. Also, when customer goals are not defined, at a minimum, VO uses the following methods to develop the subcontracting goals for small business concerns:

- Identifying potential areas to subcontract.
- Performing risk analyses of potential subcontract areas and ensuring that each risk can be eliminated or mitigated to a manageable level.
- Discussions with small business representatives regarding subcontracting goals and current areas of emphasis.

- Reviewing the percentage of subcontracting to small businesses for reasonableness.

5. METHOD TO IDENTIFY POTENTIAL SOURCES FOR SOLICITATION PURPOSES

Potential sources for subcontracting include:

- VO' Procurement Office through internal company source lists
- VO' Web-based Small Business access and certification process
- Partner referrals
- Small Business Administration and other resources obtained from Minority Business Development organizations
- AbilityOne resources
- Trade fairs and other commercial activities promoting small business utilization
- Small business association conferences and networking venues
- Agency small business conferences, such as VA's annual veteran small business conference
- Agency-sponsored small business procurement sessions
- SBA's small business enterprise centers
- Networking with small business advocacy groups
- Other small business networking sessions, such as the Women's Small Business Roundtable

ValueOptions relies on the information contained in the (SAM) database as a basis for establishing small business source lists, as well as self-certifications provided by vendors and providers. The information is used in determining a business concern's size and ownership characteristics. As a part of ValueOptions' Small Business Plan initiatives, we have developed, update and maintain a small business Access database. This database tracks annual vendor self-certifications (based on their response to ValueOption's self-certification requirements and template) and generates reports that tell us when new certifications will be needed so that they can be distributed on a timely basis. Our database captures service-specific vendor capabilities so that when a requirement exists we can immediately seek cost/price quotes from pre-qualified small business vendors. Vendor information is entered into the database proactively as connections are made through source lists, trade shows, partner referrals, agency-sponsored small business procurement meetings, agency-sponsored small business conferences, and other small business association venues.

6. STATEMENT CONCERNING INDIRECT COSTS

~~ValueOptions' indirect and overhead costs have not been included in the (dollar and percentage) subcontracting goals stated above.~~ Overhead costs, such as rent, utilities, telecommunications, postage, and insurances, have not been included in the goals specified above. The allocation of common corporate overhead activities is not included. Costs such as salaries, taxes, benefits, state license fees, credentialing databank fees, national accreditation fees, travel costs, medical records costs, and professional licenses fees have not been included in the goals specified. In addition, costs associated with the Capital Lease of IT hardware, software, and equipment maintenance have not been included in the goals. Indirect costs such as supplies and other miscellaneous items are included in SDB goals. These costs will be tracked based on invoices. The allocation base we are currently using to allocate our G&A indirects that meet the above criteria are total salaries per contract. (TRICARE, MOS, USCG, GSA)

7. PROGRAM ADMINISTRATOR

Name: Renee Kennish
Position: Military OneSource Program Director
Company: ValueOptions, Inc.
Address: 240 Corporate Blvd
City/State/Zip: Norfolk, VA 23502
Telephone #:   (757) 893-8645
FAX #:   (757) 892-5729

Duties: The Program Director shall have general overall responsibility for ValueOptions' Subcontracting Program, i.e., developing, preparing and executing individual subcontracting plans and monitoring performance relative to this particular plan. These duties include, but are not limited to, the following activities:

a**.** Developing and promoting policy statements that demonstrate support for awarding contracts and subcontracts to AbilityOne, small, small disadvantaged, woman-owned, historically black colleges and minority institutions, HUBZone, veteran-owned, and service-disabled veteran-owned small business concerns.
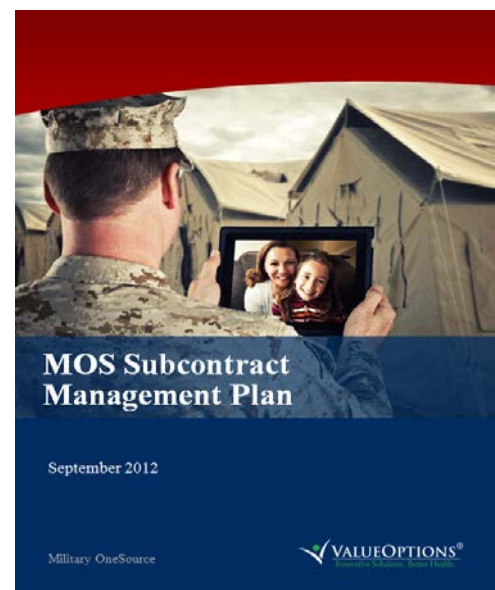
b. Developing and maintaining bidders' lists of AbilityOne, small, small disadvantaged, woman-owned, historically black colleges and minority institutions, HUBZone, veteran-owned, and service-disabled veteran-owned small business concerns from all possible sources.

c. Ensuring periodic rotation of potential subcontractors on bidders' lists.

d. Assuring that AbilityOne, small, small disadvantaged, woman-owned, historically black colleges and minority institutions, HUBZone, veteran-owned, and service-disabled veteran-owned small business concerns are included on the bidders' list for every subcontract solicitation for products and services they are capable of providing.

e. Ensuring that subcontract procurement "packages" are designed to permit the maximum possible participation of small, small disadvantaged, woman-owned, historically black colleges and minority institutions, HUBZone, veteran-owned, and service-disabled veteran-owned small business concerns.

f. Reviewing subcontract solicitations to remove statements, clauses, etc., which might tend to restrict or prohibit AbilityOne, small, small disadvantaged, woman-owned, historically black colleges and minority institutions, HUBZone, veteran-owned, and service-disabled veteran-owned small business concerns.

g. Overseeing the establishment and maintenance of contract and subcontract award records.

h. Attending or arranging for the attendance of staff at Business Opportunity Workshops, Minority Business Enterprise Seminars, Trade Fairs, and other venues promoting small business utilization.

i. Directly or indirectly counseling small, small disadvantaged, woman-owned, historically black colleges and minority institutions, HUBZone, veteran-owned, and service-disabled veteran-owned small business concerns on subcontracting opportunities and how to prepare bids to the company.

j. Providing notice to subcontractors concerning penalties for misrepresentations of business status as small, small disadvantaged, woman-owned, historically black colleges and minority

institutions, HUBZone, veteran-owned, and service-disabled veteran-owned small business for the purpose of obtaining a subcontract that is to be included as part or all of a goal contained in ValueOptions' subcontracting plan.

k. Monitoring the company's performance and making any adjustments necessary to achieve the subcontract plan goals.

l. Preparing and submitting timely reports.

m. Coordinating ValueOptions' activities during compliance reviews by Federal agencies.

8. EQUITABLE OPPORTUNITY

ValueOptions will make every effort to ensure that AbilityOne, small, small disadvantaged, woman-owned, historically black colleges and minority institutions, HUBZone, veteran-owned, and service-disabled veteran-owned small business concerns will have an equitable opportunity to compete for subcontracts. These efforts will include, but not limited to, the following activities:

a. Outreach efforts to obtain sources:
   1. ValueOptions.com Small Business vendor registration portal.
   2. Contacting minority and small business trade associations.
   3. Contacting business development organizations.
   4. Identifiying sources from the CCR Dynamic Small Business Search.
   5. Attending AbilityOne, small, small disadvantaged, woman-owned, historically black colleges and minority institutions, HUBZone, veteran-owned, and service-disabled veteran-owned small business procurement conferences and trade fairs.

b. Internal efforts to guide and encourage purchasing personnel:
   1. Presenting workshops, seminars and training programs.
   2. Establishing, maintaining and using AbilityOne, small, small disadvantaged, woman-owned, historically black colleges and minority institutions, HUBZone, veteran-owned, and service-disabled veteran-owned small business source lists, guides and other data for soliciting subcontracts.
   3. Monitoring activities to evaluate compliance with the subcontracting plan.

9. FLOW DOWN CLAUSE

ValueOptions agrees to include FAR 52.219-8, "Utilization of Small Business Concerns", in all subcontracts that offer further subcontracting opportunities and will further require all subcontractors, except small business concerns who receive subcontracts excess of $650,000 ($1,500,000 for construction), to adopt a plan that complies with the requirements of the clause at FAR 52.219-9, "Small Business Subcontracting Plan" to assure that all minimum requirements of an acceptable subcontracting plan have been satisfied.

ValueOptions agrees that the clause will be included and that the plans will be reviewed against the minimum requirements for such plans. The acceptability of percentage goals for AbilityOne, small, small disadvantaged, woman-owned, historically black colleges and minority institutions, HUBZone, veteran-owned, and service-disabled veteran-owned small business must be determined on a case-by-case basis depending on the supplies and services involved, the availability of potential small, small

disadvantaged, woman-owned, historically black colleges and minority institutions, HUBZone, veteran-owned, and service-disabled veteran-owned small business subcontractors and prior experience. Once approved and implemented, the plans will be monitored through the submission of periodic reports, and/or visits to the affected subcontractor's facilities to review applicable records and evaluate the subcontractor's performance.

10. REPORTING AND COOPERATION

ValueOptions gives assurance of:

(i) Cooperation in any studies or surveys as may be required.

(ii) Submission of periodic reports which show compliance with the subcontracting plan.

(iii) Submit the Individual Subcontract Report (ISR), and the Summary Subcontract Report (SSR) using the Electronic Subcontracting Reporting System (eSRS) (http://www.esrs.gov), following the instructions in the eSRS. The reports shall provide information on subcontract awards to small business concerns. The report shall be submitted as required during contract performance. A report will also be submitted for each contract within 30 days of contract completion. Reports will be submitted 30 days after the close of each reporting period, unless otherwise directed by the Contracting Officer.

(iv) Ensure that its subcontractors with subcontracting plans agree to submit the ISR and/or the SSR using the eSRS.

(v) Provide its prime contract number and its DUNS number and the e-mail address of the Government or Contractor official responsible for acknowledging or rejecting the reports, to all first-tier subcontractors with subcontracting plans so they can enter this information into the eSRS when submitting their reports.

(vi) Require that each subcontractor with a subcontracting plan provide the prime contract number and its own DUNS number, and the e-mail address of the Government or Contractor official responsible for acknowledging or rejecting the reports, to its subcontractors with subcontracting plans.

11. DESCRIPTION OF RECORDKEEPING

ValueOptions will maintain at least the following types of records to demonstrate procedures adopted to comply with the requirements and goals in the subcontracting plan. These records will include, but not be limited to:

   a. Small, small disadvantaged, woman-owned, historically black colleges and minority institutions, HUBZone, veteran-owned, and service-disabled veteran-owned small business source lists, guides and other data identifying such vendors.
   b. Organizations contacted for small, small disadvantaged, woman-owned, historically black colleges and minority institutions, HUBZone, veteran-owned, and service-disabled veteran-owned small business sources.

   c. On a contract-by contract basis, records on all subcontract solicitations over $150,000 indicating on each solicitation (1) small businesses were solicited, and if not, why not; (2) veteran-owned small businesses were solicited, and if not, why not; (3) service- disabled veteran-owned small businesses were solicited, and if not, why not; (4) HUBZone small business were solicited, and if not, why not; (5) whether small disadvantaged business concerns were solicited and if not, why not; (6) and women-owned small business contractors were solicited, and if not, why not; and (7) if small business concerns were solicited, but not receive the award, the reason(s) for non-award.

   d. Memberships in professional organizations committed to implementing federal acquisition policies. ValueOptions Federal Division associates are members of the National Contract Management Association (NCMA).

   e. Records to support internal activities to:

- Guide and encourage purchasing personnel to identify and use small, small disadvantaged, woman-owned, historically black colleges and minority institutions, HUBZone, veteran-owned, and service-disabled veteran-owned small business (i.e., workshops, seminars, training programs, and incentive awards).
- Monitor activities to evaluate compliance.

   f. On a contract-by-contract basis, records to support subcontract award data including the name, address and business size of each subcontractor.

12. PROCESSES FOR MANAGING, COMMUNICATING, AND PERFORMANCE MONITORING OF PROPOSED SUBCONTRACTORS

VO Subcontractor Management Processes. As the incumbent for the MOS contract, our subcontractor management processes are based on lessons learned from the current contract as well as other prime contract efforts of similar size, scope and complexity. These lessons clearly indicate that the highest performance and lowest risk is achieved when the contracting team is seamlessly integrated. To this end we have put in place both contractual controls (e.g., teaming and subcontracting arrangements) that exhibit common characteristics to ensure sound management execution, and procedural controls (e.g., weekly meetings, common training methodologies) that are also critical to successful execution.

Central to our management processes is a system of regularly scheduled and ad hoc communication efforts that contribute to team integration and overall team performance by reducing the risk of misunderstandings which could potentially impact contract performance.
First and foremost, our teaming and subcontracting arrangements help mitigate subcontractor performance risk by providing documents that contain unambiguous language that supports positive subcontract controls, eliminates misunderstandings, and contributes to overall contract performance. All subcontracts include clearly defined Statement of Work (SOW) language that delineates specific deliverables, explains what work is to be done, and how their efforts contribute to a fully integrated project plan or project team (IPP/IPT). Each individual

MOS Subcontract
Management Plan

September 2012

Military OneSource

Solicitation # D13PS00423   9
SOURCE SELECTION INFORMATION – See FAR 2.101 and 3.104
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subcontractor—whether they provide direct or indirect contract support—understands how their efforts fit seamlessly into overall program execution in support of military members and the Military Community and Family Policy (MC&FP) mission. This shared understanding of the program expectations of both the MC&FP program and of VO is a critical element of the management plan. Our Subcontractor Management Processes are essential to establishing and maintaining the open and honest communications required for developing long-term working relationships with our teaming partners. The focus of our subcontract relationships is maintaining a clear and unwavering focus on contract compliance, performance improvement and customer satisfaction. The following products and procedures assist in program management:

- **MOS Subcontract Management Plan (SCMP) –** The MOS SCMP reduces subcontractor risk by outlining and implementing clear procedural controls. The Subcontract Manager, along with the MOS Program Director and the Federal Contract Administrator, are responsible for administering the SCMP. The Subcontract Manager (SCM) develops and updates the subcontract-specific SCMP and meets with each subcontract-designated representative to develop a shared understanding of the program's intent, and both the subcontractor's and ValueOptions' expectations. Regular updates make the SCMP a "living document." Immediately upon notification of contract award and prior to the kick-off meeting, the management team will review the SCMP and update it if necessary.
- **Team VO Contract Kick-off Meeting** – Prior to issuing subcontract agreements and within two days of contract award notification, we will schedule a kick-off meeting with the senior leadership of all Team VO member companies. During this meeting we re-confirm the Team's understanding of the technical and contractual requirements and performance standards, the deliverables, the chain of command within the team, and internal communication operating procedures.
- **Subcontract Management Plan** – Each Team member will be presented with an updated copy of the SCMP, which contains content such as:
  - SOW/PWS, and terms and conditions applicable to all Team members (applicable flow down clauses)
  - Specific Team member roles and responsibilities
  - Quality Assurance program expectations
  - Quality Assurance program parameters and definitions (subcontract-specific)
  - Team member work allocation
  - Reporting expectations
  - Monthly performance expectations and metrics
  - Weekly meeting agenda outline
  - Problem identification, escalation procedures and resolution process
  - Customer communication and relationship management (roles and responsibilities)
  - MOS organizational chart
  - Training requirements and VO expectations, with templates for monthly reporting
  - VO established workflow requirements

Meetings/Communication – After subcontract issuance, our SCM, Ms. Leah Dempsey, will review the SCMP with senior leadership of each subcontractor, particularly as it relates to processes that support proactive communication, subcontract performance reviews (including cost and schedule), and challenges and opportunities for performance improvement. Our communication plan includes the following:

SOURCE SELECTION INFORMATION – See FAR 2.101 and 3.104
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- **Weekly meetings** – Items reviewed include opportunities for performance improvement, customer feedback, adverse incident reviews, and staff training requirements or recommendations.
- **Monthly Performance Requirement Reviews** – The SCM completes a monthly audit of each MOS Subcontract. Once completed, the SCM meets with the subcontractor to review their monthly performance and identify any need(s) for performance improvement. These audits include agreed-upon Quality Assurance goals, applicable performance requirements from the PWS, customer satisfaction targets, and any concerns related to customer satisfaction, call center metrics or related requirements.
- **Communication** –
  - **Refresher Training** – For those subcontractors who provide a direct service to members, counseling, referrals, or research, we offer a continuous cycle of training. This includes: Common Values in Customer Services; program updates; MOS advanced program awareness – what programs can provide, and updated information on our scope of services.
- **Monthly Review of Customer Satisfaction** – The SCM meets with the subcontract representative monthly to review current Customer Satisfaction results for their area that relate to performance goals and requirements. Any unmet goals or trends are identified, and plans are put into place to mitigate areas of concern.
- **Communication on any Customer Complaint or Service Recovery** – The SCM meets with a subcontractor if any customer complaint or need for service recovery is identified. Identification can either be by the subcontractor in their regular audits or by the regular customer surveys provided to 100% of those appropriate for surveys.
- **Annual Partnership Summit** – VO hosts the annual MOS Partnership Summit and invites representatives from all of our subcontracts. The one-day Summit's purpose is to share information and improve performance across MOS services. While emergent topics will be included each year, topics typically covered include: Risk Mitigation across the Contract; Best Practices in Training; Partner Presentations; Review of Federal Contract Compliance; Review of Current Reporting; Quality Improvement and Auditing; Review of User Satisfaction; Review of Service Breakdown Process; and Identification of Strengths, Weaknesses, Opportunities and Threats.
- **Annual Site Audit** – The SCM and Contract Administrator perform an Annual Site Audit using a checklist to ensure that performance requirements have been achieved, compliance requirements have been addressed, and that all reporting and training requirements have been met. *Note:* This Checklist will be completed by the SCM and Federal Contract Administrator at an annual review with the Subcontract point of contact.

Area	Met/Not Met	Review Notes
Invoice Audit		
Review of Call Audits		
Compliance with FAR clauses		
Complaints and Resolution Review		
Monthly Reporting Compliance		
Annual Report Compliance		
Training Compliance Review		
Orientation Training		
Duty to Warn Process		
Military Culture Training		

Any Additional Training Need Identified?		
Disaster Preparedness Plan for MOS Program		
Staff Licensing and Certification Compliance		
Contractor Code of Ethics available to MOS staff		

Figure 2 – Annual Site Audit Checklist

Our subcontract agreements will contain provisions that cover the following areas:

- **Program Interfaces –** Our subcontracting agreements describe both the formal and informal interfaces allowable between VO, our customer and between our teammates.
- **Authorizations to Proceed –** Our agreements state that prior to any start work efforts, subcontractors must be granted an authorization to proceed. All authorizations must be transmitted in writing and may **not** be authorized verbally.
- **Quality Standards and Ethics Practices –** As a pre-condition of subcontracting, our teammates must agree to comply with all of VO' Quality Standards and Ethics, and other contract-specific, contractually mandated terms and conditions (e.g. Confidentiality, Non-Disclosure and Organization Conflict of Interest (OCI). Subcontractors must agree to and support independent quality inspections, and acknowledge that failure to meet one or more of the success criteria (quality standards) may result in a breach of agreement and subcontract termination.
- **Identification of Program Constraints/Restraints –** Our agreements identify other program constraints/restraints, such as customer contact, hiring of other teammate employees, as well as employee experience, education and performance requirements that must be attained and maintained as a provision of the subcontract agreements. Violating these requirements may result in termination of the subcontract agreement. As a subcontracting provision, all companies understand that Ms. Kennish, after appropriate customer consultation, is empowered with the authority to remove any employee who, after performance counseling, fails to meet designated performance/deliverable standards.
- **Contract-Related Training Requirements –** Contract-related training requirements include, as a minimum, all PWS training requirements, as well as security and ethics training requirements. Compliance with these training requirements is regularly reported and validated through Annual Site Audits, as indicated above. Failure to maintain contract-related training requirements may result in termination of the subcontract.

Subcontractor Performance Monitoring and Risk Mitigation. We utilize multiple means to mitigate potential subcontractor-related performance risk and improve overall MOS performance. Subcontractor-related performance risk affects all aspects of program cost, control and schedule. VO's subcontracting management processes/approach (as identified above) contributes significantly to identifying and mitigating subcontractor performance risk by reducing the misunderstandings that could impact contract performance. Our approach to performance monitoring includes the following:

- **Monthly Audits of Subcontracts** (outlined above)

- **Annual Site Audits of Subcontracts** (outlined above)

- **Monthly Training Report –** Completed by subcontractor to ensure that required training (e.g., orientation training, including military culture awareness) is conducted prior to employee start dates, and that refresher training is up-to-date and meets emergent concerns and needs.

- **Subcontractor Cost-Related Risk –** Subcontractor cost control is maintained through both positive and procedural means. Performance risk due to subcontractor cost is mitigated by maintaining the close working relationships and communication we have established with our team. Subcontractor coordination and integration is facilitated by weekly internal meetings conducted by our program support team. Program performance is a key agenda item during these meetings. The Program Director, Ms. Kennish, is made aware of any outcomes resulting from these meetings, particularly any items that relate to subcontractor performance and require immediate action with the designated corporate subcontractor leads. As the incumbent team for MOS, our Team's experience and past performance contributes to mitigating subcontractor risk based on cost/price. Our in-depth understanding of MC&FP's execution requirements means we feel confident in issuing fixed fee price subcontracts/pricing following contract award. The benefit to MC&FP is minimal risk due to subcontractor costs, and better overall cost control.

- **Subcontractor Performance/Schedule Control Risk –** Our Program Director maintains performance and schedule controls. Project actions, milestones and timelines are established for all project activities, thus enabling program personnel and designated MC&FP personnel to monitor project action/milestone accomplishments. This provides an effective and transparent means to measure action/milestone accomplishments against actual costs that are derived through our cost accounting system. Program personnel are able to track subcontractor performance and project-related deliverables, as well as those for the entire team. Additionally, this assists the MC&FP and program/project managers by providing an accurate/transparent means to measure action/ milestone accomplishments against actual program costs, and accurately project estimates to completion. Subcontractor performance is also monitored and reported by a series of agreed-upon quality/performance measures aimed at creating program efficiencies that contribute to process improvements relating to program cost, performance and schedule. Another way of mitigating subcontractor performance/schedule risk is by constant planned and ad-hoc communication, coaching, and training. In addition to the aforementioned controls, we conduct formal and informal meetings between Ms. Kennish and our subcontracting corporate leads, and between Ms. Dempsey and designated subcontractor lead personnel. Among the many issues discussed, the primary focus of these meetings is to proactively identify potential requirements, issues and risks related to subcontractor and overall team performance.

13. PRIOR BUSINESS RELATIONSHIPS AND MERIT OF PROPOSED SUBCONTRACTORS

Our teaming approach/strategy focuses on identifying and vetting highly qualified large and small partners who have the necessary capabilities, experience and past performance to support current and future MC&FP challenges. Additionally, we continuously seek out small businesses that are financially stable, possess key/innovative capabilities, and have mature business processes. As a minimum, teammates are considered based on their ability to meet the following criteria:
- Experience and past performance supporting communication efforts with military members, as well as knowledge of key MC&FP internal and external stakeholder audiences
- Demonstrated expertise and past performance in key PWS areas
- The ability to bring additional capability depth and innovation in key MC&FP PWS support areas
- Competitive corporate pricing models
- Current industry best practice capabilities in their primary support areas

As you will see in our Past Performance citations, our Team meets and exceeds our above selection criteria. Above all, we looked for industry partners with a reputation for working harmoniously on a contract team. All teaming agreements for major/critical subcontractors have been completed and are provided directly following this Subcontracting Plan. The prior business relationship and overall merit of our teaming partners is addressed below:

Company Name	H&R Block
Type of Supply/Service:	Personal tax preparation services
Size Classification:	Large Business
Prior Business Relationship	Yes: Current Team Member on MOS Contract, one of the world's largest and most reliable tax service providers.
Teaming Agreement Attached	Yes
Rationale for Selection	H & R Block (HRB), one of the world's largest tax services providers, has worked successfully with VO over the past year to provide an online tax software application designed specifically for the MOS website. HRB provides training for MOS tax advisors and technical support for their web application in order to make the tax service support seamless and the application user friendly to MOS members. Additionally, HRB has worked with the client to provide data, in addition to reporting requirements, to highlight historical usage as well as daily usage information when needed. HRB currently provides these services for the MOS program and will continue in the same role as a subcontractor to VO should we be awarded the contract.

Company Name	Comprehensive Language Center, Inc. (CLC)
Type of Supply/Service:	Document Translations Services
Size Classification:	Large Business
Prior Business Relationship	Yes: Current team member on VO MOS Contract. Highly skilled and timely document translation with strong translation quality control processes.
Teaming Agreement Attached	Yes
Rationale for Selection	VO partners with CLC to provide document translation services for MOS. CLC has more than 20 years' experience providing high-quality document and transcript translation services, interpretation, and website conversion. The executive staff of CLC has over 55 years of combined experience providing linguistic support services to various government agencies and is well versed in the translation of legal, historical and military documents. All of the linguists have at least five years of experience as professional translators, interpreters or editors with many possessing over 20 years of experience. All staff assigned to the MOS program shall be US citizens.

Company Name	WorkPlace Options (WPO)
Type of Supply/Service:	Non-Medical EAP and Work/Life Services
Size Classification:	Large Business
Prior Business Relationship	Yes: Current team member on VO MOS Contract. Long-term successful partnership VO for Over 5 Years.
Teaming Agreement Attached	Yes
Rationale for Selection	WPO is a current team member on VO MOS Contract. WPO has a strong record of performance on the MOS Contract. VO has successfully partnered with WPO for over 5 years to provide integrated EAP and Work/Life services. WPO

	provides a wide range of Work/Life services, both nationally and internationally, that includes providing information, issue-specific research, and referrals for a myriad of issues such as child care, adoption services, children with special needs, college preparation, testing and tutoring, budgeting, debt management, retirement adjustment, successful aging, elder care, consumer education, pet care, and concierge services, to name but a few.

Company Name	RR Donnelley
Type of Supply/Service:	Fulfillment services
Size Classification:	Large Business
Prior Business Relationship	Yes: Current Team Member on VO MOS Contract – Strong Fulfillment Services Performance Record on MOS Contract. Multiple distribution centers.
Teaming Agreement Attached	Yes
Rationale for Selection	Current Team Member on VO MOS Contract – Strong Fulfillment Services Performance Record on MOS Contract. Multiple distribution centers. For the past year, VO has partnered with RR Donnelley, a worldwide leader in distribution and integrated communication, for over a year to provide fulfillment services for the MOS program. Under fulfillment RR Donnelley provides services to include receipt of MOS materials from other parties, storage, inventory, shipping and invoicing. Collaborative work includes on-line catalog enhancements that allow the client to capture PWS deliverables. Reporting enhancements include capturing and reporting information on a wide variety of areas to include specific Service Provider information to type of event and military branch and component. Client requested customized catalogs were created to allow selected end users to process materials.

Company Name	Able Forces
Type of Supply/Service:	Telephonic Tax Advisor Staffing Support, Administrator Support and Wounded Warrior Staffing Support
Size Classification:	AbilityOne
Prior Business Relationship	Yes: Current team member on VO MOS Contract.
Teaming Agreement Attached	Yes
Rationale for Selection	Federal Contracting experience and current team member on VO MOS contract. Specializes in Wounded Warrior and Wounded Warrior Care Giver Support and Employment. One of three AbilityOne Partner companies with Pre-existing and Successful Wounded Warrior Employment Assistance Support. Current Workforce is Comprised Primarily of Wounded Warriors, Wounded Warrior Care-Givers and Disabled Veterans. Additionally, Able Forces operates the National Veterans Center in Washington DC under a grant from the HSC Foundation. They maintain close ties with both Georgetown and George Washington University's and a number of the Professors that are involved in veteran programs, curriculum, etc. Potential synergy between Able Forces and VO in the hiring of Wounded Warriors and Veterans on the MOS Program and VO recently Awarded Wounded Warrior Project, an 18-month initial pilot which includes EAP non-medical counseling. Supports VO technical approach for steady increases in hiring of Veterans and Wounded Warriors.

Company Name	MVLE
Type of Supply/Service:	Telephonic Tax Advisor Staffing Support, Administrator Support and Wounded Warrior Staffing Support

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SOURCE SELECTION INFORMATION – See FAR 2.101 and 3.104
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Size Classification:	AbilityOne
Prior Business Relationship	No: Recommended by NISH based on both performance and having a pre-existing Wounded Warrior Program
Teaming Agreement Attached	Yes
Rationale for Selection	Federal Contracting experience. Specializes in Wounded Warrior and Veteran employment. One of three AbilityOne Partner companies with pre-existing and successful Wounded Warrior employment assistance support. Current workforce has significant Wounded Warrior participation through DoD Mentor Protégé Program with Northup Grumman, a unique program as MVLE was the first and only AbilityOne provider ever admitted into this prestigious small business program (potential model for future relationship with VO). Potential synergy between MVLE and VO in the hiring of Wounded Warriors and Veterans on the MOS Program and VO recently Awarded Wounded Warrior Project, an 18-month initial pilot which includes EAP non-medical counseling. Supports VO technical approach for steady increases in hiring of Veterans and Wounded Warriors.

Company Name	Linden Resources
Type of Supply/Service:	Telephonic Tax Advisor Staffing Support, Administrator Support and Wounded Warrior Staffing Support
Size Classification:	AbilityOne
Prior Business Relationship	No: Recommended by NISH based on both performance and having a pre-existing Wounded Warrior Program
Teaming Agreement Attached	Yes
Rationale for Selection	Federal Contracting experience and one of three AbilityOne Partner companies with pre-existing and successful Wounded Warrior and/or Veteran employment assistance support. Linden's "VetsReady2Work" program provides employment assistance and placement services for current and prior veterans and Wounded Warriors. Potential synergy between Linden Resources and VO in the hiring of Wounded Warriors and Veterans on the MOS Program and VO recently Awarded Wounded Warrior Project - an 18-month initial pilot which includes EAP non-medical counseling. Supports VO technical approach for steady increases in hiring of Veterans and Wounded Warriors.

SOURCE SELECTION INFORMATION – See FAR 2.101 and 3.104
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VALUEOPTIONS' RESPONSE TO DOI VOLUME II QUESTIONS PROVIDED ON JANUARY 15, 2013

#	CLIN	DoI Questions	ValueOptions' Response
1	Labor Rates/ Labor Categories	Though ValueOptions states that no labor escalation was applied to management and staff as the POP falls entirely within the 2013 calendar year, there was a significant increase in fully burdened rates compared to those proposed for the current contract ending February 10, 2013. Rates for similar labor categories increased, on average, by 34% when fully burdened, and decreased by an average of 8% when comparing base rates. This far exceeds the 2 to 3% escalation that is typically proposed from one year to the next. Moreover, the adjustments were not uniform; the rates varied from a 21% decrease to a 110% increase for burdened rates and from a 42.1% decrease to a 72.6% increase in base rates. Another very noticeable difference is the inclusion of the 35.26% fringe rate proposed for this contract, whereas fringe was not included in ValueOptions' proposal for the current contract. With regard to the omission of fringe in the previous proposal, the government surmised that fringe was probably included in the overhead rate; however, if that were the case, the Government would have expected overhead rates submitted with the recent proposal to decrease – instead they increased. Overall the number of labor categories decreased by 10 (25 labor categories were removed compared to the previous contract and 15 new labor categories were added).	ValueOptions is committed to providing the Government with fair and reasonable cost proposal estimates rooted in our historical experience. As such, we developed our proposed fully-burdened labor rates based on our actual costs to meet the requirements of the contract. However, we understand the Government's concerns and have subsequently, made several changes to our proposed fully-burdened labor rates to be more aligned with the fully-burdened labor rates for the current bridge contract: • Reclassified the fringe costs back to our overhead rate • Readjusted our methodology for developing Hourly Base Labor Rates to be based on Productive Hours (i.e., 1800) instead of Total Hours (i.e., 2080) Furthermore, understanding the c current Federal budget pressures, ValueOptions' leadership team applied a management reduction to our overhead rate for this Military OneSource contract in order to align our overall weighted average labor rate escalation across all labor categories to be consistent with the Government's expectation of a 3% escalation. Please note that the 34% increase notated by the Government reflects a straight average of all labor rates variance. This methodology overstates the increase in ValueOptions actual labor rates. ValueOptions believes that a weighted average labor rate calculation is more appropriate to capture the true incremental labor cost associated for the contract. Please reference D.a.1 for our actual calculations.

SOURCE SELECTION INFORMATION–See FAR 2.101 and 3.104

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#	CLIN	DoI Questions	ValueOptions' Response
		Please explain the rationale, along with justification, for such a significant increase in fully burdened labor rates, to include an explanation for the apparent decrease in pay to staff (i.e., lowering of base rates).	
2	CLIN X001 - Call Center Operations:	The staffing proposed for Tier 6, which is the average Tier experienced in the last year, represents a reduction of 38.3 FTEs from their actual usage in that same time frame. ValueOptions added the personnel from the Wounded Warrior Resource Center, in the current contract, to CLIN X001, representing an addition 7 FTEs. Overall, this is a decrease of 15.3% in staffing, but only a savings of 0.85% in price. This disparity is driven by the significant increase in labor rates.	ValueOptions has adjusted our overall weighted average labor rate escalation across all labor categories to align with the Government's expectation of a 3% escalation. Please see our response to Question #1 for further detail on the revised labor rate escalation.
3	CLIN X001 - Call Center Operations:	Over the course of discussions between the government and ValueOptions beginning with initial discussions leading up to the award of the current contract, it was stated by ValueOptions that the Call Center performance metric of 98% of calls to be answered within 20 seconds was a significant cost driver as staffing would need to be at a sufficient level in order to achieve this requirement. This requirement was relaxed to an industry standard of 90% of calls answered within 20 seconds in the RFP for the 2nd bridge contract. In doing so, the government anticipated that relaxing this requirement would result in lower staffing levels proposed by ValueOptions - which was the case; however, this did not translate into cost savings, as any savings realized by a reduction in staff was offset by the significant increase in labor rates.	The relaxation of the Call Center performance metric from 98% of calls to be answered within 20 seconds to 90% of calls answered within 20 seconds did result in lower staffing levels proposed, which consequently translates into cost savings.

ValueOptions has adjusted our overall weighted average labor rate escalation across all labor categories to align with the Government's expectation of a 3% escalation. Please see our response to Question #1 for further detail on the revised labor rate escalation. |
| 4 | CLIN X002 – IT Ops Mgmt | The total staffing proposed for CLIN X002 represents a decrease of 3 FTEs; however, due to the increase in labor rates, the price has increased by over 37%. | ValueOptions has adjusted our overall weighted average labor rate escalation across all labor categories to align with the Government's expectation of a 3% escalation. Please see our response to Question #1 for further detail on the revised labor rate escalation. |
| 5 | CLIN X003 – | There is a duplication in cost elements between | That is no duplication in cost elements between Situational In Person |

SOURCE SELECTION INFORMATION–See FAR 2.101 and 3.104
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#	CLIN	DoI Questions	ValueOptions' Response
	Non-Medical Counseling:	Situational In Person Counseling and the Program Management CLIN. The Provider Relations labor categories that exist in CLIN 0005 were moved from CLIN 0003 in the 1st Contract and now exists in both locations (in CLIN 0003 as a burdening factor). This drives the Situational Counseling session rates up $13.49 per session. The Situational Telephonic Counseling and Health & Wellness Counseling are built upon the premise of five FTEs' salaries being divided among the expected volume. This would result in either the Government overpaying or VO losing money depending on actual usage. The Government recommends changing these types and methods of counseling to a monthly fixed price to capture the FTEs' salaries rather than generating per session rates.	Counseling and the Program Management CLIN. The Provider Relations labor categories proposed in CLIN X005 serve distinct and separate functions from the National Provider Relations and Claims Processing Allocation applied in CLIN X003. To clarify, the Provider Relations labor categories that exist in CLIN X005 are one-hundred percent dedicated to the Military OneSource contract and perform the following functions: Outreach specific to MOS, provider customer services specific to MOS, and provider recruitment above-and-beyond the ValueOptions EAP Provider Network (i.e., provider recruitment targeted as specific geographies in order to meet the requirements of the Military OneSource contract). Distinctly, the National Provider Network and Claims Processing burden applied to CLIN X003 is an allocation from ValueOptions' Corporate National Provider Network and Claims Processing functions, which include claims processing, provider network systems costs, and general maintenance of the ValueOptions' provider network. As recommend by the Government, ValueOptions has modified the pricing for the Situational Telephonic Counseling and Health & Wellness Counseling to reflect a monthly fixed price to capture the FTEs' fully burdened cost rather than generating a per session rate.
6	CLIN X004A – JFSAP	Though staffing levels are similar between the two contracts, the driver for the higher price in the 2nd bridge is a 28% increase in the consultants' labor rate.	ValueOptions has adjusted our overall weighted average labor rate escalation across all labor categories to align with the Government's expectation of a 3% escalation. Please see our response to Question #1 for further detail on the revised labor rate escalation.
7	CLIN X004B – SECO	With regard to the retention/severance incentive payments, the Government wants written confirmation that SECO staff that leave before the end of the three month period of performance will not receive this bonus. Billing Specialists' burdened rates were among the highest increases from contract to contract at 72.1%.	ValueOptions confirms that SECO staff that leave before the end of the three month period of performance for CLIN X004B Spouse Education and Career Opportunities (SECO) will not receive a severance/retention incentive payment. Since CLIN X004B is a Time & Material CLIN, ValueOptions will only invoice the Government for severance/ retention incentive payments for staff that are retained

#	CLIN	DoI Questions	ValueOptions' Response
			for the entire three-month period of performance for SECO. ValueOptions has adjusted our overall weighted average labor rate escalation across all labor categories to align with the Government's expectation of a 3% escalation. Please see our response to Question #1 for further detail on the revised labor rate escalation.
8	CLIN X005 - Program Management	There is a reduction in FTEs of 6.1 (15.4%) from the previous contract, however the price was only reduced 2.75%. As stated above, there is a duplication in charges for the provider relations team; the Government recommends reflecting them in CLIN X005.	ValueOptions has adjusted our overall weighted average labor rate escalation across all labor categories to align with the Government's expectation of a 3% escalation. Please see our response to Question #1 for further detail on the revised labor rate escalation. The Provider Relations labor categories proposed in CLIN X005 serve distinct and separate functions from the National Provider Relations and Claims Processing Allocation applied in CLIN X003. Please see our response to Question #5 for further detail.
9	CLIN X006 - Strategic Outreach (Labor)	The burdened rate for the Content Specialist increased 57.7% between contracts.	ValueOptions has adjusted our overall weighted average labor rate escalation across all labor categories to align with the Government's expectation of a 3% escalation. Please see our response to Question #1 for further detail on the revised labor rate escalation.
10	CLIN X007 – Facilities Lease and Operational Costs	There is an increase in the facilities lease expense of 37.1% (from $186,073/ month to $255,023/month) without explanation. There is an increase in other operational costs of 15.7% ($491,918 before applying G&A and fee, versus $568,918 in the new proposal).	ValueOptions' actual expense to operate the Arlington and Chesapeake facilities have increased due to higher than expected operational costs to maintain a 24/7/365 call center environment. This includes a direct monthly increase of $19,852 for Arlington air conditioning and $12,758 for Chesapeake's lease and operational costs. All other cost variances are attributable to changes in overhead and G&A costs applied to the direct monthly increases stated above. The other operational expenses included in CLIN X007 equate to $489,518 in costs (prior to G&A and fee application) which is in line with current operations cost of $491,918.

ValueOptions, Inc. Proposal Dated 7 January 2013

Solicitation No. D13PS00423

Items/Questions for Discussion

Factor 1 – Subfactor 1 – Call Center/Website Operations

Vol 1 – Page 13 & 34 (Call Center): Specific to child care referrals, the Offeror states (on p. 13), "We receive regular feeds from state child care agencies with information on licensed providers. Local oversight bureaus provide the same information for adult care providers. Our Researchers confirm that the adult/child care providers are still complying with local regulations prior to providing a referral to a Service Member or family members. They also contact the Local Ombudsman Program to confirm this information." On page 34, the Offeror provides a summary of the MOS EAP Website (Achieve Solutions). Under the Childhood Services heading, the Offeror lists the following bullets: Adoption Assisted Search, Adoption Provider Locator, **Child Care Provider Locator, Child Care Assisted search**, Find Tutoring Help." Child Care location is not a function of MOS any longer; rather, Child Care Aware is where the MOS consultants are to refer participants specific to child care support.

The language in our proposal has been modified to reflect referral to Child Care Aware of America. Please see modifications on pages 13, 34, 35, 103 and 109 of our revised proposal.

Questions:

1.   Vol 1 – Page 10 (General education materials): The charts on pages 10 and 11 still have Military Homefront listed as a resource location for Military Benefits and Transition to Civilian Life. Military Homefront information has been consolidated into Military OneSource and is no longer a standalone website. Please clarify.

References to Military Homefront have been removed, please see pages 10 and 11 of our revised proposal.

2.   Vol 1 – Page 12-13 and 14 (Call Center & Work/Life Database): The discussion specific to the Work/Life database does not include information specific to how the providers and programs that are in the database are vetted. Please clarify.

We have modified our response to include discussion of the vetting of providers and programs, please see pages 12 and 13 of our revised proposal.

3.   Vol 1 – Page 21 (Call Center): The "Research staff members who each possess at a minimum a bachelor's degree or commensurate experience (e.g., a military spouse with good research skills)." Please clarify how commensurate experience is measured and how it is determined that commensurate experience is equivalent to a bachelor's degree.

We have modified our response to elaborate on commensurate experience, please see page 21 of our revised proposal.

4.   Vol 1 – Page 31 & 111 (Call Center): On page 31, the Offeror reports, Language interpretation/translation services are provided for more than 150 languages;" however, on page 111, the Offeror states, "Our language translation services support more than 170 languages." Please clarify the correct number (150 or 170).

5.	Vol 1 – Page 57 (Call Center & Disaster Recovery): On page 57, the Offeror states, "As with the Avaya call center installations, each of the SIS architectures has duplicated components for the third level of redundancy. This allows each of the central architectures to remain operational and capable of managing 100 percent of all calls if one of the servers fails. In the event that both the Reston 8710s are unreachable, ValueOptions has duplicated the central Avaya architecture in a data center in **Arlington, Texas."** However, on page 58 (and various other places throughout the volume in which Disaster Recovery is discussed), **Richardson, Texas** is named as the location for the "stand-by, secondary Data Center." As per googlemaps.com, Richardson and Arlington Texas are 32.8 miles apart. Are both of these locations utilized for secondary, stand-by centers or is there an error in the bridge proposal volume? Please clarify.

The reference to Arlington, Texas was an error. Please see page 57 of our revised proposal for corrected language.

6.	Scope/eligibility (PWS page 2): On page 2 of the PWS, there is a reference to Section J, Attachment 2. Offeror's proposal did not include this reference; thus, some of the authorized categories of individuals supported were not included in the Offeror's proposal.

Our response has been modified to ensure all eligible categories of individuals are acknowledged. Please see page 7 of our revised proposal.

7.	Referrals (PWS page 3): The Offeror did not include Child Care Aware referrals.

We have modified our response to include reference to referring to Child Care Aware of America for child care referrals. Please see pages 9 and 11 of our revised proposal.

8.	Referrals (PWS page 3): Offeror's discussion on substance abuse referrals should reflect the process they utilize to facilitate these referrals and ensure that the Offeror is clear that they do not engage in substance abuse assessments.

We have modified our response to clarify the referral process for substance abuse and the fact that Military OneSource Consultants do not engage in substance abuse assessments. Please see pages 10, 11 and 75 of our revised proposal.

Factor 1 – Subfactor II – Non-Medical Counseling

Questions:

1.	MOS participants are referred to as participants. It is unclear why the Offeror refers to them as "patient" on page 78. Please clarify.

Reference to "patient" has been removed, please see pages 75 and 78 of our revised proposal.

2.	Page 18 (PWS): Life Coaching is listed in the PWS and the Offeror also included this category. For clarification purposes, health coaching should be restricted to fitness and exercise, diet and eating, health and goal setting, outreach and engagement, to exclude Life Coaching, as this overlaps into the non-medical counseling area.

We have modified our language to reflect only the services covered under the Military OneSource contract. Please see pages 91, 92, 93 and 95 of our revised proposal.

3.   Page 18 (PWS): Non-monetary incentives. Both the PWS and the Offeror listed Non-monetary incentives; however, the Offeror needs to be clear about what these non-monetary incentives are and how they are utilized.

We have eliminated the reference to non-monetary incentives. Please see page 95 of our revised proposal.

Factor 1 – Subfactor III – MOS Mandated Program Support Centers

SECO transition:

Vol 1 – Page 28 and SECO transition plan (SECO transition): The Offeror does not provide clear information specific to the SECO transition in either the summary on page 28 or the transition plan. Rather, the summary on page 28 is a general summary of information already provided in the PWS and the transition plan is not clear about the timeline for the transition (e.g., are all of the tasks concurrent, will some tasks begin later than others, what are the risks of task completion and how will the lack of completion and/or missed goals impact other tasks). Lastly, it is unclear why the Offeror states (on page 3 of the SECO transition plan), "Zeiders will need to pick up new school orientation immediately. Currently facilitated via Live Meeting or Go To Meeting accounts," Duration=60 days.

Questions:

1)   Attachment 1: SECO transition out plan has a comprehensive list of tasks and durations. With no task dependencies identified or the projected time line (except for the 90 day overall requirement), it is difficult to understand how the transition will actually be performed. Provide any additional information that would clarify the SECO transition process sequentially. Identify any overlapping tasks or dependencies on events or work outside VO's control.

We have provided an updated transition plan as Attachment 1. Revised SECO Transition Out Plan and Attachment 1. Revised SECO Transition Out Plan GANTT Chart to address and meet the requirements delineated above.

2)   The SharePoint application to manage the JFSAP staff generates information on many key points in the business process. This information would be very useful to the program managers to evaluate the success of the program. This information should be made available to the government.

The SharePoint site will be made available to the Government at any time. This is reflected in the language in our revised proposal on page 105.

3)   Vol 1 – Page 103 (JFSAP): The Offeror states, "there will be a JFSAP consultant assigned to all reserve headquarters, if and when approved by the service component. At the time of contract award, approval currently exists for JFSAP Consultants at Army and Air Force Reserve headquarters." The government must approve any expansion requests and this is not mentioned in this statement.

We have modified our response to acknowledge the Government needs to approve of any expansion, please see page 103 of our revised proposal.

4)   Vol 1 – Page 104-105 (JFSAP): The Offeror states, "We will use our SharePoint system for oversight and integration of resources. SharePoint will allow best products and practices to be recorded and shared throughout the JFSAP team and call center. The system will also allow for information to be exported and tailored for the purpose of sharing resources with other providers and programs in each state…" Please provide information specific to the vetting process and whether the government has vetted any of the resources discussed.

We have modified our response to include discussion of the vetting process and also confirmation of the Government's approval of the current resource list. Please see pages 104-105 of our revised proposal.

Factor 1 - Subfactor IV – Program Oversight

Questions:

Attachment 1: MOS transition out plan has a comprehensive list of tasks and durations. With no task dependencies identified or the projected time line (except for the 90 day overall requirement), it is difficult to understand how the transition will actually be performed. Provide any additional information that would clarify the MOS transition process sequentially. Identify any overlapping tasks or dependencies events or work outside VO's control.

We have elaborated upon our Military OneSource transition out plan and have included the revised version as Attachment 1. Revised Military OneSource Transition Out Plan. Please also see page 127 of our revised proposal for updated language.

VOLUME I

Cover and Title Page

Cross Reference Matrix

Note – ValueOptions has structured Volume I to correspond to the requirements of RFP SECTION C. We cross reference our response to the requirements of RFP Section L and M.

PWS 1.0 SCOPE
PWS 1.1 INTRODUCTION

ValueOptions, Inc. (ValueOptions), the nation's largest independent behavioral health and wellness company, is privileged to submit our response to Solicitation # D13PS00423-A2 for the Military OneSource program. We provide innovative, cost-effective services to more than 32 million members across the country to include the provision of innovative customized Employee Assistance Program (EAP) services to more than 14 million members. Our approach to the Military OneSource program is based on our experience providing EAP/call center support to our diverse membership through our technology-enabled EAP Work/Life (EAP W/L) call center operations. Additionally, we support more than three million beneficiaries through our subcontract with Humana Military in the Managed Care Support contract for TRICARE South Region. Our guiding corporate principle, *"to proactively manage wellness by improving behavior and health through effective and cost-efficient solutions"* has shaped our Military OneSource approach.

The ValueOptions Approach. Our approach is based on lessons learned from more than 30 years of experience in providing EAP W/L call center services, currently through 39 ValueOptions locations throughout the country. ValueOptions customers have been the recipient of the Employee Assistance Society of North America (EASNA)'s Corporate Award for outstanding program design and execution for six of the last seven years. These customers have been recognized because their EAP has reflected the industry's leading programs based upon the level of member engagement and unique program attributes. ValueOptions has developed the same type of cutting edge program that continually evolves to meet the unique needs of our military members and their families. We possess a unique understanding of the Military OneSource client base and military culture derived from not only our Military OneSource experience, but also our experience with the TRICARE program and other initiatives to support military families. The ValueOptions Team approach addresses:

- *Virtual real-time integration of all critical Military OneSource activities and subcontractor activities.* Successful execution of a program as broad and complex as Military OneSource requires the ability to integrate all program activities in near real-time, and to rapidly identify trends and emerging issues at the aggregate level over time. This is the capability that ValueOptions and its major subcontractors have brought to Military OneSource. We have used our proven, secure CONNECTS system to support the Military OneSource program. Our permission-based, password-protected CONNECTS system supports the continuous access to real-time program data 24 hours a day, seven days a week. Our program supports the Military OneSource client base through multiple modalities including: Internet, telephone (via the current 800 number and collect calls), e-mail, postal, and direct face-to-face consultation. Our CONNECTS system provides decision quality data which enables us to proactively alert the Government of positive indicators (opportunities to reinforce) and negative indicators (emerging issues) on a real time basis. Additionally, our system provides precise metrics in the form of Measures of Performance (MOP) and Measures of Effectiveness (MOE), which allow the Government to clearly qualify the services and quantify their Return on Investment (ROI).
- *Access to Service is ValueOptions' Specialty.* With the implementation of each new contract, ValueOptions has met or exceeded every call center performance standard. Our transition plans are

based on ValueOptions' broad experience in conducting major call center/EAP transitions/implementations. ValueOptions has successfully transitioned hundreds of EAP and call center clients and consistently meets and exceeds all implementation and transition timelines. Of note is our 55 day implementation of the Military OneSource program in 2011, ensuring an uninterrupted flow of services to the Military OneSource client base, and facilitating an orderly and rapid transition from the previous contractor. Additionally, our unmatched and innovative EAP services provide access to just-in-time specialty services and solutions, which have supported our clients through natural or man-made disasters such as the disasters experienced in 2011 and 2012—including Superstorm Sandy—the catastrophic flooding in Haiti, 9/11, Hurricanes Katrina and Gustav, and the shootings at Virginia Tech.

- *ValueOptions is the only premier health and wellness company in the nation that has successfully implemented an electronic, enterprise-wide, collaborative and behavioral health record environment.* For more than 30 years, ValueOptions has been an industry leader in revolutionizing the collection, integration, management, and usage of critical data used to comprise a comprehensive electronic behavioral health record. Our efforts include developing and supporting integrated eHealth platforms consisting of EAP, behavioral, pharmacy, Disease Management and medical informatics. We have assisted clients in Arkansas, Arizona, California, Connecticut, Colorado, Florida, Illinois, Kansas, Massachusetts, New Jersey, Pennsylvania, Tennessee and Texas to customize their electronic behavioral health record systems, as well as develop data collection tools and data management strategies to meet their and their user community requirements. For example, our technology supports collaborative care coordination for our state partners and enables ValueOptions, our clients, and providers to work together to coordinate and improve member services.

- *Our Knowledge Connect (KM) system supports sharing of research/critical information at the aggregate level across all program elements and appropriate users.* Through our systems, the Government will have access to relevant information that will enable successful management of the program.

- *The ValueOptions Talent Management Team Integrated/Collaborative Recruiting and Retention Model Approach --* We use a single, integrated Talent Management Team model to meet Military OneSource recruiting and retention requirements. This approach leverages our expertise, experience and resources in support of a dedicated Military OneSource human resource team. We have integrated our teammates into a single team. Daily coordination occurs in support of Military OneSource training/career development, organizational development and specialized military/wounded warrior/military spouse recruitment.

  - *Recruitment --* The ValueOptions talent management team coordinates and manages all staff recruitment activities. The development of applicant pools for all positions is supported by our applicant database, teammates and recruitment advertising on sites such as HirePatriots.com, Military.com, 4starjobs.com, HireHeroesUSA.org, milspouse.org. Job Fairs targeted to the military community, the use of One-Stop Career Centers, and national and local Veteran's Affairs organizations builds our employer profile and enriches our applicant pools. We have ongoing recruitment processes that allow us to quickly fill positions when attrition occurs. Our priority goal is the identification and recruitment of military, wounded warrior and military spouses.

  - *Retention --* Our commitment is to develop employees who strive to do their best for the members that we serve and to have a committed relationship with ValueOptions. We are dedicated to retaining and developing top performing employees who effectively serve our

clients, their members and support program goals. We provide creative incentives to meet the needs of our evolving workforce such as employee and supervisor training programs, employee incentive programs, competitive pay and benefit programs, and career path development. Our employees are encouraged to grow within the company not only through tuition and licensure reimbursement programs, but through internal opportunities to be promoted or fulfill a new role (25 percent of our open positions were filled with internal applicants in 2012).

We regularly measure the engagement, commitment, and satisfaction of our employees through formal and informal data. The most recent survey feedback indicated a strong commitment to the work the company does every day. We place significant importance on employee feedback; to further increase their satisfaction. Our strong and vibrant employee referral program (just over 21 percent of our hired job seekers were referred candidates in 2012) demonstrates the belief by our employees that ValueOptions is a great place to work. The chart below reflects the unique features of the ValueOptions Team and the commensurate benefits they provide for Military OneSource:

Unique Features of the ValueOptions Team	Benefits to Military One Source
Proven and fully integrated technology platforms and industry best practices	Seamless compatibility, reliability, and scalability on Day 1 of contract award
Extensive transition experience	Continuity of operations and uninterrupted flow of service and support throughout transition and contract performance
Integrated and specialized military/wounded warrior/ spouse recruiting capability	Significantly reduced time-to-fill vacancies with highly qualified applicants
Unique understanding of Military OneSource client-base through our Military OneSource experience and TRICARE South Region Support	Enhanced program effectiveness on Day 1 and proven staff and provider training and educational support
Targeted solutions and EAP programs for audience (18-35) research focused, approach to Military OneSource program support e.g., social networking/ interactive, technology, Web, wellness, research	Expanded target audience reach and increased utilization and improved access to EAP service resources
Rapid and experienced response to natural and unnatural crises	Unmatched and innovative Crisis Response Services experience (2011 natural disasters in the U.S., Japan earthquake, Haiti earthquake, 9/11, VA Tech) supporting just-in-time services and solutions

PWS 1.1.1 BACKGROUND

ValueOptions, through our Military OneSource contract and our TRICARE support efforts, has witnessed the impact and strain that the global war on terror and repeated deployments of troops to Iraq, Afghanistan, Kuwait, Africa, and other locations have placed on military personnel and their families. Our Military OneSource approach is consistent with our TRICARE lessons learned, our corporate history as a behavioral health and wellness company, and our corporate guiding principle *"to proactively manage wellness by improving behavior and health through effective and cost-efficient solutions."* Our approach eases the numerous stressors that have placed increased pressure on marriages and new demands on single parenting, spousal employment, and fluctuating family income. Our technology infrastructure and systems support agile/proactive program utilization data capture, reporting and analysis so that we can identify and respond to members' current needs. What this means for Military OneSource is near-real time/proactive identification of emerging issues as they relate to the evolving needs of Service Members and their families and timely availability of critical Military OneSource services through the most effective and efficient means of delivery. We are dedicated to improving the quality of life for Service Members and their families, and will continue to provide information and

support services under this contract that are fully integrated with resources available throughout the military community, so that that our Service Members remain mission deployable.

Our program design focuses on the need to engage "power users" (typically 18-35 years old). As such, we focus on "best practice" technology delivery applications and stay focused on emerging trends in technology and how they can best be implemented in support of the above referenced primary target audience. Our Technology Innovation Team provides new innovations and delivery systems as they become available.

VALUEOPTIONS TEAM

ValueOptions has extensive support from a rich array of our corporate resources, and an absolute commitment from its corporate leadership. We have a fully established, dedicated program management team who already ensures the delivery of consistent, high-quality services to Military OneSource participants. Drawing on years of experience serving the military community, our team has built a solid relationship with the Government's Program Office that promotes frequent communication and swift resolution of issues as they arise. Each of these key personnel has direct experience serving federal programs, including Military OneSource, the Military Family Life Consultant (MFLC) program, and TRICARE.

Program Director – Renee Owens Kennish

Ms. Kennish is responsible for the management and executive oversight of the entire Military OneSource program. She speaks on behalf of ValueOptions with the DoD and related Government entities. With more than 35 years of professional experience, her background includes work as the Vice President, Military OneSource, for Ceridian Corporation, where she was responsible for executive oversight, quality, and productivity for all aspects of the program, such as establishing what was then called the Military Severely Injured Center in Arlington, Virginia. Ms. Kennish reports directly to Ms. Kerry Mooney, President of ValueOptions' Federal Division.

Deputy Program Director – Lucy Buckner

Ms. Buckner provides day-to-day oversight of operations for ValueOptions Military OneSource team, and assists the Program Director in managing the contract. Besides serving as the Program Director's backup, she manages the training team, oversees the quality team, and provides service center leadership. Ms. Buckner has more than 20 years' experience in behavioral health care, including 15 years as ValueOptions Service Center Vice President and Executive Director for the TRICARE South and TRICARE Region 3 and 4 Behavioral Health Programs. There she was responsible for managing all aspects of the program, which encompassed 10 states and more than 2.9 million lives.

Director of Call Center Operations – Laura DeVault

Ms. DeVault has been instrumental in leading the Military OneSource program implementation, including all aspects of setting up the two call centers. She directs the development and implementation of call center functions, including staffing, recruitment management, workflow and process development, customer service protocols, and technology requirements. Ms. DeVault has been with ValueOptions since 1998, and has served in a number of capacities, including Vice President and Chief Operating Officer (COO) of the Commercial Division, where she worked with call center vice presidents to identify and develop best practices that could be integrated across call centers to ensure operational efficiencies.

Director of Non-Medical Counseling – Jim Keener

Mr. Keener is responsible for overseeing all non-medical counseling, financial counseling, and health and wellness coaching programs for Military OneSource. With more than 30 years of experience in clinical social work, his past roles include counselor for the MFLC program, where he provided short-term, solution-focused support to military Service Members and their families. He then became Director of Field Operations for the program, with responsibility for worldwide delivery of non-medical counseling services to all branches of the military and overseeing more than 500 professional counselors.

Director of Quality Control – Vince Connery

Mr. Connery ensures that all metrics, reports, and data are gathered for the Military OneSource quality assurance program, and that the program is managed and reported within contract standards. He is also responsible for developing and managing the quality assurance plan, and ensuring compliance with credentialing and training of all personnel. Mr. Connery's many years of behavioral health management expertise previously included tenure as a Service Center Vice President for ValueOptions, overseeing a 24-hour call center operation and quality assurance of clinical care management, telephonic referral, and appointment assistance.

Director, Specialty Programs – Rachel Kaufmann

Ms. Kaufmann is responsible for the overall management and operations of the Wounded Warrior, Spouse Education and Joint Family Support programs and supervises Consultants and other direct report staff within the call center to the contractual requirements of these specialty programs. Prior to joining the Military OneSource team, Ms. Kaufmann worked with ValueOptions, Health & Performance Solutions division for seven years; consulting clients on a variety of EAP-related issues.

Director of Information Technology Communication Resources – Angelo Edge

Mr. Edge is responsible for all IT and communication resources deployed in support of the Military OneSource program. This includes direction of all IT operations to meet program requirements, as well as support and maintenance of existing applications, and development of new technical solutions. He has more than 20 years of progressive leadership expertise in information technology, and has provided strategic support for major federal, commercial, and public sector contracts.

Information Security Manager – Izhar Mujaddidi

Mr. Mujaddidi is responsible for the implementation, management, security, and availability of all ValueOptions computer systems for Military OneSource. He is responsible for Information Assurance (IA) related training, operational procedures, documentation, and business processes required for official accreditation through full compliance with the DoD Information Assurance Certification and Accreditation Process (DIACAP). With nearly 20 years' experience, his past roles include information security and leadership positions with Walter Reed Army Medical Center and various federal government and DoD contractors before joining ValueOptions.

Financial Manager – Tina Sarris

Ms. Sarris is responsible for managing the financial activities related to the contract, including preparation of the monthly disbursement report. As ValueOptions' Vice President of Finance, she oversees all aspects of finance for our Federal Division, including all accounting staff. She is responsible for stand-alone external financial statement audits, DCAA audits, IRS audits, and assists with consolidated corporate financial statement audits.

Contract Administrator – John Sparks

Mr. Sparks has full administrative responsibility for the Military OneSource contract and all subcontracts. He serves as a business advisor and compliance monitor of contract and subcontracting agreements. He has more than eight years of experience as a Health Systems Specialist with the Department of Defense with Prime Contractor oversight of Provider Networks and Behavioral Health for the TRICARE West Region contract. He was a member of the Source Selection Evaluation Board for the latest iteration of TRICARE contracts (T-3).

Subcontractor Manager – Leah Dempsey

Ms. Dempsey is responsible for all subcontracted work performed for Military OneSource. She establishes standards of service and measures performance of service by subcontractors. Ms. Dempsey also coordinates performance improvement initiatives between subcontractors' and's operational staffs. She has 20 years' experience as an organizational development consultant, having designed and implemented strategic planning processes for more than 120 organizations including Commander Navy Installations Command (CNIC) Fleet and Family Support Program (CNIC's largest regional fleet and family readiness program), and Zeiders Enterprises Global Contract Team.

Our ValueOptions Teammates. Based on our experience and our review of the Military OneSource RFP, we will continue to use additional team members to supplement our efforts in meeting the requirements of the Military OneSource contract and the ongoing needs of Service Members and their families. Our team member vetting and selection process was based on the following criteria:

- In-depth and current understanding of the Military OneSource client base as it relates to Military OneSource requirements
- Proven past performance of innovation and flexibility/agility in their respective fields indicating their ability to meet the emerging needs of the Military OneSource client base
- Long-term and successful collaboration with ValueOptions
- A clear corporate history of commitment to the Military OneSource program and the Military Mission

MAJOR SUBCONTRACTORS

We will continue to use the following major subcontractors under the bridge contract:

WorkPlace Options (WPO)

WPO provides comprehensive Work/Life services, including tax filing consultations, for the Military OneSource program. ValueOptions' 10-year partnership with WPO enables us to offer high quality services to military members in international locations. WPO is the first Work/Life services provider to receive company-wide ISO 9001 certification (the gold standard for quality assurance) assuring the Military OneSource program the highest confidence in the services WPO provides. WPO's certification covers the full scope of the company's services, including work/life, financial counseling, and clinical back-up services, both direct to businesses and via EAP partners.

Comprehensive Language Center (CLC)

ValueOptions partners with CLC to provide document translation services for Military OneSource. CLC has more than 20 years' experience providing high-quality document and transcript translation services, interpretation, and website conversion. Its executive staff has more than 55 years' combined experience providing linguistic support services to various government agencies, and is well versed in the

translation of legal, historical, and military documents. All of its linguists have at least five years of experience as professional translators, interpreters, or editors, and many possess more than 20 years of experience.

RR Donnelley

For the past year, ValueOptions has partnered with RR Donnelley, a worldwide leader in distribution and integrated communication, to provide fulfillment services for the Military OneSource program. RR Donnelley provides services to include receipt of Military OneSource materials from other parties, storage, inventory, and shipping.

H&R Block (HRB)

HRB, one of the world's largest tax services providers, has worked successfully with ValueOptions over the past year to provide an online tax software application designed specifically for the Military OneSource website. HRB provides training for Military OneSource tax advisors and technical support for their Web application in order to make the tax service support seamless and the application user-friendly to Military OneSource participants.

Talent Curve

A Woman-Owned Small Business (WOSB), Talent Curve has a rich history of providing education and career counseling services and is certified by the Woman's Business Enterprise National Council. In 2006, Talent Curve won HR Executive Magazine's top product of the year for their college admissions website for parents and students called "Education in Motion."

PWS 1.2 SCOPE OF WORK

As the current vendor, ValueOptions has experience in providing all of the services required by the Military OneSource RFP both in the CONUS and OCONUS, and assures the Government of our ability to meet requirements of providing unlimited access to stateside and international information, referral, and counseling services to both Service Members and their families.

ValueOptions recognizes the following individuals are eligible to be Military OneSource clients:

- Active duty Members of the military services (Army, Navy, Marine Corps, and Air Force) and their legal dependents
- Members of the Army Guard, Air Guard, the Army, Navy, Marine Corp and Air Force Reserves, and their legal dependents
- Members of the US Coast Guard on active duty, and their legal dependents, mobilized under the authority of the DoD
- DoD civilians staffing military support programs as identified by DoD, to include Chaplains, Family Support Services staff, medical personnel and DoD Education Activity staff
- Members of the DoD Expeditionary Workforce, when deployed, and their legal dependents
- Other members as designated by the DoD Military Community & Family Policy Military OneSource Eligibility Matrix.

PWS 1.2.1 MILITARY ONESOURCE CLIENT ELIGIBILITY

The ValueOptions Team will continue to support all of the Military OneSource Service Members and DoD civilians as indicated. ValueOptions will ensure all callers receive support and are routed to appropriate internal and external resources as indicated by the eligibility matrix.

PWS 1.2.2 MILITARY ONESOURCE PROGRAM

The ValueOptions Team has combined experience to provide call center operations support and website interface development/operations in support of Military OneSource Service Members and their families. Our experience and demonstrated performance for Military OneSource, on our subcontract with Humana Military in the TRICARE South Region contract, and numerous other efforts to support commercial employers with military employee populations uniquely qualify the ValueOptions Team to provide expert information, referral, and educational/consultation services and to recruit, train, and retain a staff of master's level consultants and counselors in support of call center requirements. These services will continue to cover the full range of quality of life programs and services in both the military and civilian sectors and our research staff will use both military and community resource databases of referral and information resources. Our content specialists have significant background in developing and designing useful and focused educational/informational materials. Our networks of face-to-face non-medical counselors, both for short-term problem resolution and financial counseling, are the best in the industry. All services under this contract will be provided both in the CONUS and OCONUS, with the exception of face-to-face non-medical counseling which will only be available within the CONUS. Within 90 days following contract award, we will transition the SECO program to the new SECO provider. Using the same skillset that enabled us to implement SECO in 55 days, we will collaborate closely with the new SECO provider to successfully transition services, ensuring no degradation to quality or disruption of service. Please see **Attachment 1** for a draft copy of our transition out plan for SECO.

1.2.3 MILITARY ONESOURCE PROFESSIONAL AND TECHNICAL EXPERTISE

Military OneSource Consultants will be available 24 hours a day, seven days a week, to provide technical expertise in a variety of disciplines that include expert consultation, education, information, and referral services that will be consultative in nature. We will continue to use our proven procedures and training, currently utilized under our Military OneSource contract, our EAP contracts and in our TRICARE support contract, and experience in serving regulated populations to ensure that the ValueOptions Team fully understands that solicitations of any type are prohibited under this contract.

1.2.4 EAP W/L

ValueOptions has been providing EAP/WL, including seamless integration of non-medical counseling services, for more than 30 years. Our corporate structure is organized to provide all appropriate EAP/WL resources and support for the Military OneSource program. Behavioral health and wellness services (and the technology systems and processes that support these efforts), including EAP/WL programs, are the sole mission of the ValueOptions Team.

1.2.5 U.S. CITIZENSHIP REQUIREMENT
Validation of citizenship status is integral to the ValueOptions Team recruiting efforts. As required, we have and will continue to verify all Military OneSource contractor/subcontractor employees' citizenship.

2.0 APPLICABLE DOCUMENTS AND REFERENCES

The ValueOptions Team recognizes the need to understand and follow the applicable documents and references noted in **Section J, Attachment 11**, mandatory compliance requirements of the PWS.

3.0 MILITARY ONESOURCE PROGRAM REQUIREMENTS

Through the Military OneSource contract, ValueOptions confirms that we will continue to provide 24/7 call center operations that support all service requirements, and that we will provide all services outlined, including:

- recruiting, hiring, training and managing a professional staff
- maximizing the use of military spouses, veterans, and wounded warriors to provide consultation and education on various topics
- establishing business applications and providing interpreter and translations services, back-up operations and surge handling
- developing all technological infrastructures necessary to support call center operations
- refreshing our technology to ensure that state-of-the-art solutions are provided to the Military OneSource contract

Through our innovative EAP experience, we are able to provide the scope and depth of our referral services to Service Members and their families through the Military OneSource contract. These referral services, including the resources available through each, are outlined on the table that follows on the next page. We follow government protocols for specific referrals. For example, we refer individuals with child care needs to Child Care Aware of America.

VALUEOPTIONS®
Innovative Solutions. Better Health.

Info/Referral Services*	Resources
Childhood Services*	**Articles:**1,132 **Webinars/Podcasts:**10 **Brochures:**57 **DVDs:**20 **Tip Sheets:**100 **Online Databases:**4 **Assessments:**10 **Caregiver Worksheets:**13 **Customized Referral Packet**
Counseling for Non-Medical Issues (telephonic, on-line, in-person)	**Articles:**1,254 **Webinars/Podcasts:**28 **Online Databases:**10 **Assessments:**26
Deployment Support (mobilization and reintegration)	**Articles:**39 ***Gov't Provided Guides**: 5 **CD**s: 15 **Kits**: 5 **Articles:**201 **Tip Sheets**: 35 **Reading Lists**:15 **Web Links**: 49 **Worksheets**: 37, **Military Homefront Resources: 7,382**
Disability	**Articles:**91 **Webinars/Podcasts:**4 **Brochures:**1
Domestic Violence Prevention	**Articles:**123 **Webinars/Podcasts:**1 **Online Databases:**1
Elder Care	**Articles:**592 **Webinars/Podcasts:**150 **Brochures:**63 **DVDs:**10 **Tip Sheets:**20 **Online Databases:**20 **Assessments:**12 **Calculators:**25 **Customized Referral Packet**
Education Services for Adults, Children and Youth (DODEA, Tuition Assistance, K-12)	**Articles:**464 **Brochures:**15 **Webinars/Podcasts:**1 **Online Databases:**3 **Assessments:**5
Everyday Issues (e.g., location of a plumber or car repair)	**Articles:**308 **Webinars/Podcasts:**10 **Brochures:**19 **Online Databases:**35 **Assessments:**4 **Calculators:**26
Family Support (Active Duty, Guard and Reserve)	**Articles:**312 **Webinars/Podcasts:**3 **Brochures:**19
Financial Matters (budgeting, financial counseling and planning, on-line state and federal tax filing and assistance, debt reduction, etc.)	**Articles:**215 **Webinars/Podcasts:**13 **Brochures:**28 **Online Databases:** 35 **Assessments:**21 **Calculators:**30
Health and Wellness	**Articles:**3,955 **Webinars/Podcasts:**7 **Brochures:**16 **Tip Sheets:**10 **DVDs:**4 **Online Databases:**6 **Assessments:**54 **Sound Files:**253
Housing (rentals, mortgage, military housing allowances)	**Articles:**164 **Webinars/Podcasts:**39 **Online Databases:**19 **Calculators:** 25
Legal Services Information	**Articles:**200 **Online Databases:**35
Lodging in Military Facilities	***Gov't Provided Articles:**10 **Tip Sheets:**5 **Web Links:**5 **Worksheets:**2, **Military Homefront Resources:**1,439
Military Benefits	***Gov't Provided Articles**: 50 **Web Links**: 20 **Worksheets**: 5, **Military Homefront Resources: 13,187**
Parenting	**Articles:**767 **Webinars/Podcasts:**242 **Brochures:**25 **Online Databases:**12 **DVDs:**15
Pet Care	**Articles:**143 **Webinars/Podcasts:**40 **Online Databases:**2
Recreation (i.e. morale, welfare)	**Articles:**23 **Webinars/Podcasts:**5 **Brochures:**5 **Online Databases:**2 **Assessments:**4
Relocation	**Articles:**63 **Online Databases:**19 **Assessments:**2
Single Troop Services	***Gov't Provided Booklets:**5 **Articles:**35 **Tip Sheets:**5 **Web Links:**2 **Worksheets:**2, **Military Homefront Resources:**521
Shopping and Services (Commissary and Post Exchanges)	**Articles:**361 **Webinars/Podcasts:**3 **Online Databases:**4 **Assessments:**4 **Member Discount Center:**1
Special Needs Services for Children and Adults	**Articles:**69 **Brochures:**15 **Tip Sheets:**10 **Online Databases:**2
Spouse Education and Career Counseling	**Articles:**1,472 ***Gov't Provided Booklets:**5 **Articles**: 35 **Web Links:**40
State Support to the Guard and Reserve	***Gov't Provided Web Links:**5, **Military Homefront Resources:**478
Substance Abuse (addiction, recovery, etc.)**	**Articles:**560 **Online Databases:**3 **Online Self-Assessments:**2
Transition to Civilian Life	**Articles:**5 * **Gov't Provided Articles:**95 **Tip Sheets:**5 **Web Links:**5 **Worksheets:**2, **Military Homefront Resources:**1,993

SOURCE SELECTION INFORMATION–See FAR 2.101 and 3.104

Info/Referral Services*	Resources
TRICARE – Military Health Care Services Referral	**Brochure:**1, **Resource Links:**2 * **Gov't Provided Articles:**20 **Web Links:**10 **Worksheets:**2, ~~**Military Homefront Resources:** 3,152~~
Wounded Warrior Support (Health and Benefits Referral)	**Articles:**4 **Gov't Provided Guides:Articles:** 8 **Reading Lists:**5 **Web Links:** 30 ~~**Military Homefront Resources:**3,682~~
Youth Services	**Articles:**205 **Brochures:**7 **Tip Sheets:**8
Additional troop and family assistance will be provided as identified by the DoD.	

Note: Childhood services and elder care customized referral packets include referrals for services based on the Member's needs and locale, articles, and Web resource links.

*For all child care needs, our triage consultants refer participants to Child Care Aware of America.
**Although Substance Abuse assessment and treatment are not within the scope of the Military OneSource program, it is important that our staff can identify potential substance abuse and make appropriate referrals to TRICARE, private insurance, or other resources.

The ValueOptions quality of life (Work/Life) program provides extensive assistance, information, and support to Members, helping them to achieve a better balance between home and work. Service Members and their families can access local resources such as:

- Prenatal and lactation needs
- Adoption
- Parenting and child development
- Childhood services
- Emergency dependent care
- Education, scholarships, financial aid
- Children and adults with special needs
- Convenience services
- Older adult care, dementia, long distance caregiving

- Health and wellness
- Moving and relocation
- Aging
- Retirement
- End-of-life issues
- Balancing work and family
- Career planning
- Pet care

Additional Work/Life services include the following:

- A comprehensive approach to solving everyday issues. Initial service requests will be processed by Military OneSource Consultants, who are master's-prepared skilled listeners with training in Work/Life services as well as training in behavioral health and military culture. Requests which require intensive specialized assessment and resource development will be transferred to a Work/Life Specialty Consultant.
- Our Work/Life Specialty Consultants hold a minimum of a bachelor's degree with years of experience or a master's degree with years of experience in specific Work/Life related fields, such as early childhood development, education, geriatric services, and special needs populations.
- Consultants discuss Member issues and educate them about their options.
- Consultants record all Member interactions in the database, and forward the information to their Research Specialist when customized research or referrals are needed.
- Educational materials are hand-picked by the Military OneSource Consultant or Work/Life Specialty Consultant, including articles from ValueOptions' comprehensive library, CDs and DVDs.
- Research Specialists provide customized searches and contact providers to confirm availability (vacancy checks) and verify database information (location, licensing).
- The proprietary Work/Life database includes more than one million resources across the country.
- The Research Specialist will review the assembled materials and as needed send the completed packet to the Consultant for review or will contact the Member directly to respond to information and referral requests.
- The Consultants or Researcher will send provider profiles and educational materials via e-mail or regular mail packet, based on the Member's preference.
- At least three follow-up calls: one directly after the referral packets are sent to let the Member know it is on the way, another follow-up call between seven to ten business days after the referral packets are sent to determine satisfaction with referrals and if additional help is needed, and the last follow-up call placed 30 days later to administer the quality assurance survey (to measure overall program satisfaction).

Our national Work/Life database is gathered using information supplied by governmental, not-for-profit, and private sources. All resources are vetted with the proper authorities, including licensure boards and,

state certifications or accreditations. We only include those providers and programs that meet state-specific criteria for legal operation in our database. Legally-operating status includes licensure, registration, certification, accreditation and more. In all cases, regardless of state requirements, the requirements of DoD Instruction 1402.5, Criminal History Background Checks on Individuals in Child Care Services will be met for any provider. We augment information from appropriate agencies with materials in our centralized database. Examples include:

- Administration on Aging
- Afterdeployment.org
- American Camping Association
- American Montessori Association
- American Savings Education Council
- American Veterinary Medical Association
- Assisted Living Federation of America
- Automated Housing Referral Network
- Community Health Accreditation Program
- Consumer Action website
- Federal Resources for Educational Excellence
- Health Care Financing Administration/CMS
- High/Scope Foundation
- International Nanny Association
- Joint Commission Accreditation Health Organization
- Military Money
- Military Moving Station
- Military.com – VA loans, Banking and Saving, Money Management

- Militaryspot.com – Family Support
- National Association for the Education of Young Children
- National Association of Family Child Care
- National Association of Child Care Resource and Referral Agencies
- National Association of Private Geriatric Care Managers
- National Child Care Association
- National Endowment for Financial Education and the Financial Planning Association
- National Military Family Association
- NCOA's National Adult Day Services Association
- Save and Invest.org (which hosts a unique military section)
- Senior Housing Net
- The Armed Forces Legal Assistance
- U.S. Department of Health and Human Services

We receive regular data feeds from local oversight bureaus for adult care providers state child care agencies with information on licensed providers. Local oversight bureaus provide the same information for adult care providers. Our Researchers confirm that the adult/child care provider is still complying with local regulations prior to providing a referral to a Service Member or family member. They also contact the Local Ombudsman Program to confirm this information. For confirmed, matched referrals, Military OneSource Consultants, Work/Life Specialty Consultants, or Researchers speak directly with every provider before a referral is made. This telephone research process translates into daily database updates across service types. Through our searching process, database information is corrected, updated, added, removed or enhanced. This updating technique results in callers receiving the most accurate, up-to-date information available.

When a Service Member or family member calls our Work/Life Specialty Consultants for support, he or she is interviewed regarding the specific profile of need and will be referred to a local resource that is tailored to the criteria specified in the consultation. Our Work/Life program will include 24/7 access to the Work/Life section of the Military OneSource website with articles, tip sheets and checklists. Users can also access the resource locators which guides Members through the process of selecting adequate

adult care, provides alternative caregiving options and educational materials, and generates a customized set of materials to help them make informed choices.

Work/Life Assessment and Consultation Process. To ensure that Service Members and their families have access to the highest quality Work/Life services, ValueOptions relies on our Work/Life subcontractor Work Place Options (WPO) to provide Work/Life training to Military OneSource Consultants and to oversee the Work/Life staff that will be providing Work/Life research and specialty consultation to Members. WPO oversees the hiring, training and supervision of the Research Specialists (Researchers) and Work/Life Specialty Consultants who are co-located with the Military OneSource service delivery teams.

This Work/Life team includes childhood experts, adult care experts, education experts, special needs experts, and convenience service experts who handle cases as appropriate to their field of expertise. WPO is unique in the Work/Life industry as recognizing that while the skill sets overlap for these experts, the knowledge of their particular field is specialized and essential to providing the best possible consultation and resource research. As WPO continuously develops resources to meet our client needs, they will be integral to maintaining and growing the Work/Life database that will serve Military OneSource Members. WPO staff maintains responsibility for the quality of the Work/Life services provided for Military OneSource, and continuously report to ValueOptions on the quality of their services. ValueOptions will continue to be responsible for monitoring their performance. WPO's shared involvement in the delivery of Work/Life services for Military OneSource ensures that both Service Members and their families are seamlessly receiving the most expert assistance available.

Work/Life Network. The Work/Life database has been built over two decades and is updated as Research Specialists search for providers. It currently contains over one million resources across the country. In addition, we receive licensing information from state and local oversight bureaus. We compare these state listings with providers in our database, remove providers who are no longer licensed, and add newly licensed providers. Providers and local community resources can also request to be part of our database.

PWS 4.0 MISSION REQUIREMENTS

MISSION EXECUTION TASKS

We offer a comprehensive approach and technical architecture for managing the toll-free, website, and Call Center Operations for Military OneSource. Our highly capable and EAP/call center experienced teams will use our industry-leading Avaya telephony and CONNECTS platform technology to support the programmatic and EAP functions within the mission execution environment. Our proven CONNECTS platform provides near real-time visibility into all Military OneSource program activities and provides a valuable feedback loop to the Government.

Our CONNECTS platform, discussed throughout this document, is the name of ValueOptions' dynamic computing environment, used to support, manage, and provide EAP and behavioral health services to the 32 million members we serve. This fully integrated suite of Web-based, special purpose applications draws strength from the use of the latest advances in open source database and application development technologies that support seamless interoperability and on-the-fly connectivity to backend clinical and business operations system. The CONNECTS platform was specifically designed to reduce the

administrative burden imposed on providers and Care Managers, allowing them to concentrate on the members rather than paperwork. The system emphasizes paperless transactions and ensures instantaneous access to real-time comprehensive program information, as well as enabling and supporting improved communications and increased on-the-job collaboration. As a result, CONNECTS has significantly enhanced ValueOptions' coordination of care and service delivery capabilities for the members we serve around the world.

Additionally, the ability of the system to monitor, collect, and report program information will provide managers at all levels the ability to assess program activities in near-real time and to conduct trend analysis to support an agile response to both positive and negative emerging issues and trends.

CONNECTS ENVIRONMENT

ValueOptions' comprehensive information management system platform is capable of supporting a complete array of innovative, integrated EAP and Work/Life program functions. Through our use of CONNECTS, we are able to meet the specific outcomes outlined in the PWS and deliver a system that delivers innovation through technology differentiation. A graphical depiction of our CONNECTS platform is provided below:
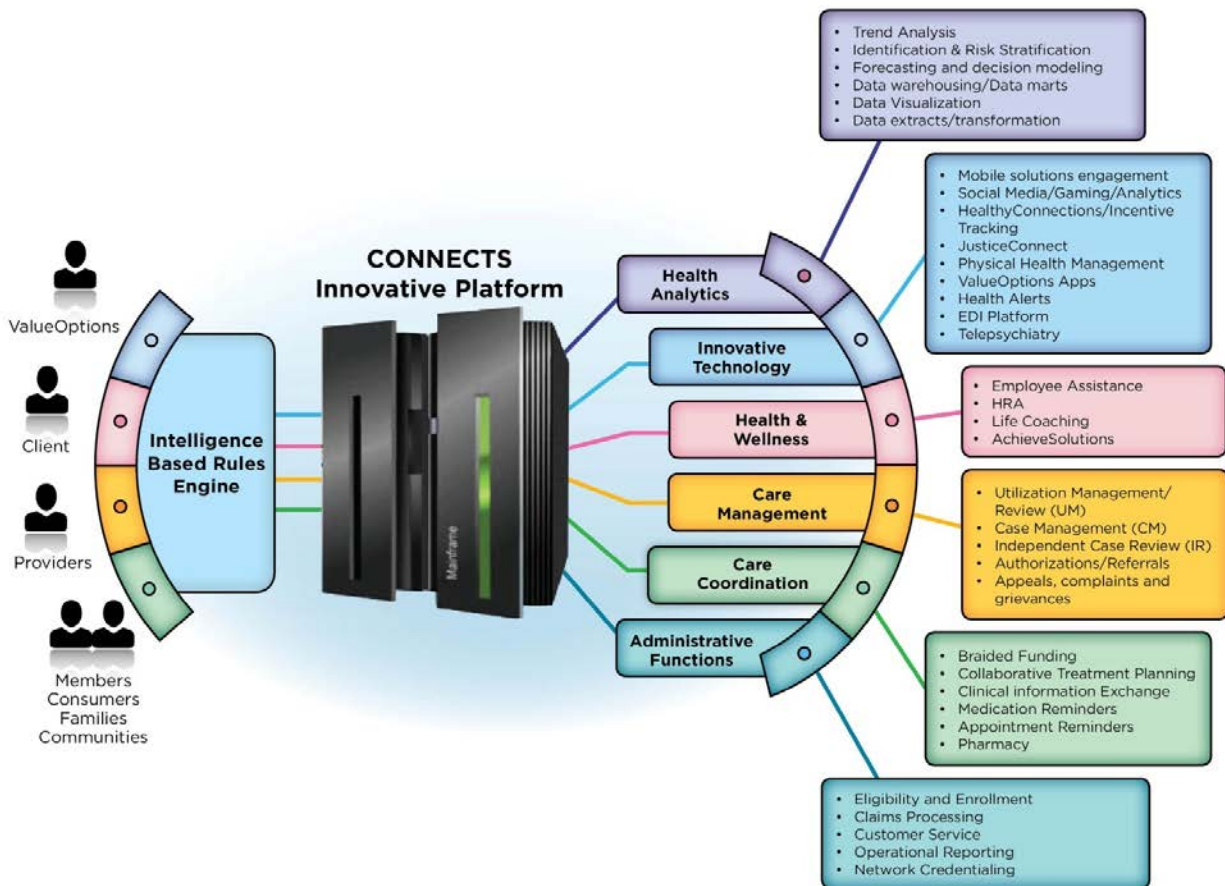
CONNECTS is a suite of fully-integrated applications designed to support our innovative integrated healthcare programs. In particular, the CONNECTS platform represents over 30 years of behavioral health and wellness experience and associated best practices in coordinating, managing and supporting integrated EAP for our clients and members. This integrated computing environment has significantly

SOURCE SELECTION INFORMATION–See FAR 2.101 and 3.104
Use or disclosure of data contained on this sheet is subject to the restriction on the title page of this proposal.

enhanced our ability to improve the coordination of care and service delivery for the members served under our commercial, public sector and federal government contracts. Advanced capabilities have been designed throughout the system to further improve coordination of care services, and can be customized specifically for the new contract requirements.

The integrated data within the CONNECTS system provides the government with a flexible system that can be configured and customized to Military OneSource needs and improves engagement outcomes, as well as provides accurate and easily accessible data that can be used to monitor utilization and correctly identify the over and under utilization of critical services.

Military OneSource CONNECTS Platform	
Feature	Benefit to Military OneSource Program
Integrated Technology platform	• Robust, interoperable applications for the seamless integration of EAP and Work/Life services • Ability to strengthen the communication between ValueOptions, our provider network, our members and our Government client, which results in real-time data sharing, increased data accuracy, and higher levels of satisfaction for all EAP and Work/Life service recipients served under this contract
Web portals for members, providers, and clients	• No wrong door for member, provider and client access • Instant, Web-based access to information, transactions and messaging, with downloadable forms for record keeping.
System scalability and flexibility	• Customizable to meet contract needs • On-demand reallocation of computing resources to meet computing requirements, without disrupting normal operations.
Privacy Act—compliant data systems and operational security	• Role-based security model enforcement • Confidential and secure member information and claims data at all levels.

CONNECTS Application Server Hardware

The CONNECTS Enterprise Application technology resides on an IBM iSeries (AS/400) Enterprise server platform and, the specific configuration is detailed in the graphic on the next page.
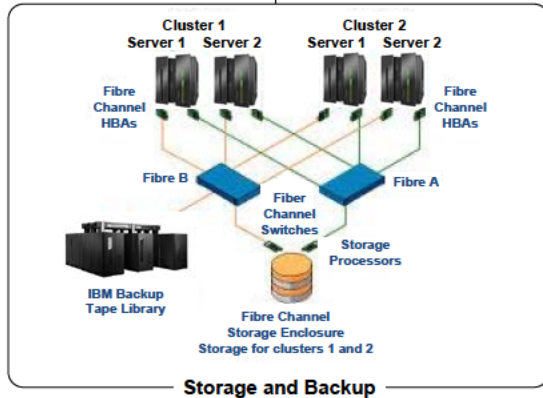
Servers Platform
- IBM® iSeries (AS/400) i5 595® application servers running IBM's V6R1 i5/OS® operating system.
- IBM i5 595® configured with multiple logical partitions including production and development environments.
- 17-way POWER5 64bit CPU with 384GB of memory, 58500 CPW Enterprise Edition®

Storage Platform
- Over 40 Terabytes of mirrored disk storage
- IBM 3584 Automated Tape Library® (ATL) containing 28 3592-E06 high-speed tape drives for fully automated backups.
- IBM 3590 and 3490E tape cartridge for client file compatibility.
- Host network communications includes four (4) 1Gbps and seven 100Mbps Ethernet adapters.

Capacity
- Over 999 million members
- 99 million claims per day
- 99 million authorizations per day
- 450,000 clients, 3 million groups, and over 450,000 benefit plans
- Sub-second response time for user initiaited searches and queries

CONNECTS Software

A summary of our CONNECTS software is provided below.

Administrative Functions
- **BenefitConnect** is our integrated on-line comprehensive repository which contains all client account information in one accessible program accessible to Military OneSource Call Center staff, which offers a reduction of processing times for customer service calls, and allows more efficient service to members.
- **FileConnect** is the infrastructure we use to support electronic data interfaces that allows for the inbound and outbound transfer of accurate data to the government and our network providers.
- **NetworkConnect** supports internal ValueOptions users responsible for all provider contracting, credentialing, provider relations, and network operations administrative processes.

Care Coordination
- **CareConnect** is our online care management system that allows our clinicians to devise, monitor, follow-up, and report on individualized care for the members they serve.
- **ProviderConnect** is our secure Web-based application that allows providers to perform eligibility inquiry, claim status inquiry, claims submission, benefit inquiry, and member registration.

Care Management
- **CareConnect** is our online care management system that allows our clinicians to devise, monitor, follow-up, and report on individualized care for the members they serve.
- **ServiceConnect** is our online member services management system that delivers quicker, better and more efficient member service to behavioral health members and providers through powerful tracking and analytics capabilities.
- **QualityConnect** is our secure, Web-based adverse incident and quality of care/service (QOC/QOS) tracking application.

Benefits of our Software

The key benefits of our integrated software architectural approach ensure:

- The comprehensive, member-centered record consisting of behavioral health data and physical health data will be centrally stored on the CONNECTS platform.
- Our providers can easily send case note data to ValueOptions to populate the member record stored on the CONNECTS platform.
- The CONNECTS platform "system entry point", which includes Web-based portals, provides a seamless presentation view for Military OneSource Consultants, providers, Military OneSource members, and clients to access and process integrated member-centered records.
- The CONNECTS platform eliminated the need to duplicate or replicate core functions and capabilities already available on the network provider's system.

Our customizable suite of integrated software coupled with our member-centered approach to data management and care coordination results in a targeted and comprehensive offering that is specifically designed to support the Military OneSource EAP program model design. Access to software specifically developed for and used in this contract will be maintained through a limited number of licenses and at levels appropriate for and needed to fulfill the requirements of this contract.

1. CALL CENTER/WEBSITE OPERATIONS

PWS 4.1 MILITARY ONESOURCE CALL CENTER OBJECTIVE AND SECTION L17, FACTOR 1, 1.A

Approach to Call Center Operations. ValueOptions' EAP W/L behavioral health and wellness program offers the entire range of services required by the RFP, supported by state-of-the-art technology and equipment. Our services are backed by the resources, processes, and personnel to assure outstanding service delivery. Through one central toll-free number, Value Options will continue to offer unlimited access to information, referral, and counseling services to both stateside and international callers. We have national breadth as well as the ability to drill down to local resources 24 hours a day, seven days a week. Outside the Continental U.S. (OCONUS) the dialing procedure is identical to the process described above with one exception: OCONUS callers will also include an AT&T country specific access code to their dialing sequence. They will connect directly to a Consultant by dialing, + 800-342-9647, where "+" indicates the country-specific access code.

As a direct result of our high quality service delivery and program management, ValueOptions maintains a high level of satisfaction with our commercial and Government customers. The results of an independent 2011 customer satisfaction survey showed a 98.1 percent satisfaction level with ValueOptions, including key areas such as *identification of customer's needs*, *problem solving* and *timeliness of response*. These customers value our experience in blending people, processes, and technology into effective solutions that maximize customer satisfaction.

The ValueOptions Team will comply fully with the requirements of **Section L17, Factor 1, 1.a.** throughout our performance on this contract. Our extensive experience with hundreds of EAP and Call Center implementations and transitions, our innovative and advanced technology used in support of successful transitions and proposed in this contract, and our skilled personnel will result in continuity of operations, along with uninterrupted flow of Military OneSource Call Center services throughout contract performance. The information which follows details our approach, which encompass all resources and development of resources, processes, personnel, materials, training, equipment, and technology necessary to provide Service Members and their families with unlimited access (via 24-hour, toll-free telephone and on-line/Internet) to stateside and international information, referral, and counseling services available through a centralized source.

PWS 4.1.1 MILITARY ONESOURCE CALL CENTER MINIMUM REQUIREMENTS

ValueOptions has a location in Arlington, Virginia within the National Capital Region (NCR) that meets all of our facility needs for the Military OneSource program and personnel. The building, located on Wilson Boulevard within two blocks of a Metrorail station on the Orange Line is located in a high rise building (not on the ground floor) with card reader access, and will be secured 24x7. In addition to the Metrorail proximity, ample garage parking is available with other amenities such as numerous restaurants and shopping nearby. Additionally, we have our location in Chesapeake, Virginia at 1434 Crossways Boulevard, which contains approximately 100,000 sq. ft. of space. Based on our previous experience implementing large call centers for customers (including Military OneSource), we recognize the value of back-up and redundant capabilities in multiple locations. This methodology ensures a continuous flow of operations should one call center encounter a disruption of services. Military

OneSource Consultants, subject matter experts, telephonic counselors and research staff are located in each facility to serve as redundancy for one another in the event of call surge or disaster recovery.

All Call Center functions, including but not limited to: inbound and outbound call activity, telephonic and on-line counseling, specialty consultation, spouse education and career counseling, and referral/educational research, will be performed at each location. However, in the NCR, the ValueOptions Team provides additional services to those military Service Members who are wounded, ill, or injured and their family members. These two specialized functions work closely both Military OneSource Call Centers to seamlessly ensure the same communication, information, and resources are accessible to all Military OneSource personnel, regardless of the physical location of the Service Member. This coordination of care is accomplished through ValueOptions' CONNECTS platform.

The CONNECTS platform was specifically designed to support innovative EAP and Work/Life programs and consists of a highly sophisticated, dynamically scalable suite of fully integrated applications that support the provision of EAP and Work/Life services from start to finish. ValueOptions' CONNECTS system customer service module, ServiceConnect, offers Military OneSource Consultants an interactive desktop interface to enter relevant call information. In addition, ServiceConnect provides the Military OneSource Consultant with immediate access to a Service Member's integrated Military OneSource history ensuring they never have to repeat their information. This application greatly enhances call center productivity and more importantly, allows our staff to focus on the Service Member's needs instead of the administrative functions associated with the call.

Call Center Staffing. Staffing professionals from ValueOptions' Human Resources and Call Center Operations Departments analyzed the detailed Military OneSource Call Center Activity reports and call volume statistics contained in the 2011 RFP attachments. Based upon the review of the data, and experience from hundreds of EAP and call center implementations, we developed a staffing model that enabled ValueOptions to fully staff our call centers with skilled, qualified personnel to meet all the contract requirements.

We consistently evaluate available information on utilization, combined with an industry-standard call center/workforce management program. This program contains an algorithm, known as Erlang C, which calculates the staffing requirements of a call center's Automatic Call Distribution (ACD) group by using random distribution patterns based on call arrivals, handle time, and after call activity. In developing a staffing model, ValueOptions utilizes key performance indicators such as monthly usage statistics, average call handling time, vacancy rate projections and expected productivity (cases per day). For Military OneSource, staffing professionals from ValueOptions' Human Resources, Call Center Operations and EAP leadership, analyzed the detailed Military OneSource Call Center Activity Reports and call volume statistics to create staffing projections that enabled ValueOptions to successfully operate the Military OneSource call centers.

Our team consists of master's-level professional Military OneSource Consultants with a minimum of three years of practical experience in social work or other fields related to human services, with specialized training in EAP and Work/Life issues, and with formal orientation to military life and culture. As the frst point of contact for all incoming calls, the Military OneSource Consultants are at the front line in answering and addressing Member inquiries. After collecting demographic information to create a case record for reporting, Consultants conduct a brief triage and needs assessment. They engage

callers by providing motivational support, and also determine the most appropriate resources to meet callers' needs. Additionally, Military OneSource Consultants ask callers a brief series of questions to determine whether the services requested lie within the scope of the program.

Military OneSource Counselors assist our Military OneSource Consultants in case resolution. Military OneSource Counselors are licensed master's-level Counselors who perform telephonic short-term, problem solving non-medical counseling. If there is any question as to the appropriateness of a request, the Military OneSource Consultant may make a warm transfer to one of our Military OneSource Counselors who will then conduct a more thorough needs assessment to determine whether the request falls within the program's scope. This additional assessment, while necessary for only a small percentage of callers, is one additional safe guard to ensure that we provide linkages to the most appropriate resource and remain within the scope of the expectations the Government has for the Military OneSource program.

If the caller requests assistance with a Work/Life issue, the Military OneSource Consultant will refer to a Work/Life Specialist with expertise in addressing complex childhood services and elder care and quality of life issues. Both the Work/Life Specialists and the Military OneSource Consultants and Counselors receive further support from our Research staff members who each possess at minimum a bachelor's degree or commensurate experience. Examples of commensurate experience include a military spouse, veteran, or wounded warrior with good computer and research skills; an individual with good research and computer skills, an associate degree, and significant office experience; or an individual with good computer and research skills and significant work experience in a setting that requires researching and gathering information for a specific purpose. (e.g. a military spouse with good research skills) who gathers The Researchers gather educational resources and materials requested by the Member into informational packets. Participants with child care needs will be warm transferred or provided referrals to Child Care Aware of America.

The Military OneSource Consultant will maintain overall responsibility for the calls that he or she receives, relying on both internal and external resources as needed. Internal referrals to parties such as Military OneSource Counselors, financial counselors, Work/Life Specialists, spousal career counselors and the Wounded Warrior Program are conducted using a warm transfer (no-hold) process. The user's experience remains seamless, with the knowledge that he, or she, can contact the same Military OneSource Consultant to address any questions or concerns following the initial interaction. If a Military OneSource Consultant needs to refer externally to a resource such as TRICARE, community resources, external providers, or a military treatment facility, a similar process occurs in which the Military OneSource Consultant conducts a warm transfer (no-hold) linkage to the third-party. This allows the Military OneSource Consultant to remain in contact with the caller at all times throughout the referral process.

- **National Capital Region** (**Arlington, Virginia**). Staffed with full-time Military OneSource staff members responsible for Member inquiries, telephonic and Work/Life Specialty counseling, and information and referral research needs.
- **Chesapeake, Virginia**. Located near ValueOptions' corporate headquarters, the full-time Military OneSource staff members perform the same functions as the call center in the Arlington. Chesapeake (Norfolk, VA) is at the center of Hampton Roads, one of the nation's largest military complexes, and is host to installations for each branch of the service. This proximity enabled us to

recruit, hire, train and retain former military, military spouses and others with relevant experience as our Military OneSource program employees.

ValueOptions' overall approach to staff recruitment and training to maintain the staffing levels on this contract are explained further in **Section 7.1.8**.

Call Center Operating Procedures and Processes. Once a call is received through our integrated Avaya and Multiprotocol Label Switching (MPLS) network, the workflows control the interaction with the Service Member, along with the processing and fulfillment of the Service Member's request to satisfaction. Details concerning the individual process steps are available for review in **Section 4.1**.

Call Center Technical Infrastructure. Our state-of-the-art telecommunication technology from Avaya, Sprint, and Verizon delivers services in support of Military OneSource Call Center operations. Our call center technology has been successfully implemented by ValueOptions in many private sector industries and with Government clients in support of nearly 32 million members that we serve throughout the US. The table below describes our advanced technical infrastructure Military OneSource unique features and benefits.

Feature	Benefit
Optimal Call Flow	Improves the average speed of answer by directing calls to the appropriate queue -- ensures outstanding responsiveness and overall quality of service.
Workforce Management and Reporting Tools	Ability to monitor metrics and manage and plan for call volume and meet surge requirements.
Virtual Routing Capability	Allows instantaneous routing of calls to available Military OneSource consultants, regardless of location, and seamlessly allows for automated call overflow handling with no human intervention.
Call Analyzer	Real-time call management and historical reporting solutions for call

Avaya Telephone System. The Avaya architecture used by the ValueOptions Team is designed for high reliability through the deployment of separate servers. Each Avaya component in our architecture is duplicated for maximum redundancy including servers, UPS, modems, switches, and Internet Protocol Server Interface (IPSI). Our mirrored call center infrastructure allows the systems to provide automatic load balancing and redundancy for voice and data to eliminate any service interruptions using the Avaya Telephony platform. Leveraging this industry-leading platform supports optimal

> When a Military OneSource client or provider calls the 800 line, the Avaya system easily matches the call center personnel resources and skills to call volumes and caller needs. The Avaya system provides our staff and Military OneSource clients with optimal call flow.

call handling protocols. We can easily accommodate large increases in phone call volume and widely varying peak call times. Our central Avaya infrastructure handles all call routing, management, and reporting requirements. This central telephone switch provides dynamic, seamless routing of calls to multiple call centers as dictated by business rules, a call spike situation, or in the event of a technical issue in any call center. Incoming calls are delivered directly to the two Military OneSource Call Centers via dedicated voice circuits. These circuits are sized to accommodate the projected number of simultaneous calls, transfers, multi-party conferencing, and call-backs. The sizing criteria take into account the need for 90 percent of incoming calls to be answered within 20 seconds by a live agent. All calls are delivered to the two service centers over the Military OneSource dedicated and secure MPLS. The combination of the Avaya technology platform, coupled with a MPLS network architecture, ensures

the availability of the call center and the successful delivery of all Military OneSource calls. The figure below illustrates the call delivery mechanism under normal operating conditions.

The ValueOptions Team Technical Infrastructure for Call Delivery
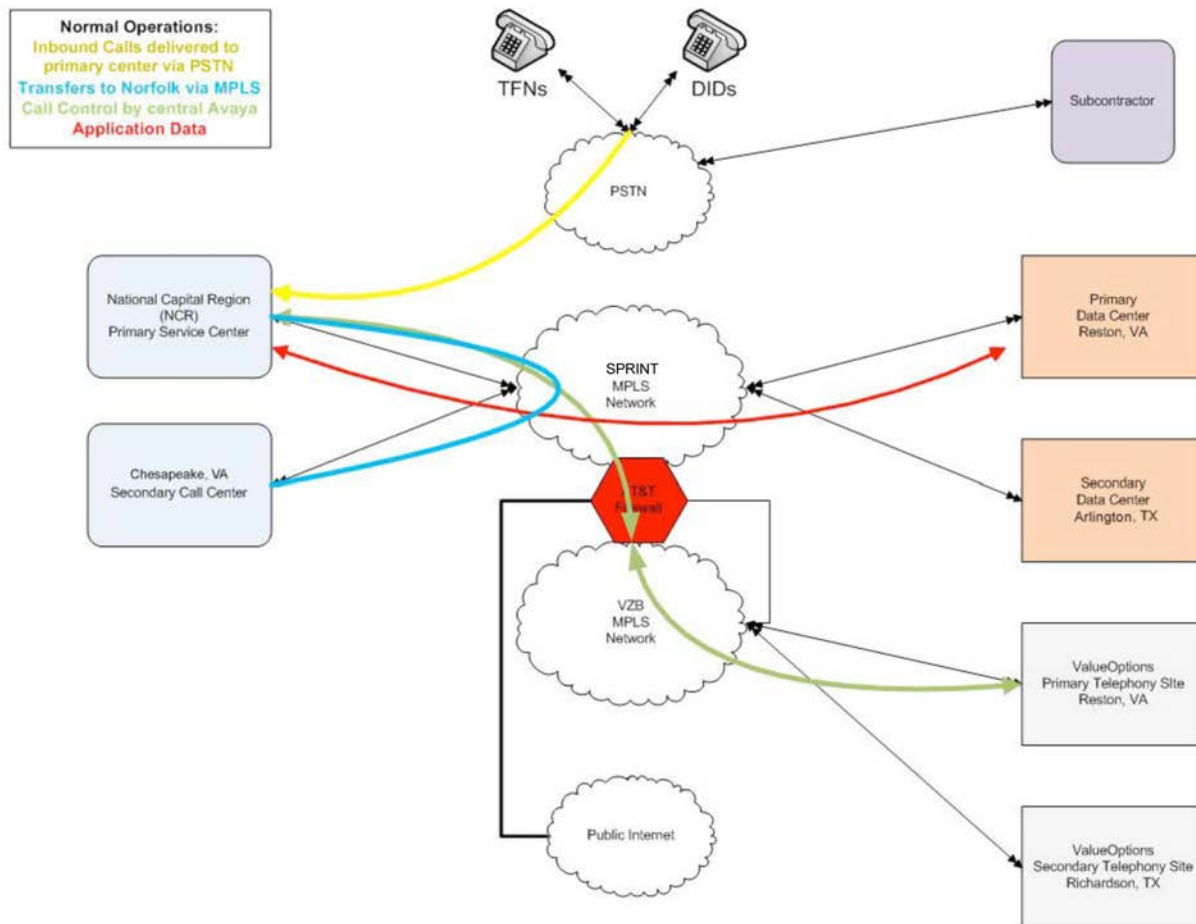
Call Management System. The Avaya Call Management System (CMS) allows The ValueOptions Team to collect and monitor Automatic Call Distribution (ACD) facilities and personnel. We can create/customize reports on the status of agents, splits/skills, trunks, vectors, and vector directory numbers. CMS users have the ability to view and store historical CMS reports, view real-time reports, and view integrated reports at a workstation. If a call is received, and the primary designated customer service staff is on a call assisting another Service Member, the system applies priority routing and overflow, sending the call to a smaller group of reserve staff, if necessary. Avaya's CMS provides our call center with tools to monitor and analyze virtually all telephonic activity within the call center. Avaya provides advanced IP-enabled business communications applications that enable the ValueOptions Team to interact and share information in a real-time application. CMS monitors the operations of and collects data from the Avaya switch which is then organized into reports which assist the team in managing the call center. Avaya CMS provides an all-encompassing suite of reports;

historical for trending and on-line, real-time to ensure agent productivity and performance measures are met. A wide variety of telephone performance management reports are available through the Avaya CMS including, but not limited to: daily, weekly, and monthly telephone accessibility; agent productivity and call responsiveness; online real-time reporting and agent monitoring, to manage expectations, performance guarantees, agent schedule adherence, and daily productivity standards. In the event that it is required, virtual routing functionality within our telephone system allows for calls to route to an alternate site of the Military OneSource Consultants. In a Virtual Call Center environment, although in geographically separate locations, the system recognizes the Military OneSource Consultants as a single call center.

PWS 4.1.1.1 MILITARY ONESOURCE CONSULTANT QUALIFICATION AND EXPERIENCE

The ValueOptions call centers are staffed with master's level Military OneSource Consultants who possess expertise in areas such as stress management, death and grief, childhood services, elder care, and relationship issues. Complimenting these professionals is a team of researchers who gather all materials, educational resources, and referral information requested by the Military OneSource Service Member into easy to understand comprehensive packets. These staff members work as one Military OneSource team, regardless of their physical location, to provide quality service to Military OneSource Service Members.

In addition, our Military OneSource Consultants have a minimum of three years relevant practical experience and possess a master's degree from an accredited college or university in social work or other human services fields. We prefer Military OneSource Consultants to have an LSW, LCSW, MSW, and/or LPC. The ValueOptions Team leverages our internal Human Resources Department personnel, along with our Professional Employment Organization (PEO) staffing firms, to hire consultants with military experience. A special emphasis is placed on hiring military spouses, veterans, retirees, and wounded warriors who understand the military environment, including the ethnic and cultural diversity of the military community.

All Military OneSource Consultants are required to have previous experience with EAP, mental health and/or substance abuse treatment programs. In addition to the qualifications listed above, Military OneSource Consultants also have:

- experience with and knowledge of military support services and community agencies
- knowledge of mandated procedures for child and elder abuse situations
- knowledge and experience in core service areas of child development, parenting, adoption, education, and services for older adults
- demonstrated solid clinical judgment with the ability to function autonomously, and understand when to refer to TRICARE or other insurance provider
- diverse experience in counseling, social work or mental health services
- EAP and substance abuse experience
- good organizational skills and ability to function effectively in an interdisciplinary setting
- excellent customer service, communication, business and technical skills

The ValueOptions Team's overall approach to staff recruitment and training to maintain the staffing levels on this contract are further described in **Section 7.1.8.**

PWS 4.1.1.2 SINGLE NUMBER DIALING

ValueOptions uses a Sprint Direct, single toll-free number to provide global access. The toll-free number can also be used in over 135 international locations, Canada, and in all US OCONUS territories that use the North American Numbering Plan.

Continental U.S. (CONUS) Callers. Members and their families are able to reach the Military OneSource Call Center using a standard dialing format of 1-800-342-9647. The Military OneSource Counselor/Consultant then assists the caller with his or her request for information or non-medical counseling service needs.

Outside the Continental U.S. (OCONUS) Callers. The dialing procedure is identical to the process described above with one exception: OCONUS callers will also include a country-specific SPRINT access code to their dialing sequence. They will connect directly to a Consultant by dialing, + 800-342-9647, where "+" indicates the country-specific access code. We publish and maintain the country-specific access codes on the Military OneSource website. OCONUS callers are also able to connect with Military OneSource by calling collect.

Call Center Redundancy. In both Military OneSource call centers, local Avaya media gateways are communicated with the Avaya 8710 servers located in the NCR. The CMS and Modular Messaging (MM) architectures are located in the NCR Call Center facility. This facility is part of The ValueOptions Team enterprise-wide MPLS network provided by Verizon Business (VzB). To maintain the integrity and security of the Military OneSource-dedicated network architecture, VzB provides and manages a firewall at the bridging point of the MPLS networks. This firewall only allows Military OneSource telephony-related traffic to enter or leave the VzB MPLS network. The CMS summarizes call statistics and saves that information in defined incremental snapshots. The saved statistics allow for review of call volume, average speed of answer, abandonment rates, talk time, and Consultant activities.

In order to segregate CMS data for Military OneSource from other ValueOptions Team information, a separate ACD was created to support tenant partitioning. Tenant partitioning allows the central Avaya to host multiple independent clients on one system without co-mingling of data and access. Avaya's Communication Manager (CM) supports multiple partitions and attendant groups. This function enables the ValueOptions Team to report call center data by customer and assure that service levels are met for each customer as opposed to aggregate numbers. Additionally:

- Multiple attendant groups can be assigned to each partition. Stations, hunt groups, and other endpoints assigned to a Class of Service (COS) can be partitioned. Network routing pattern preferences also support the assigned tenant partitioning, as well as access to each partition. Tenant partitioning also allows you to assign a unique music source for each tenant partition for customers who are put on hold.
- CMS can be shared by setting up an ACD for each tenant partition. Permission rights can be set to only allow authorized personnel to access the information in each ACD.
- MM can be set up with different groups for each tenant partition. Permission rights can be set to only allow authorized personnel to access the information in each group.

In the event that voice circuit capacity is unavailable in the NCR facility, the VzB will automatically re-route calls to the other call center, referred to as Network Call Redirect. This is an automatic process and causes no disruption to call delivery. When voice circuit capacity is available in the NCR but agents are not available to answer calls (a building evacuation for example), the call center manager can manually activate call rerouting to the secondary call center. Pre-defined routing rules are programmed in the Avaya system. When an emergency re-route is required, the call center manager will dial a specific extension, enter a pin code and calls will immediately be redirected to the secondary center. If the primary Avaya telephony infrastructure in NCR is unavailable, the secondary system which is located in Richardson, Texas will assume responsibility for call control, CMS, and MM.

In the event of a disaster, the ValueOptions Team has designed its central Avaya architecture to ensure a resumption of call handling should the primary central Avaya telephony platform, located in the NCR, suddenly and unexpectedly be out of service. The ValueOptions Team has deployed a mirror image of its Avaya phone system, including peripheral services in a hosted, premier data center in Richardson, Texas. This system is kept in hot-standby mode and with all system configurations automatically synchronized to the system in Reston. In the event of a catastrophic problem in the NCR, all inbound calls to the Military OneSource Call Center will be automatically routed through our Richardson, Texas location, at which time the redundant, mirrored image Avaya telephony architecture in Richardson, Texas automatically assumes the lead call management functions for the Military OneSource Call Centers.

In ValueOptions' redundant Avaya telephony system, the system in the NCR is designated as the primary with the system in Arlington designated as the secondary. In this configuration, the secondary site constantly synchronizes with the NCR and is therefore ready to assume responsibility as the primary telephony switch at any time. As stated above, the media gateways in the call centers are always communicating with the 8710 servers in Reston. If the gateways cannot communicate with the NCR Call Center, they will automatically register to the predefined secondary Avaya in Richardson.

Back-up Call Center Capability. The ValueOptions Team appreciates the importance of smooth service delivery and continuity in the event of planned or unplanned outages and has architected the telecommunications platform to support 24 hour a day, seven day a week systems availability, except during periods of scheduled system unavailability agreed upon by Military OneSource. We leverage the CMS that is part of our telecommunications platform to manage and analyze call patterns to determine peak call times and to manage staffing to meet contract requirements. As a result, we maintain a formal and comprehensive Business Continuity Plan that promotes minimal disruption of service in the event that the primary call center experiences a disaster or temporary closure. The graphic on the next page depicts our backup call center location and configuration.

Backup Call Center Structure

In the rare event that both Military OneSource call centers are not available to accept calls (such as during a hurricane), incoming calls we be automatically routed to a sub-set of ValueOptions licensed Care Managers staffed in our Morrisville, NC; Latham, New York and/or Coppell, Texas offices. These "remote" Care Managers are fully trained on the Military OneSource program and have the ability to not only appropriately handle the incoming calls, but to document calls in the secured Military OneSource database.

Business Continuity. All call centers are pre-configured to automatically re-route calls in the event of partial voice trunk outages. Grounded on the state-of-the-art national telecommunications infrastructure The ValueOptions Team has put in place, we can seamlessly and instantaneously re-route blocked call traffic. This is accomplished by using our Network Call Redirect service. The Network Call Redirector is the automatic re-routing of the Military OneSource toll-free traffic if our system were to ring busy or if there was a 'ring no answer' situation. This process is automatic, transparent to Service Members, and there is no down time. For situations where service is disrupted due to power outage, building evacuation, or other situations, all incoming calls for the primary call center will be re-routed to active agents in the back up call center within five minutes. As such, we will proactively re-route the calls manually and return to normal service proactively when the power outage, building evacuation, or other disruption is over.

Issue Notification. The ValueOptions Team policy requires all users to be notified of any operational issues with the systems that may exist. Our Technology Call Center (TCC) is responsible for sending out e-mail communications detailing the operational issues that include business and disaster recovery;

application, data networks, and telecommunications unscheduled downtime; other issues that affect operations from continuing during business hours; and planned IT maintenance. The applicable staff will be notified in the same manner within 15 minutes from the point the issue was identified. This same method of communication is followed to provide users with a report of the resolution or status of the existing issue on an hourly basis. If e-mail is not available, a call will be placed to provide the appropriate notification.

PWS 4.1.1.3 CALL CENTER TRIAGE FOR SECO

Upon successful transition of the SECO program to the new SECO program provider, our Military OneSource Triage Consultants will continue to answer and transfer calls from military spouses calling for: education or career information, counseling, information regarding the My Career Advancement Account (MyCAA) Program, or the Military Spouse Employment Partnership (MSEP) Program. During normal business hours, calls will be warm-transferred to a SECO Career Center Counselor. We will also enter the caller's information in the Military OneSource Contractor's CMS for call accountability purposes. Please see Attachment 1, SECO Transition Plan, for a detailed description of the transition process, elements, and timeline. This plan can be presented to the Government in Microsoft Project or Excel at the Government's request.

PWS 4.1.1.4 AFTER HOURS CALLS

For calls received outside of SECO business hours, our Military OneSource Triage Consultants will take a message and log the message as determined in collaboration with the new vendor to be returned by the SECO Career Center staff within three business days. We will work collaboratively with the new vendor to determine the most appropriate way to get them the necessary information.

PWS 4.1.1.5 WARM HAND OFFS

MyCAA school representatives, MSEP partners, or corporations who call Military OneSource Triage Consultants will be warm-transferred and also receive a telephone number (provided by the Government) to the SECO MyCAA School Liaison team or to the SECO MSEP partner liaison staff. For calls outside of normal SECO Career Center operating hours, our Military OneSource Triage Consultants will take a message and log the message to be returned by the SECO Career Center staff within the next three business days. We will work collaboratively with the new vendor to determine the most appropriate way to get them the necessary information.

PWS 4.1.1.6 CALL CENTER STATISTICS

The ValueOptions Team Call Center Managers use the Avaya CMS to capture and monitor call center statistics including, but not limited to: number of total incoming calls, total calls answered, number of calls answered within 20 seconds, number of calls abandoned, number of calls placed on hold in total duration of more than five minutes, number of calls completed successfully to the Service Member's satisfaction, and number of call backs completed.

No personal information or individual call information is stored in the CMS database, preserving the caller's privacy and confidentiality. The Avaya CMS summarizes the call statistics and saves that

information in 30-minute incremental snapshots in the CMS data, and the information is automatically uploaded each month to the CONNECTS System. The call center manager provides the required call statistics to the Military OneSource Program Director on a daily basis.

CMS monitors the operations of and collects data from the Avaya switch which is then organized into reports which assist the team in managing the call center. CMS provides real-time information which allows us to make immediate decisions to redistribute calls to resources or redirect calls in the rare event it is required. A wide variety of telephone performance management reports are available through the Avaya CMS, including but not limited to: daily, weekly, and monthly telephone accessibility; agent productivity and call responsiveness; online real-time reporting and agent monitoring, to ensure expectations, performance guarantees, agent schedule adherence, and daily productivity standards are met.

The ValueOptions Team's real-time reports provide supervisors the ability to monitor the call center's performance and status. Agent productivity can be compared at a glance to determine who may need help in speeding up time spent in after call work. Access to such data is vital to serving Service Member's needs most efficiently and effectively. Real-time reports can be updated as often as every three seconds and summarized as often as every 15 minutes. Historical reports are available in intervals of 15, 30, or 60 minutes; daily; weekly; and monthly. Integrated reports include data for a specified start time in the past 24 hours up to and including the moment the report is generated.

PWS 4.1.1.7 COORDINATING SERVICES FOR WOUNDED WARRIORS

As directed by the National Defense Authorization Act (NDAA) of January 2008, ValueOptions provides designated staff to conduct specialty consultations for wounded warriors contacting Military OneSource. These Specialty Consultants have extensive experience in the social and behavioral sciences in addition to in depth knowledge of the issues impacting wounded warriors with disabilities such as severe burns, blindness, deafness, amputation, spinal cord injuries, Traumatic Brain Injury (TBI) and Post-Traumatic Stress Disorder (PTSD). They also have an expert knowledge of Veterans Affairs (VA) programs, the GI Bill, Relocation, Transition Assistance Programs, Line of Duty (LOD) determinations, medical care and safety programs, military regulations, and DoD directives related to wounded warriors, recovery care, and specialized Military Treatment Facilities. It is from this experience that ValueOptions Specialty Consultants are able to arrive at quick solutions to address caller issues and questions related to wounded warrior programs, services and benefits, while also identifying appropriate Federal, state and local resources to assist them.

Our Specialty Consultants have forged strong collaborations with the Service-specific DoD programs, including:

- Military Wounded Warrior programs: Army Wounded Warrior Program (AW2), the Navy Safe Harbor Program, the Marine Corps Wounded Warrior Regiment, and the Air Force Wounded Warrior Program (AFW2)
- Veterans Affairs
- The Department of Labor

With these collaborations, Specialty Consultants are able to facilitate resolution of any type of issues that wounded warriors contacting Military OneSource Wounded Warrior Resources are experiencing. In addition, these Military OneSource Wounded Warrior Resources Specialty Consultants are experienced in providing a secondary level of support to the wounded warriors contacting Military OneSource in order to facilitate resolutions of issues not previously resolved at the Service and Agency level. Specialty Consultants have resolved more than 2,000 cases for wounded warriors contacting Military OneSource over the past year. The Specialty Consultants assist wounded warriors with a foremost focus on the emotional well-being of the Service Member and his/her family. Specialty Consultants first make a determination that callers have previously attempted to obtain resolution for their issues through the Services or the VA. Specialty Consultants educate callers about the services available to them through the Services and the VA. When a caller has not previously attempted contact with the appropriate service, Specialty Consultants conduct a warm transfer to facilitate connection to the appropriate services.

The Specialty Consultants provide expert assistance finding services and resources across the entire spectrum of benefits and programs available to support wounded warrior recovery. They identify and coordinate resources from organizations and agencies such as the Defense Center of Excellence for Psychological Health, Veterans Employment and Training Service, Defense and Veterans Brain Injury Center, Health and Human Services, National Institutes of Health, Centers for Disease Control and many federal agencies beyond the DoD, Veterans Affairs, and Department of Labor as necessitated by caller concerns. It is because of their skills in case collaborations with the Services and VA points of contact that our Specialty Consultants are highly regarded and often sought to provide additional support.

PWS 4.1.1.8 SPECIALTY CONSULTATIONS FOR WOUNDED WARRIORS

ValueOptions' Wounded Warrior Specialty Consultants are experienced at implementing DoD protocols to respond to all Wounded Warrior inquiries involving reports of deficiency to facilitate the development of a Plan of Action within 96 hours of the initial call. Specialty Consultants have assured the receipt of timely Action Plans by engaging in consistent procedures in the coordination of each case. Specialty Consultants conduct a thorough assessment of the caller's concerns and submit referrals to the designated Service or VA point of contact within one hour of the initial call. Further, Specialty Consultants conduct frequent follow-up calls within the initial 96 hours in the coordination between the DoD Service or VA contact and the caller to facilitate the development of the Plan of Action. In addition, Specialty Consultants coordinate services and cooperate with other agencies, including federal, state and local community organizations, to leverage resources and provide information and referral services to ensure the most comprehensive support to the Wounded Warrior and his/her family.

Military OneSource's Wounded Warrior Resources uses a process that facilitates efficient organizing, cataloguing, indexing, searching, retrieving, archiving, and purging of electronic files to cross-reference information that is current and appropriate for wounded warriors and their families. Our document management tool allows users to organize, track, and share documents using the structured business process of knowledge management. Specialty Consultants document all relevant correspondence and information in the Government-provided, tracking system. Specialty Consultants also utilize our ValueOptions CONNECTS system to allow for greater coordination of services between the Military OneSource services and Wounded Warriors.

PWS 4.1.1.9 INFORMATION EXCHANGE TO COORDINATE WOUNDED WARRIOR SERVICES

Specialty Consultants coordinate with specific identified points of contact within the Services, the VA and TRICARE to develop plans to address the deficiencies in VA and military services experienced by Wounded Warriors. Specialty Consultants engage in frequent information exchange between the Service or VA point of contact and the Wounded Warrior in order to facilitate the development of a Plan of Action to address the wounded warrior's issue. After a thorough assessment and a determination that the Wounded Warrior is experiencing issues accessing health care or benefits or experiencing issues with a military or VA facility, the Specialty Consultant submits a referral within one hour to the appropriate Service or VA program in order develop a specific plan to address the identified issue. In the referral, the Specialty Consultant shares all relevant information required to accurately identify the caller within the military and VA systems, determine eligibility for the military or VA benefits and communicate the identified deficiency in support. Specialty Consultants assure that all HIPAA and PIP information is protected in the exchange. Specialty Consultants document all actions taken and communications in the designated case management system. Within the initial 96 hours, Specialty Consultants conduct daily follow-up with the caller and the Service point of contact to assure a connection between the caller and the point of contact. During those follow-ups, Specialty Consultants provide clarification and education to facilitate the development of the Plan of Action. Upon receipt of a detailed Plan to address the issue, the Specialty Consultant continues to maintain regular continuous contact with the caller and the designated point of contact until the issue reaches final resolution.

PWS 4.1.1.10 OUTBOUND CALLS/FOLLOW-UP CALLS

When approval for a call back is obtained from the caller during the initial call for assistance, Military OneSource Consultants or researchers/follow-up staff will follow-up with each Service Member or family member to verify the services delivered met their requirements and expectations and that no additional services are required. The processes and flow diagrams for making call backs for specific populations is available for review in **Section 5.1.3**.

The ValueOptions Team understands that other specific call backs may be required to meet emerging requirements of DoD and Military OneSource Service Members and we have provided additional information on our approach to meeting the requirement, which is available for review in **Section 5.0.7.**

PWS 4.1.1.11 TECHNICAL INFRASTRUCTURE SUPPORTS TRANSLATION/INTERPRETATION

Language Interpretation/Translation Services
Language interpretation/translation services are provided for more than ~~150~~ 170 languages. Each Military OneSource program interpreter has fluent native language and English skills, keen cognitive memory skills, and excellent customer service skills. They are trained to field a variety of calls, and they must also pass rigid internal certification programs, along with routine monitoring and evaluations. When language interpretation services are required, the Military OneSource Consultant uses our telephone system to initiate a three-way conference call with the Participant and an interpreter fluent in the language requested.

Document Translation Services

Document translation is supported by a specially-trained team. Participants needing translation forward their documents via fax, email, or US mail. We receive the document, perform the translation, and return the document to the Participant via email or mail. We track the document translation service to verify that 95 percent of all documents are translated within three business days. We regularly meet this standard for documents less than five pages in length. With the Participant's agreement, our team also follows up to evaluate satisfaction with the service.

PWS 4.2 MILITARY ONESOURCE WEB SITE INTERFACING AND SECTION L17, FACTOR 1, 1B

With ValueOptions' Military OneSource website Interface solution, Members and their families have easy access to installation-specific information, valuable tip sheets and referrals about military life, military benefits, moving, spouse training and education, special needs, deployment and reunion, singles issues, survivor/widow services, Wounded Warrior recovery, casualty and loss, money management, new parent support, reunion and combat stress, family maltreatment, and caregiver stress.

PWS 4.2.1 MILITARY ONESOURCE WEBSITE INTERFACING REQUIREMENTS

At the request of the government, representatives from ValueOptions Information Technology Department have participated in several architectural design sessions with technical representatives of the government to determine the most effective method for interfacing the Military OneSource website with ValueOptions' EAP Services website, Achieve Solutions. As a result, ValueOptions hosts and maintains the following components of the interface architecture to achieve the stated goals required by the government:

- Militaryonesource.com domain name and associated hardware components to trap and redirect all incoming domain name requests. The requests are redirected to a new Militaryonesource.mil address that has been established and hosted by the government.
- Militaryonesourceeap.org domain name and associated hardware and software components for all EAP content and media provided by the government and, proprietary content developed by ValueOptions.

PWS 4.2.1.1 MILITARY ONESOURCE WEBSITE NON-PROPRIETARY EAP SERVICE INTERFACE

ValueOptions will continue to interface the Military OneSource EAP Services website with the Military OneSource website using a secure login capability as a user option. Upon establishing a user ID and password through the registration process, Military OneSource website users may enter the secure, password-protected area of the Military OneSource EAP Services website (Achieve Solutions) to gain access to ValueOptions' award-winning EAP Services website that has been customized for the Military OneSource Service Members and their family members.

Military OneSource users will continue to access the Military OneSource website using the existing www.militaryonesource.com Uniform Resource Locator (URL) in the same fashion they have used

throughout the years. A diagram illustrating the architecture and the specific interface touch points is provided below for reference.

Military OneSource Website Touch Points
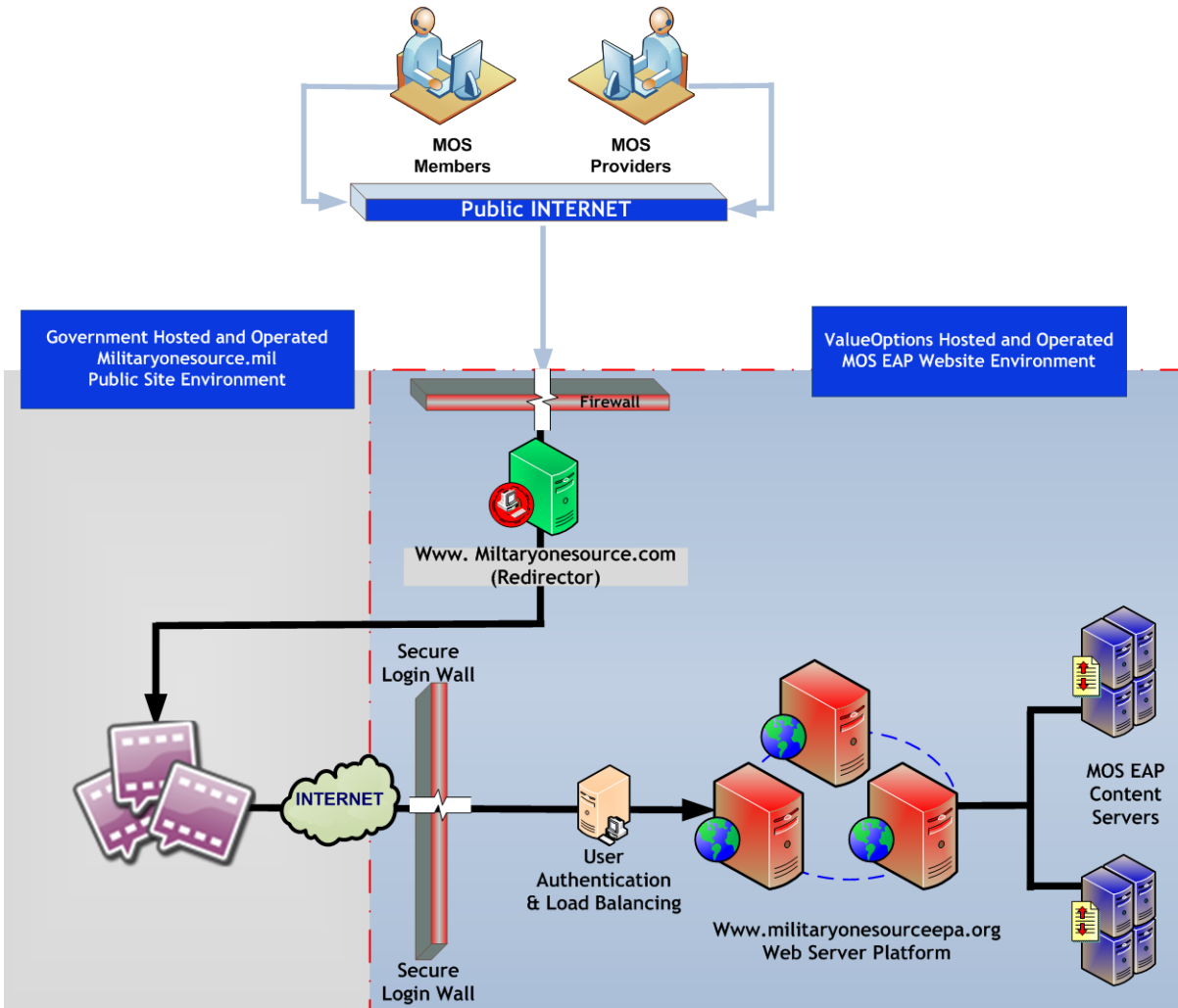
The underlying database architecture design for the Military OneSource EAP Services website was built on IBM's and Oracle's enterprise class, DB2 Universal Database (UDB) and Oracle 11i databases respectively. Both of these enterprise-class databases have capacity and transaction throughputs that can scale well beyond six million users. However, for high transaction website environments such as the Military OneSource EAP Service website, the strength and scalability of the website must be measured not simply by the number of users, but also by the number of simultaneous transactions or requests the website can process at any given time.

Because of this, ValueOptions designed the hardware platform for the clustered JAVA and .NET Web application environment using clustered, IBM's eServer, pSeries and iSeries servers. Both of these server platforms, in addition to the WebSphere cluster, have been configured using IBM's multi-processor feature, along with IBM's High Availability (HA) option and Storage Area Networking (SAN) technology. The combination of these three features, coupled with exceptional system monitoring

and performance tools, enabled ValueOptions to build a website environment that handles a capacity of six million users and their associated transitions. When needed, the storage and processing capacity for the Military OneSource EAP Services website can be dynamically increased simply by adding processors and storage to the cluster. As a global EAP and Work/Life company that creates innovative solutions, we have successfully used this design to deploy Web technology platforms that currently supports over 32 million active members.

The IBM WebSphere Performance Pack contains website infrastructure software that addresses the scalability, reliability and performance needs of high volume, and high transaction websites, such as Military OneSource. We have incorporated the following component features into our overall website management and optimization process:

- **Dynamic Load Balancing** using IBM SecureWay Network Dispatcher (ND) to automatically distribute Military OneSource website user session requests across multiple servers in the cluster. This ensures Military OneSource website availability.
- **Content Replication and Distribution Management** using IBM AFS Enterprise File System to support automatic replication of Military OneSource EAP Services website content at the secondary hot site location.
- **Bandwidth Management** using IBM Web Traffic Express provides the website with highly scalable content caching and filtering to effectively manage the functions associated with receiving user requests. This enables the website to support high cache hit rates and quick response times.

99 Percent Online and Uptime Availability

We have established service level standards, which target 100 percent system availability, while performing testing and maintenance in our parallel, non-production environment. To achieve these performance targets, mitigate risk to users and reduce system downtime, ValueOptions only schedules routine maintenance, system promotions and website upgrades during off-peak, non-business hours.

Additionally, topical content presented on the Military OneSource website and the website structure is available in Spanish as well as English. Upon entering the Military OneSource website, users are presented with the option to view the site in English or Spanish. Once a choice is made, the user is redirected to the language version that corresponds to their choice. All topical content will be presented in forms that are readable online, as well as available in a downloadable format, such as information sheets and booklets. Additionally, users will also be able to request downloadable content in English or Spanish.

MOS EAP WEBSITE (ACHIEVE SOLUTIONS)

Military OneSource Service Members and family members also have access to a wealth of content and locator tools to assist in finding services. A screenshot of the Military OneSource EAP services website homepage is shown below. Achieve Solutions uses drop down menus that presents the Member with multiple locator options such as:

- **Childhood Services:**
  - ➢ Adoption Assisted Search
  - ➢ Adoption Provider Locator
  - ➢ Child Care Provider Locator

- ➢ ~~Child Care Assisted search~~
  - ➢ Find Tutoring Help
- **Elder Care Services:**
  - ➢ Adult Care Services locator
  - ➢ Adult Care Assisted Search
- **Schools and Camps:**
  - ➢ Education Assisted Search
  - ➢ Camp Locators
  - ➢ College Locator
- **Community Services:**
  - ➢ Child and Family Help Lines
  - ➢ Consumer Protection Offices
  - ➢ DisabilityResources.org
  - ➢ US Administration on Aging's Eldercare Locator
  - ➢ Hospital Compare Tool
  - ➢ MyMedicare
  - ➢ National Domestic Violence Hotline
  - ➢ Social Security Office and Other Public Assistance Agencies Locator
  - ➢ Your Personal Assistant
  - ➢ Better Business Bureau

Military OneSource EAP services website homepage

The Military OneSource EAP Services website presents a unique feature in its self assessment structure where the tailored content can be pushed to users based on their responses. Service Members also have access to self-assessment tools and quizzes for employment issues, and calculators to assist Military OneSource Members with loans, mortgages, and other financial transactions. For example, a Service Member completing an employment skills assessment can be directed to employment skills assistance content if the self assessment score falls above or below a predetermined range.
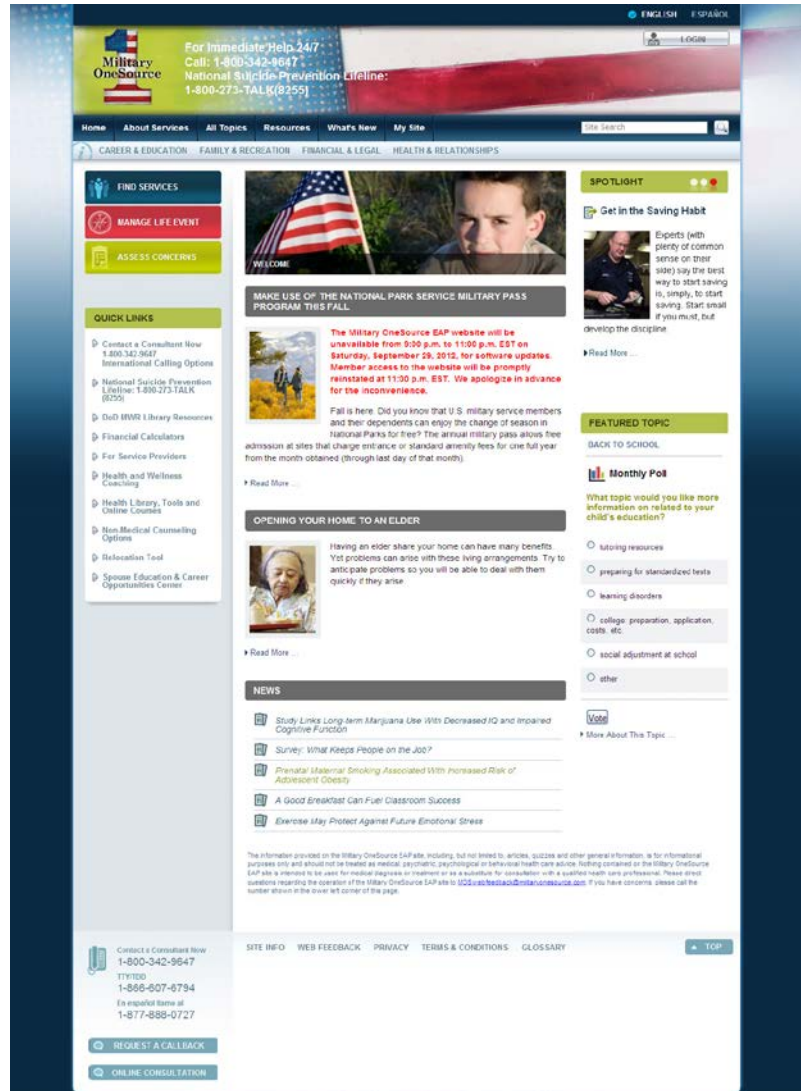
PWS 4.2.1.2 SECURE LOGIN CAPABILITY

As previously described in **Section 4.2.1.1**, ValueOptions designed the Military OneSource EAP Services with a secure login capability. Upon establishing a user ID and password through the registration process, users may enter the secure, password-protected area of the Military OneSource EAP Services website to gain access to the Military OneSource EAP Service applications, tools and resources.

PWS 4.2.1.3 FULLY COMPLIANT WITH SECTION 508

The ValueOptions Team subscribes to the W3C industry best practice standards for website accessibility. The benefit of following public website development standards is that they make our websites accessible to the greatest number of people. In particular, the W3C website accessibility standards adopted by The ValueOptions Team enabled us to more readily design, deploy, and update the Military OneSource website, while ensuring that it can be easily accessed by persons with disabilities. The ValueOptions Team Program Director, with the assistance of the Military OneSource Webmaster, ensures the Military OneSource website is fully compliant with Section 508 of the Workforce Investment Act of 1998. To accomplish this task, the Military OneSource Webmaster:

- tests the Military OneSource website for 508 compliance using Ramp Ascend, our automated Section 508 compliance assessment tool
- identifies areas on the website where Section 508 compliance has not been achieved
- develops a remediation plan to correct the non-compliant website content
- executes the remediation plan and make the necessary website adjustments to bring the website into compliance
- re-tests the website using the Ramp Ascend tool and documents the results of the corrective actions in our monthly performance report

PWS 4.2.1.4 PROVIDE MILITARY ONESOURCE EAP SERVICES ON A CONTINUOUS BASIS

ValueOptions' team has incorporated redundancy into every layer of the Military OneSource infrastructure for EAP service delivery, including redundant Web server processors, servers and server clusters, network switches, routers and UPS, plus redundant, high bandwidth Internet circuits in the data centers, load balancing to route website traffic to different servers to spread the application processing, and full website failover to a redundant Hot Site in the event of emergency.

Network Access Control. Within our information systems, there are two levels of access: 1) Security access via the local area network and 2) Security accesses to the mainframe system (UNIX and OS/400 level security). Each employee has a confidential password. We automatically terminate system access to anyone with a log-on that has not been used for 45 days. In addition, the system prompts users to change passwords every eight weeks. If there are any unauthorized attempts to access the system, these are recorded and followed up on immediately. The system administrator is alerted by the system of the location of an unsuccessful log-on. This could be an attempt to log-on using a legitimate log-on ID or an illegitimate ID. Access to files is restricted by a security system that allows individuals to access only specific programs. Further, system users do not have access to data files except through these controlled programs. A security monitoring application sits between all applications and the OS400 file system. Any access to any data by any user, from any application is recorded in an audit file. The audit file is reviewed on a daily basis.

Physical Access Control. All ValueOptions facilities and call centers use physical access control to secure office buildings and monitor workspaces. Military OneSource systems and call center facilities will be monitored 24 hours a day, seven days a week by both outsourced security and internal operations staff. Mission critical systems and valuable building resources are continuously checked for life-

threatening situations, like fires and panic alarms, and business continuity. Key features include 24 hour, seven day a week monitoring and support, card readers and electric locks, perimeter door monitoring, and life safety and fire detection/suppression.

Intrusion Detection System (IS/IDS) and Virus Protection.
We utilize a third party product by NetIQ called PentaSafe for host IDS on OS/400 systems. PentaSafe Remote Request Management monitors exit points and controls remote access to the iSeries system. PentaSafe utilities also automatically alert security and systems administrators when specified security events occur.

eEye Blink Professional Edition is used for host based IPS/IDS for host security and protection on Windows servers. eEye Blink provides protection where a vendor has not yet created signatures or patches to protect against vulnerabilities in their operating system or application. Blink Server blocks zero-day attacks that bypass traditional signature-based solutions, protecting critical servers and their data.

In addition to the IDS solutions, we also utilize Symantec Enterprise Anti-Virus Protection Symantec Anti-Virus Corporate Edition provides scalable, cross-platform virus throughout the ValueOptions Team. Key features of the solution include:

- advanced, enterprise-wide virus protection
- outbound email worm heuristics prevent client systems from spreading worms via e-mail
- internet e-mail attachment scanning of incoming emails delivered through POP3 mail clients such as Microsoft Outlook, Eudora, and Netscape Mail
- store and forward alerts which ensure that machines not connected to the network store and forward event data to administrators after reconnecting to the network

Symantec System Center enables centralized configuration, deployment and policy management, and allows administrators to audit the network to determine which nodes are vulnerable to virus attacks. Our network administrators manage client and server groups logically, and have established security policies and settings to keep systems up-to-date and properly configured.

PWS 4.3 MINIMUM REQUIREMENTS APPLICABLE TO BOTH MILITARY ONESOURCE CALL CENTER AND ONLINE SERVICES

PWS 4.3.1 PROVIDE ACCESS TO TELEPHONE AND INTERNET

Military OneSource EAP Services Website and Military OneSource Call Center. The ValueOptions Team follows our procedures outlined in **Section 4.2.1.3** to ensure the Military OneSource Call Centers and EAP Services website fully comply with the standards established in Section 508 of the US Rehabilitation Act.

PWS 4.3.2 PROVIDE SECURITY TO PROTECT DATA

As a provider and coordinator of EAP and Work-Life services throughout the US, ValueOptions is extremely sensitive to the need to ensure and maintain confidentiality, integrity and availability of data in accordance with all applicable laws, regulation and best practice guidelines developed by IBM for

data protection within a DB2 environment. Our system architecture includes security controls and protections features to maintain the confidentiality, integrity and availability of data at multiple levels within our system environment. We have implemented discretionary access controls at the operating system level to prevent unauthorized users from accessing our systems, application layer security controls to restrict user access to their job-related functions and data within specific applications; and database and records level controls to restrict access to certain database and records within databases from unauthorized disclosure or access.

Our operational policies, protocols and technical solutions stress our commitment and belief that confidentiality and security are paramount to our ability to meet the operational requirements of the Military OneSource program. Our secure, integrated CONNECTS application platform enforces ValueOptions' confidentiality protocol by storing all Military OneSource Service Member information in trusted database environment. The system unifies all administrative functions, from invoice to clinical and intake data to referral data and benefits, and will be accessible via secure sign-on. Our system security protocols maintain all data related to individual system users and defines the level of access they are permitted across all applications based on their job functions. Our National Security Team maintains all protocols surrounding system access to support Service Member privacy and confidentiality, such as:

- maintaining clear procedures for requesting and authorizing system access requests
- maintaining role-based security, restricting employee access based on their job responsibilities
- establishing system security protocols to detect, prevent, and report any virus, network intrusion as well as support efforts related to disaster recovery and contingency planning;
- securing transmissions between CONNECTS and external constituencies
- managing a secure e-mail product for communications with clients, customers, and providers

Over the past seven years, ValueOptions subjected our computing platform and MIS operating processes to independent, SAS 70, Type II, SOC I & II audits on an annual basis to review and test our system processes and controls to meet the applicable Federal Laws, regulations and policies. As a result of the independent audit and certification, the Military OneSource program can be assured that:

- ValueOptions' internal controls over processes, infrastructure and applications have been reviewed and deemed effective by an independent third party.
- ValueOptions has established internal controls that are operating effectively.
- The Military OneSource program can have insight into the nature of ValueOptions' internal MIS processes and controls and an independent party's assessment of their effectiveness.

PWS 4.3.3 DATA COLLECTION, STORAGE AND PROTECTION

Managing and addressing security, confidentiality, integrity, availability and privacy issues are at the heart of ValueOptions' Compliance and IT Security department's responsibilities. We have worked collaboratively with the government to make sure that our information systems, security practices and procedures are current and in compliance with all legal, contractual and legislative requirements including specific DoD level Information and Security guidelines, as well as federal laws and regulations such as the Privacy Act, Drug Abuse Act.

Security Training and Orientation. In order to remain compliant with current privacy legislation, all ValueOptions employees and on-site contractor personnel are required to complete our on-line Privacy Awareness and Security training during new hire orientation and on an annual basis. This training provides each employee with:

- a clear understanding of the Privacy Act and the Security Rules
- an understanding of how security impacts their daily work activities
- at the end of each training module, staff must complete and pass a test of the information covered in the training. Staff must submit a copy of the training certificates to their supervisor, who must sign and submit the certifications to Human Resources for the employees file

Security Management. Security policy and procedures are controlled by the IT Security Official (ITSO) and or his/her formally designated alternate. A formal request for computer access must be submitted and approved before a user can access any system. Each request must be approved and signed by the user's manager. Access to information systems is determined on a need to know basis and is compartmentalized by job category. Access granted is limited to predefined system platforms (hardware/software), application software, screens, programs, files, and data. The ITSO reviews each request for compliance with submission requirements and authority level. If approved, security is set up for the user. The ITSO is the final approving authority. The Human Resource Department notifies the ITSO when an employee terminates and the ITSO initiates action to disable immediately the user's security accesses to all systems.

Security Controls. ValueOptions performs a variety of functions to ensure the protection and integrity of the client data stored in our CONNECTS applications. For example, we maintain and systematically update a master file of all enrollment information in CONNECTS using our built-in eligibility module, EligibilityConnect. EligibilityConnect also has the ability to assign a Military OneSource Service Member identification number.

Our security subsystem, SecurityConnect, provides for the maintenance of the application and user system security. The SecurityConnect database consists of the Security Master containing all users along with an Application Master containing all available systems and applications. The core of the system is in the definition of the users and applications to where access and processing is to be controlled. The system administrator will typically be assigned the responsibility of establishing the departments, users, and cross-referencing to the applications for processing. SecurityConnect protects the confidentiality and integrity of data. ValueOptions' Compliance Department constantly monitors all government legislative activity to confirm the company is aware of any new developing requirements and to ensure compliance with all applicable laws and regulations. Through this confidential and secure system, Triage Specialists and EAP Counselors have access to Military OneSource client information using the CONNECTS applications and functions as described in detail above.

PWS 4.3.4 24X7 CALL CENTER

We have established a Military OneSource dedicated, 24 hour a day, seven day a week call center operations in support of CONUS and OCONUS calls, as described earlier in **Section 4.1**

PWS 4.3.5 INTEGRATE THE CASE MANAGEMENT SYSTEM

As previously demonstrated through our response in **Sections 4.2 and 4.2.1**, ValueOptions dynamic technical infrastructure fully integrates with our CONNECTS EAP platform, and case management system, as well as the Military OneSource website. Military OneSource support staff leverage the automated CONNECTS customer service module, ServiceConnect, to assist Service Members in obtaining optimal service. ServiceConnect streamlines the Military OneSource Consultants' administrative processes and allows them to focus instead on serving Service Members.

The Military OneSource Call Centers provide authorized staff access to the CONNECTS EAP platform and other system resources, through the secure Call Center Local Area Network (LAN). As depicted below, the secure Call Center LAN includes network hardware, software, and communications components that support all Call Center operations.

Through the Military OneSource EAP Services website, Service Members are also able to initiate services with a Military OneSource Consultant, request Work/Life referrals, or identify service providers, such as plumbers or pet-sitters. Fully integrated with our telephonic platform, Military OneSource Service Members who engage in telephonic counseling or coaching will also have a more personalized online experience in which their counselor will post content relevant to the specific user, post updates and messages, and facilitate secure e-mail communication. Through each service-specific portal, participants can sign up to receive regular newsletters that will contain valuable information about the benefits of the Military OneSource program and service-specific educational materials. The objective will be to continuously share helpful information, but to also remain visible to Military OneSource Service Members. The graphic on the following page illustrates the integration of the case management system with call center and Web operations.

Website, Case Management System and Call Center Integration
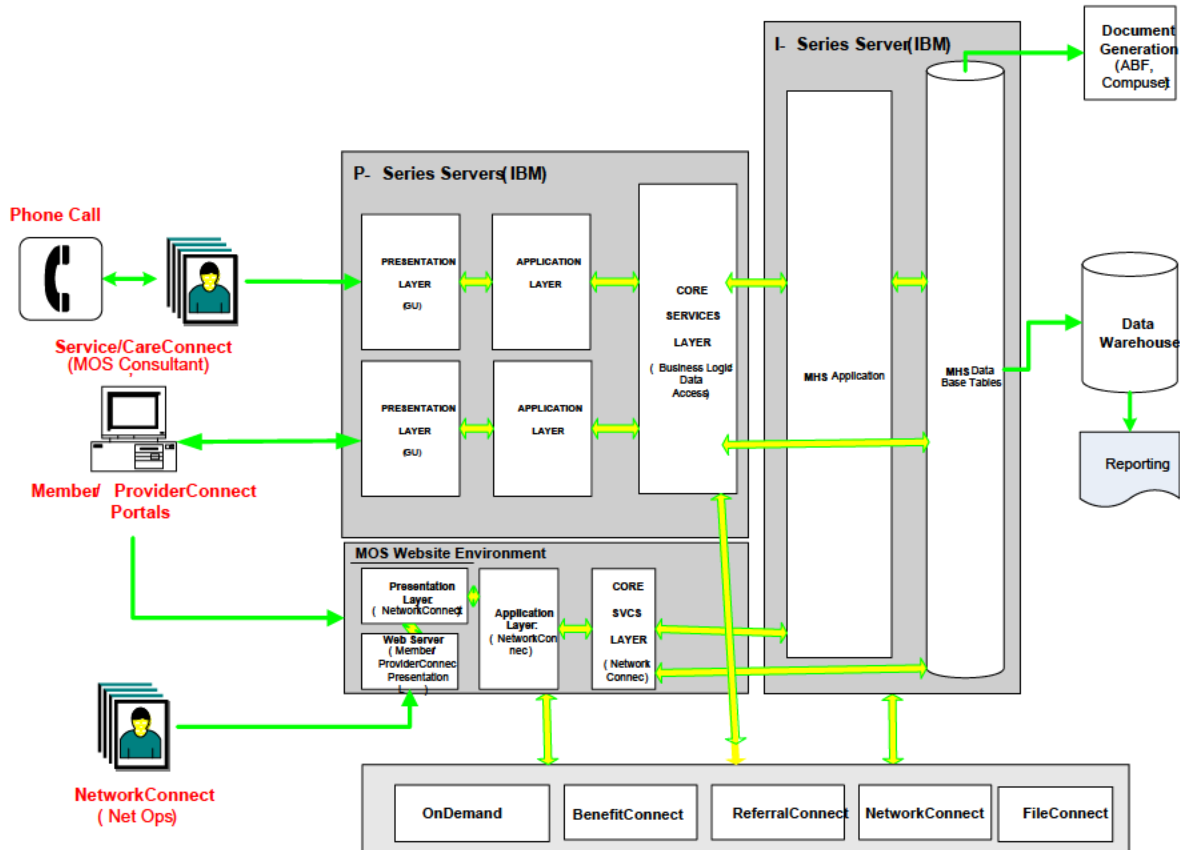
PWS 4.3.6 INTEGRATES INTO REPORTING SYSTEM

ValueOptions technical infrastructure fully integrates with the call center to collect data and comply with the reporting requirements, as described earlier in **Section 4.1.1.6**.

PWS 4.4 INFORMATION TECHNOLOGY (IT) AND INFORMATION ASSURANCE (IA) SERVICES

PWS 4.4.1 TELEPHONE INTERPRETER/TRANSLATORS

Language interpretation/translation services are provided for more than 150 170 languages. Each Military OneSource program interpreter is fluent in various languages, has keen cognitive memory skills, and excellent customer service skills. They are trained to field a variety of calls, and they must also pass rigid internal certification programs, along with routine monitoring and evaluations. When language interpretation services are required, the Military OneSource Consultant uses our telephone system to initiate a three-way conference call with the Participant and an interpreter fluent in the language requested.

Our Call Centers have TDD/TYY, enabling our Military OneSource Triage Consultants and counselors to communicate with members wherever they are, stateside or around the world, who have TTY/TDD in

their homes or workplaces. We also provide a TDD relay service, enabling those who are deaf, hard of hearing, or speech impaired to communicate with a hearing person using a standard telephone. Communications Assistants facilitate conversations by speaking or typing information, thereby enabling TTY and non-TTY users to converse. The caller connects a TDD to a standard phone line and then dials the relay service. A Communications Assistant reads the caller's typed text aloud to our Military OneSource team member and then types the reply to the TDD user. Participants can use the relay service at no charge, 24 hours a day. The Federal Relay Service Agency also provides access to Telecommunications Relay Service throughout the country.

PWS 4.4.2 IA SUPPORT

ValueOptions has dedicated Information Assurance staff resources for the Military OneSource program, as outlined in **Section 4.4.2** of the PWS.

PWS 4.4.3 IA REQUIREMENTS AND DOD 8500 SERIES OF INSTRUCTIONS

Each of our Military OneSource support systems operates according to DoD Directives 8500.1, DoD Instructions 8500.2, 8570.01, and applicable DISA Secure Technical Implementation Guidance (STIGs) and, our personnel working on the contract meet or exceed all government security requirements. Our trained staff performs timely system deployment compliance with DoD Information Assurance Vulnerability Alerts (IAVA), while immediately responding to all DoD Alerts and IA threats against Military OneSource.

Our team has successfully coordinated all Military OneSource IA and STIG compliance activities with designated representatives from the Military Community and Family Policy (MC&FP) Office of Strategic Communication and Outreach. We have implemented all STIG requirements, IA controls, and Designated Accrediting Authority (DAA) guidance, and verified them in the monthly POA&M tracking report we submit to the Government IAM and DAA.

Our team subscribes to the Information Assurance Vulnerability Alert (IAVA) system for alerts and announcements about computer application software and operating system vulnerabilities identified by DoD-CERT. We also coordinate the scheduling and remediation of IAVA-related activity with the Government's IAM and, document corrective action outcomes in the monthly IA report submitted to the Military OneSource Program Office, Military OneSource CO, and COTR.

PWS 4.4.4 DIACAP

As the program administrator during the past year, we have demonstrated that the design, deployment and management of our IT solutions are in full compliance with Defense Information Systems Agency (DISA), DoD, National Institute of Standards and Technology (NIST), and Department of Homeland Security (DHS) requirements.

> We achieved IATO within 80 days, and submitted our DIACAP-compliant C&A package for the full ATO 165 days after that.

We support all aspects of the Military OneSource Certification and Accreditation process by implementing security practices in compliance with the DoD Information Assurance Certification and

Accreditation Process (DIACAP), providing all necessary security artifacts (SIP, DIP, POA&M, Artifacts), validations and applicable updates that the Government mandates for Military OneSource. We are experienced and well equipped to develop DIACAP-compliant Certification and Accreditation packages on all contractor systems at the MAC III and confidentiality level of Sensitive as outlined in the DoD Instruction 8500.2 "Information Assurance Implementation".

ValueOptions successfully demonstrated our knowledge and ability to comply with all government requirements and achieve an Interim Authority to Operate (IATO) within 120 days of contract award. We will apply that same level of dedication to creating C&A packages for all systems and applications requiring DIACAP certification that we use to support the Military OneSource program. We will provide consultative support and oversight of our subcontractors to ensure full compliance with all DIACAP-related requirements:

- DIACAP Compliance Support – A survey to ascertain level of knowledge and current capability of the subcontractor to demonstrate the ability to comply
- DIACAP Readiness Assessment – Comprehensive support such as hands on applications/ systems testing and development of draft DIACAP C&A documents formatted according to DoD standards.

We will apply our knowledge and lessons learned to ensure the accurate, timely, and complete development and submission of the required documentation for all systems under our control that support the Military OneSource EAP Services program. As recommended by the Military OneSource IAM, we continue to use the I-Assure tool to document and track our activities involved in creation of the C&A package documents and artifacts.

PWS 4.4.5 PERSONNEL

All members of ValueOptions' Military OneSource IT security team maintain certifications and training that comply with requirements of DoDD 8570.01. We will continue to use this same team of highly qualified professionals, who have a combined total of 52 years of experience. They are experts in information system security, and hold professional certifications such as Certified Information System Auditor (CISA), Certified Information Security Manager (CISM), Certified Information System Security Professional (CISSP), Security+, NSA-IAM, CNSSI 4011 and CNSSI 4012.

PWS 4.4.6 DISA STIGS

We have successfully coordinated Military OneSource IA and STIG compliance activities with representatives from the MC&FP Office of Strategic Communication and Outreach. We have implemented all STIG requirements, IA controls, and Designated Accrediting Authority (DAA) guidance, and verified them in the monthly POA&M tracking report we submit to the Government IAM and DAA. Our team subscribes to the Information Assurance Vulnerability Alert (IAVA) system for alerts and announcements about computer application software and operating system vulnerabilities identified by DoD-CERT. We coordinate scheduling and remediation of IAVA-related activity with the Government's IAM and document corrective action outcomes monthly in the IA report submitted to the Military OneSource Program Office, Military OneSource CO and COR.

PWS 4.4.7 DISASTER RECOVERY PLANNING

ValueOptions' Disaster Recovery Plan and program ensures 24/7 accessibility and operation of all Military OneSource managed services and toll free telephone number. Our team's ability to maintain operations under earthquake and severe weather conditions was proven in October 2011 and May 2012. During those events, we successfully switched the entire Military OneSource Data Center operation, including the Case Management System, EAP Website, Call Center Operation, and all inbound telephonic traffic to the fail-over location within the current contract's specified four hour RTO.

The Military OneSource disaster recovery test plan includes a recovery procedure for each core business application. It is built, tested, and maintained through a licensed copy of SunGard's Living Disaster Recovery Planning System (LDRPS 10). That enables us to draft and maintain both standalone and unified recovery plans, which includes tabletop exercises that leverage the LDRPS Dependency Map. The map provides a graphic

> The most recent live test of our Military OneSource Disaster Recovery Plan and site fail-over was successfully tested, documented, and completed on May 30, 2012.

representation of plan relationships across the various departments and application system platforms. Test scenarios include Hardware Failure (servers, storage, processors), Telecommunication Failure (circuit loss, network switch overload, router failure), Power Failure (server power supplies, utility grid failure, UPS test, stand-by generator cut-over), Data Restoration (CONNECTS application suite, website content recovery) and Hot site Failover. Our disaster recovery plans are executed and tested twice each year, and tabletop simulations tests are performed quarterly.

We continually update and test our recovery plans to accommodate ongoing changes and improvements to our technology infrastructure. Core elements of our business continuity and disaster recovery plans are "*High availability of onsite disaster recovery services and automated disaster recovery tools; Comprehensive daily, weekly, monthly, and annual backup and recovery services; National data center hosting safeguards; Telecommunication systems business continuity services and, Systems availability, service levels, and performance statistics*".

Redundancy. ValueOptions' team has incorporated redundancy into every layer of the Military OneSource infrastructure for EAP service delivery, including redundant Web server processors, servers and server clusters, network switches, routers and UPS, plus redundant, high bandwidth Internet circuits in the data centers, load balancing to route website traffic to different servers to spread the application processing, and full website failover to a redundant Hot Site in the event of emergency.

Preventing Loss of Call Center Services. We use the Sungard LDRPS to develop, document, test, and implement specific protocols used for Military OneSource Call Center system recovery. With LDRPS, ValueOptions Military OneSource team builds plans for technology and critical application recovery, process or departmental recovery, and call center site event management; leverages call center operation best practices and methodology into plan construction based on business continuity and disaster recovery knowledge of call center industry experts and ValueOptions' own experienced call center operations and management staffs. LDRPS also enables our team to customize Military OneSource-specific plan features (such as contract terms and process screens) that meet Government RTO requirements and operational business needs.

Return to Operation of Website. We test the website plan four times a year. We simulate a full site restoration from our backup, and test automatic fail-over to the hot site operation. When developing the fail-over strategy, ValueOptions' team used the following performance parameters for configuration of the host site design:

- We incorporated the Website Disaster Recovery procedure as part of our overall disaster recovery plan for the entire Military OneSource program operation. ValueOptions' technical staff at our Reston hosting facility performs full daily backups of all production systems, including the Military OneSource EAP website and associated applications.
- We established a geographically dispersed secondary data center in Richardson, Texas, with the technical expertise and infrastructure to support the continuity of operation for the Military OneSource EAP website.

All transactions of the Military OneSource EAP website are replicated in real time to a fully redundant IBM iSeries application server that uses third-party data replication software. This allows our team to cut over to our Hot Site backup infrastructure immediately. The diagram below depicts how our Hot Site Fail-over works:

Hot Site Fail-Over Process
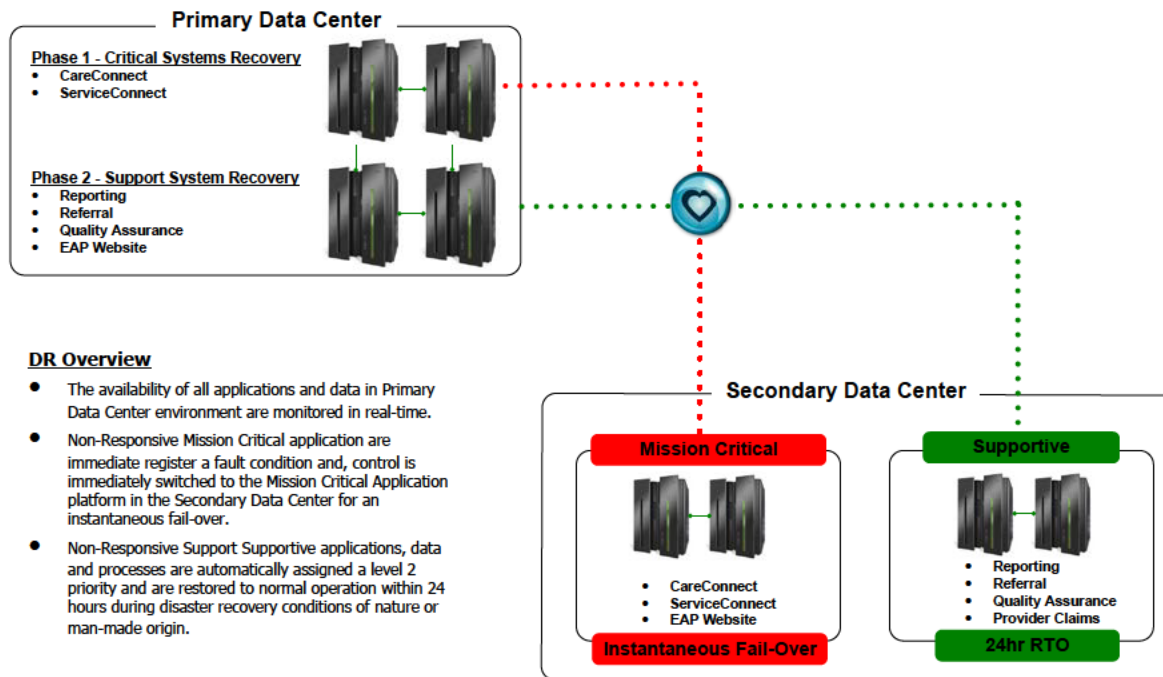
We have deployed a mirror image of our telephone system, including peripheral services, in a hosted, premier data center in Richardson, Texas. If there is a problem in Reston, all inbound calls will be automatically routed through Richardson, Texas, where our redundant, mirror image telephony architecture automatically assumes call management functions.

The telecommunication system for each Military OneSource call center is pre-configured to automatically reroute calls if there are partial voice trunk outages. We seamlessly and instantaneously reroute blocked call traffic using our Network Call Redirect service. Our long distance vendor automatic reroutes toll-free traffic when our system rings busy or there is a 'ring no answer.' The process is completely transparent to the Military OneSource service recipient and there is no down time. We have also implemented the Single Image Switch architecture to leverage Avaya platform capabilities. In case of disaster at the Arlington, Virginia, location, our Chesapeake call center can continue in stand-alone mode without service disruption. In the event of loss of a physical facility, we have a mirror image of our Avaya architecture and platform in a secure data center located in Richardson, Texas.

It is maintained in hot-standby mode and continuously auto-synchronizes to the telecommunications system, enabling us to meet our RTO five second requirement and operational business needs. We execute and test our recovery plans twice each year and our tabletop simulations quarterly. The most recent, full test was successfully performed in May 2012.

The effectiveness of our disaster recovery planning and execution has been proven and witnessed recently by MC&FP personnel and Military OneSource Members earlier this year. The devastating storms, deadly lightning strikes, high winds, power losses and excessive heat in the National Capital Region forced the closing of our Arlington, Virginia Call Center under the current Military OneSource program. However, due to the redundant design of our Call Centers and the execution of our disaster recovery plan, employees who called the Arlington Call Center were routed to other call centers and continued to receive services. Our recovery planning, redundant technical architecture component design, and situation management enabled us to quickly activate our recovery protocol, maintaining continuity of services for Military OneSource families with minimal disruption in service and no loss of data.

Our technical architecture design and approach to business continuity have enabled us to maintain a 99.8 percent uptime rating for our Call Center telephony platform throughout the current Military OneSource contract. Our approach promotes minimal disruption of service when a call center experiences unusually high call volume, a disaster, or a temporary closure. While such incidents are rare, it is vital to maintain a detailed plan so that all staff can decisively respond to any incidents. Each call center maintains plans for call rerouting when required.

> Our infrastructure design and business continuity approach have enabled ValueOptions' Military OneSource Call Center telephony platform to maintain a 99.8 percent uptime rating throughout the current contract..

ValueOptions works collaboratively with the government and provides presentations, diagrams and technical support in planning the DRP/COOP for the Military OneSource program and the areas under ValueOptions operational control.

PWS 4.5 CASE MANAGEMENT OBJECTIVE AND SECTION L17, FACTOR 1, 1.C

PWS 4.5.1 CASE MANAGEMENT SYSTEM MINIMUM REQUIREMENTS

ValueOptions uses the CareConnect module of our CONNECTS EAP application suite to support the case management requirements of the Military OneSource program, including the storage and

maintenance of client information. CONNECTS is a feature-rich, suite of Web-enabled applications that was specifically designed to reduce the administrative burden imposed on providers and care managers, allowing them to concentrate on the EAP participants rather than paperwork. The underlying IBM DB2 database structure is ODBC-compliant and DB2 data sharing improves the availability of data within the case management system environment, extends the processing capacity of our CONNECTS platform, provides more flexible ways to configure the Military OneSource computing environment, and increases transaction rates to enable the ValueOptions Team to support more users. Data entered in this ODBC compliant system is accessible automatically throughout the system and across all application objects on the database. The CONNECTS platform data repository is based on a relational database model, normalized to 3rd normal form. As a result, importing and exporting and exporting data is more reliable and easier to accomplish.

Within the CONNECTS environment, we have implemented discretionary access controls, application layer security controls, and database and records level controls to restrict access to certain information in the system to maintain the confidentiality of Service Member data. We define user profiles that allow us to share data common data amongst authorized call center consultants and counselors to speed the access to information regarding a client's previous requests for assistance, caller-identifying information and client concerns. The data collected in the CareConnect module is used to support the DoD reporting requirements of the Military OneSource program, in addition to being aggregated with other data elements within KnowledgeConnect to support complex and detailed data analysis tasks.

PWS 4.5.1.1 MAINTAINING CLIENT CONFIDENTIALITY

ValueOptions uses our CareConnect case management module to perform the case management functions in support of the Military OneSource program. CareConnect enables Military OneSource Consultants to easily locate and view historical data summaries to efficiently formulate cases, as well as house advanced tools that allow Military OneSource Consultants to devise, monitor, follow up, and report on individualized EAP services for the Service Members they serve. CareConnect functionality includes:

- creating referrals (routine, urgent, emergent)
- completing and tracking request for services

To assure Service Member confidentiality and to provide Military OneSource Consultants easy access to information, our Web-based systems have the ability to restrict access to Service Member information based upon the use of an imbedded access authorization security feature. This imbedded feature permits us to grant controlled access to authorized individuals in the call center to enable them to access pertinent information regarding a Service Member's previous requests for assistance, caller-identifying information, Service Member concerns, and the history of support provided to the client by using the case notes feature CareConnect. All data entered is accessible automatically throughout the system and across all application objects on the database. Our shared database architecture allows us to share common data amongst authorized Military OneSource Consultants and counselors to speed the access to information regarding a client's previous requests for assistance, caller-identifying information and Service Member concerns. In addition to the features described above, within CareConnect clients also have the option of requesting the assignment of a specific Case Manager, Counselor or Consultants to their case, whenever possible.

Our clients' confidentiality remains among our most critical priorities. To ensure that all client and member information remains private, we have dedicated and thoroughly qualified Information Assurance (IA) staff members that ensures appropriate day-to-day management and oversight of all security related aspects of the environment, as well as direct daily tasks and provide second-level assurance of appropriate security review of established procedures and event management. These individuals also interface with other technical and non-technical management-level staffs to ensure established security policies and system change assessments are followed.

The IA staff members execute tasks related to event log management, user access management system audits and system configuration, as assigned by the Information Security Manager. Together, these two vital staff members will provide comprehensive oversight of all information systems.

PWS 4.5.1.2 POPULATING AN ON-LINE DATABASE

Our case management system fully supports the government requirement for auto-population of an on-line database of usage through the use of our CONNECTS EAP platform. This feature-rich, suite of integrated, Web-enabled suite of integrated application ensures instantaneous access to real-time comprehensive program information and eliminates the need for duplicative data entry by sharing common data elements between application modules and screens. Additionally we use Database Journaling to provide a facility for capturing changes to data files within the CONNECTS EAP platform environment. We take before and after image snapshots of data records for any record that is changed.

In addition, our CareConnect case management system is the primary repository for capturing and storing detailed information regarding service utilization. It fully supports the government requirement for auto-population of an online database of usage. We use our case management system to capture all pertinent information regarding telephonic, e-mail and face-to-face interactions with Military OneSource Members; service requests and inquiries; Members contact and demographic information; provider referral histories; service authorization data, non-medical counseling and request history; service utilization and provider invoice history information; and key Member data elements (e.g., military service installation and military branch affiliation). All interaction with Members (whether user-initiated or system generated) that modifies data in the case management system is automatically replicated and stored in our KnowledgeConnect management system. The data then can be further analyzed including comprehensive reporting and analysis of patterns related to service usage, early detection of over and under utilization trends; defining the requirements for more effective intervention programs; expansion of counseling services needs, reducing the level of crisis intervention incidents; identifying provider network expansion needs; and refinement of Key Performance Indicators.

PWS 4.5.1.3 COMPLIANT WITH PRIVACY ACT

Access to ValueOptions' CareConnect Case Management system is granted only after a proper electronic security access request is reviewed and approved by our Information Security Manager. Our IT system includes role-based security, which allows staff access only to selected functions based on their job requirements.

The IT staff developed the logic required to map role-based access to specific human resource department job titles. Proper security configurations were then added to the CONNECTS application

security screens. The Security Plan addresses operations security environment concerns on a wide range of topics such as virus protection, intrusion detection, incident reporting and response, disaster recovery and contingency planning and network security firewalls. Because we develop and maintain our own software applications, security concerns regarding the system life cycle and configuration management are addressed. Transactions and queries submitted by providers and the government are conducted via a secure Internet connection.

All transactions that modify data in the CONNECTS system are date stamped and identify the user performing the modification. Data integrity is controlled on three levels: error prevention, ongoing monitoring, and active auditing. Error prevention is ensured by having adequate data edits and logic checks, as well as by setting pre-editing standards for entities, internal (e.g., direct line staff) and external (e.g., providers), that provide the data. Ongoing monitoring tracks the consistency and validity of the data and resolves discrepancies resulting from the receipt of data from multiple sources. Periodic auditing ensures that the data are not just reasonable or logically possible but are, in fact, correct. To ensure high quality processing, we perform a number of run-to-run balancing routines on the processing system.

ValueOptions has established a comprehensive training and awareness program to ensure 100% compliance with the provisions of the Privacy Act of 1974, as amended, 5 U.S.C. 552a, Public Law (Pub.L.) 93-579. All ValueOptions employees and contractors supporting Military OneSource that are authorized to use the case management system have been trained on the compliance requirements that govern the collection, maintenance, use, and dissemination of personally identifiable information. Personally identifiable information stored in our systems will not be shared with vendors or other agents, companies or services without permission of the Military OneSource Member and his or her family.

Assures Confidentiality

CareConnect assures confidentiality by utilizing an active access control function that tightly manages access to varying hierarchical levels of system functions and information. To assure Service Member confidentiality while providing counselors easy access to information in the common data record, history files and case notes, the need for Service Members to repeat basic information such as name, telephone number and zip code on subsequent calls is eliminated. Our Web-based systems have the ability to restrict access to client information based upon the use of an imbedded access authorization security feature. This imbedded feature allows us to restrict to our information system and application.

This system access and control function enables us to:

- restrict access to information on a least privilege basis
- restrict access to specific system functions and information based on an individual user profile, including inquiry only capabilities and the ability to create, change or delete certain data (global access to all functions shall be restricted to specified staff
- restrict unsuccessful attempts to access system functions to three, with a system function that automatically prevents further access attempts and create an audit trail records these occurrences

Leveraging our advanced technology platform and our security model enables ValueOptions to eliminate duplicate data entry or request for duplicative information by having a centralized, integrated application platform and database that protect client confidentiality.

PWS 4.5.1.4 TRACKS DUTY TO WARN CASES

ValueOptions Military OneSource Team has collaborated with program staff to refine all our Duty to Warn processes, training resources, and reports to regularly capture incidents required by the contract and DoDI guidelines. Clinical Supervisors consult in real time with Triage Consultants on all Duty to Warn calls to ensure Member safety and connection to appropriate clinical services for the level of risk presented. The consultations ensure proper case handling and mandated reporting within 24 hours to appropriate parties, proper documentation in the CMS, assignment of clinically appropriate follow-up, and completion of the case. We have formal reporting protocols for each Service Branch and update contact information as soon as we are notified of a change.

In collaboration with the Program Office, we have refined and standardized the Duty to Warn/Mandated reporting and referral processes for the National Guard and Reserve components, which differ from those of the active forces. All Military OneSource staff received refresher training on risk rating, crisis intervention procedures, and documentation processes. We also developed a specialized tool to support this process improvement with ongoing, real-time audits of 100 percent of cases.
Our Duty to Warn actions steps are provided in the table below:

Duty to warn action steps
1. Triage Consultant receives call, and determines risk after reading the Limits of Confidentiality.
2. Triage Consultant sends an "instant message" to Military OneSource Clinical Supervisor, alerting to possible risk issue.
3. Supervisor immediately consults either face-to-face or via IM, while listening to the call.
4. Together, they evaluate the case and decide best course of action, according to risk level presented.
5. Triage Consultant ensures Member safety including police or emergency transport as needed.
6. Referrals to Tricare, MTFs, VAP, SARC, FAP and community resources, such as Domestic Violence hotlines and shelters, are provided as appropriate.
7. After connecting the caller with appropriate services, the Triage Consultant documents details in the Case Management System and referral/assessment database.
8. Triage Consultant adds Member flag, documenting any necessary follow-up.
9. Triage Consultant pends the case to clinical Supervisor then emails alert to supervisor to ensure continuity of care.
10. Supervisor reviews and documents the case.
11. Triage Consultant completes follow-up the next day OR assigns it to another consultant if the original is unavailable.
12. To assure prompt quality control monitoring, the case is audited the next business day. If the audit is below 90 percent the Clinical Supervisor meets with the Triage Consultant to discuss handling of the case to ensure job success and process improvement.
13. Documentation of any necessary coaching is tracked and reported to the Director of Non-Medical Counseling.

PWS 4.5.1.5 TRACK EMERGENT, URGENT AND ROUTINE ISSUES

CareConnect provides staff the ability to apply the appropriate risk ratings to the initial assessment of the Military OneSource Service Member. The system prioritizes the call based upon the risk rating and

automatically routes the inquiry to the Military OneSource Consultant for appropriate action and follow-up. The ValueOptions Team staff follows our risk rating policy and procedure and applies the proper Military OneSource risk rating factor as described in **Section 5.1.3**.

PWS 4.5.1.6 WEB-ENABLED AND ACCESS LEVEL SECURITY

Both our DIACAP compliant and certified case management system and EAP website employ a comprehensive security model that not only conforms to the requirements outlined in our response to this RFP, but exceeds the requirements. Our security model addresses the following critical areas:

- DoDI 8510.01 - Department of Defense Information Assurance Certification and Accreditation Process (DIACAP)
- IBM Security Implementation Guidance for i5/OS Environments
- Risk Management and Security Controls Guidance from Computer Security Institute (CSI)

The combination of these guidelines, coupled with our IT security policies, procedures and protocols has resulted in a secure computing environment. Our policies mandate Operating System, Application, and Object Level Security controls based upon well-defined user roles and profiles. We also utilize an active access control function that tightly manages access to varying hierarchical levels of system functions and information. This system access and control function enables us to:

- restrict access to information on a least privilege basis
- restrict access to specific system functions and information based on an individual user profile, including inquiry only capabilities and the ability to create, change or delete certain data
- restrict unsuccessful attempts to access system functions to three, with a system function that automatically prevents further access attempts and creates an audit trail

PWS 4.5.1.7 SCHEDULER FUNCTIONALITY

The ServiceConnect and CareConnect applications provide us the ability to schedule and track follow-up calls. The system serves as a user-friendly management system, the system prioritizes the daily follow-up calls, and serves as an electronic tickler system, which reminds Military OneSource Call Center and case management personnel when a follow-up call is required. CareConnect allows staff to document the following elements when a follow up call is required:

- date of the call
- time of the call
- the caller's name
- caller's phone number
- call back phone number
- time zone
- relationship to Service Members
- call back location (home, work, or cell phone)

Our system captures inquiry data and distributes it to the responsible individual or department for resolution. The system maintains the inquiry details throughout resolution, and keeps historical

maintenance of all inquiries for all Service Members. These inquiries can include but are not limited to referrals, document translation and complaints.

PWS 4.5.1.8 DATA SEGREGATION

In consideration of the government logical and physical data separation requirement for DoD data, ValueOptions has deployed a separate application and data processing platform for the Military OneSource program Case Management System. No other client data is processed or stored on the platform dedicated to the Military OneSource support contract.

PWS 4.6 MONTHLY REPORTING OBJECTIVE AND SECTION L17, FACTOR 1, 1.D

The ValueOptions Team provides the government with detailed monthly Military OneSource data and analysis reports outlining both program utilization and quality, enabling the government to monitor and further develop the program to address the evolving needs of the Department and Military Services.

ValueOptions has adopted and employs throughout its operations a fully-integrated approach to Business Intelligence (BI) made possible by the strategic application of various products and services supplied by Business Objects and Oracle, recognized leaders in the BI realm. The ValueOptions Team has been successful in the practical application of their products and solutions for both internal and external customers for more than 10 years. In addition to our standard management reports, the ValueOptions Team has offered the Government access to IntelligenceConnect, our reporting portal that offers a sophisticated suite of interactive dashboards and Web intelligence reports. This option remains available to the Government should they choose to implement. The picture below depicts the flow of information available through our KnowledgeConnect system.

KnowledgeConnect
Knowledge Management Environment
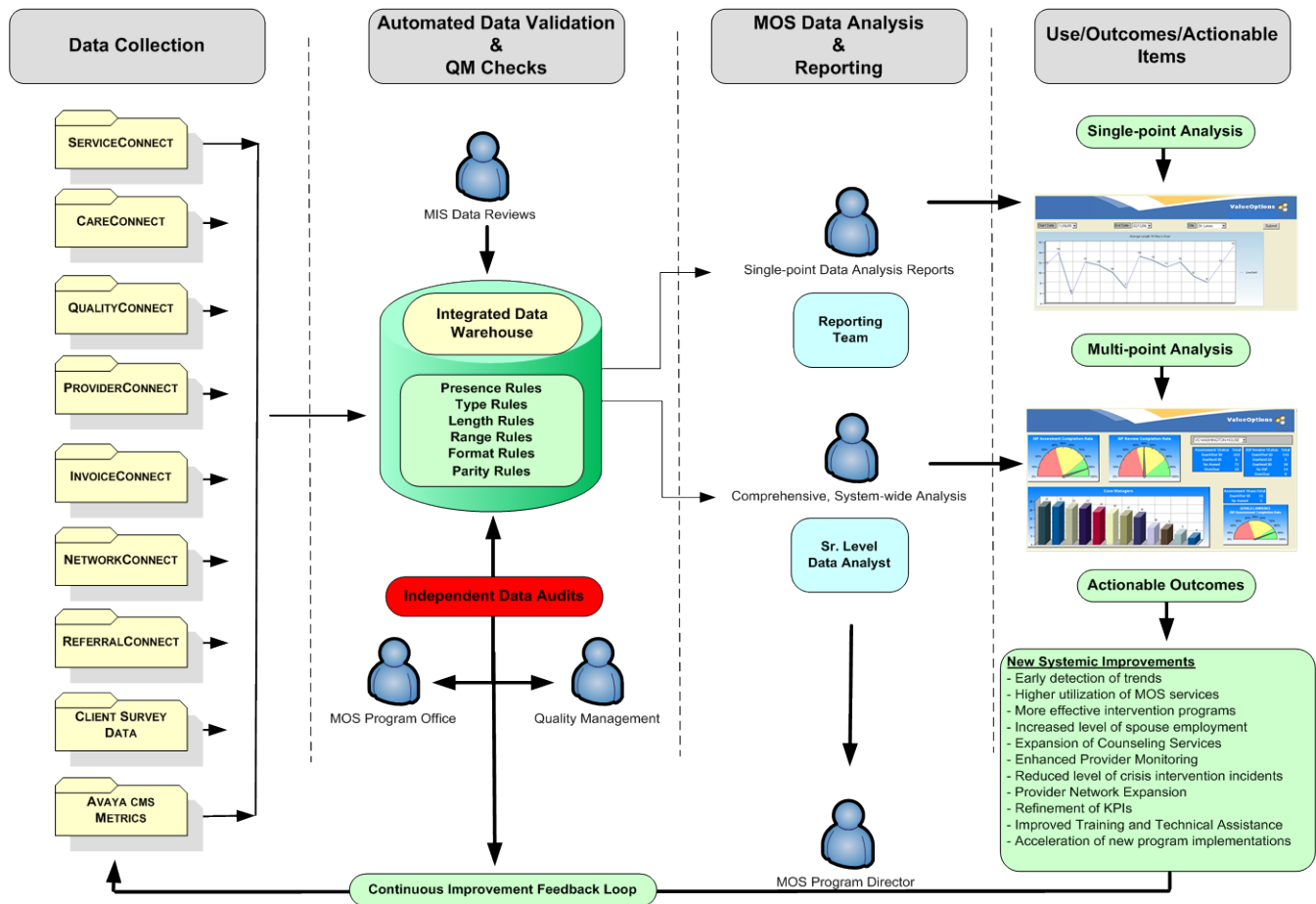
PWS 4.6.1 MINIMUM REQUIREMENTS FOR MONTHLY REPORTS

We will continue to deliver monthly contracting and financial disbursement reports to the Government by the 15th of each month and agree to continue to deliver all required reports to the Government via email in the Microsoft Word or Excel format and version specified by the COTR.

PWS 4.6.1.1 REPORT REVIEWS

The ValueOptions Team will continue to provide the Government with 10 days for review, comment, acceptance or rejection of the reports. If comments or rejections are not received from the Government, the report will be considered as an accepted deliverable and our Military OneSource Program Director will request a signature from the designated government representative to signify acceptance.

PWS 4.6.1.2 CAPTURE AND REPORT

ValueOptions will continue to use our Military OneSource-specific systems and tools to capture all pertinent information regarding contact and interactions with Service Members and family members.

Collected information will continue to contain key data elements such as Military Service installation, Service Member, or family member, to include Guard and Reserve. The Military OneSource Program Director will continue to produce the monthly report and segment the data as directed by the Government and submit the report along with a deliverable acceptance letter, per the guidelines detailed in the RFP.

PWS 4.6.1.3 REQUIRED DATA

The Military OneSource Program Director will be responsible for ensuring the development and delivery of the required data for the Monthly Progress Report in the prescribed Microsoft Word or Excel format to the Military OneSource COTR. We will use our KnowledgeConnect application to produce the required Monthly Progress Reports on the 15th of the month following contract award and on the 15th of each month thereafter throughout the period of performance. The reports will be transmitted as an email attachment by the Military OneSource Program Director to the COTR.

PWS 4.6.1.4 PROGRAM REPORT

The ValueOptions Team agrees to continue to produce and deliver to the Government a Monthly Progress Report which will contain the following:

- a narrative executive summary of work accomplished during the reporting period
- a detailed description of the problem areas or issues that have been identified during the period and resolution action taken, if any
- copies of any reports (informal and formal) that have been provided to any DoD organization during the period; individual Military Service Branch and installation reports will be prepared and submitted monthly by the Military OneSource Program Director
- a detailed report of emerging issues identified through the analysis of the data collected in our KnowledgeConnect System
- detailed recommendations for systemic improvements and programmatic interventions resulting from the analysis of data in our KnowledgeConnect System
- a recap of the information contained in the reports

PWS 4.6.1.5 FINANCIAL DISBURSEMENT REPORT

The ValueOptions Team will continue producing and providing to the Government a Monthly Financial Disbursement Report and Contract Fund Status Report segmented by CLIN/ Sub-CLIN which will include:

- amount invoices by ValueOptions for services rendered to date
- payment amount received by ValueOptions to date
- amount that has been invoiced by ValueOptions, but not paid as of the time of the report
- contract funds remaining, but not invoiced by ValueOptions

The report will also include the cumulative hours expended throughout the reporting period by job category, Staffing Status Report by Business Activity for which ValueOptions is billing the Department services to include activated on-call or on-demand activities. The Military OneSource Program Director

is overall responsible for producing, validating, and delivering the Financial Disbursement Report to the Government.

PWS 4.6.1.6 AD-HOC REPORTS

We recognize the importance of consistent, standardized and ad hoc reporting. IntelligenceConnect provides consistent reporting with more than 200 standardized reports, as well as ad hoc reporting capabilities to ensure that the business requirements of all of our customers, including MC&FP are met. KnowledgeConnect is the core System environment containing the data warehouse that receives imports from CONNECTS and other systems for reporting purposes. This data is formatted and stored as standard data in our Oracle relational database management system. An advantage of this data warehousing technique is the easy insertion of data from external sources, data from outside sources can be integrated into the data models to enhance reporting capabilities. These standard data models are used as the foundation for report generation, statistical analysis, decision support, and outcomes management. Our information systems allow us to develop hundreds of custom reports and we will create customized, ad hoc reports on any criteria necessary to support program analysis and evaluation.

PWS 4.6.1.7 ANNUAL FISCAL REPORT

The ValueOptions Team produces and provides to the Government an Annual Fiscal Report. We have worked with the Government to define the metrics and reports required by the Government to measure program performance. The Military OneSource Program Director is responsible for producing, validating and delivering the report by the agreed upon due date.

PWS 4.6.1.8 ON-CALL ON-DEMAND REPORTS

ValueOptions will continue to provide the government with on-call and on-demand reports as needed, in addition to granting access to our web-based reporting portal, IntelligenceConnect, for government use. These reports are robust, parameter driven reports that can be run on-demand. The output of the reports can range from presentation quality reports to Excel tables to Word reports.

PWS 4.7 DISASTER RECOVERY AND L17, FACTOR 1, 1.E

ValueOptions developed, implemented and maintains a dynamic Disaster Recovery Plan and program in support of the Military OneSource program and associated functions under our control to ensure 24/7 accessibility and operation of ValueOptions managed services and the Military OneSource telephone number. Our approach to disaster recovery planning for the Military OneSource program is based on lessons learned from managing 21 call centers across the US. In the event of any disaster, we minimize the disruption of operations and ensure organizational stability and facilitate an orderly recovery after a disaster. Our disaster recovery planning for the Military OneSource program includes the following:

- providing a sense of security
- minimizing risk of delays
- guaranteeing the reliability of standby systems
- providing a standard for testing the plan
- minimizing decision-making during a disaster

Throughout the remaining **subsections of 4.7**, we have detailed our procedures for mitigating risks, responding and recovering from a disaster to restore normal operations to all Military OneSource operations and systems (call centers, websites and Case Management System). The Military OneSource Consultants and website serve as the primary information sources for Service Members during emergency situations.

PWS 4.7.1 MINIMUM REQUIREMENTS FOR DISASTER CONTINUITY OF SERVICES

During any emergency situation, Service Members accessing Military OneSource will not experience any disruption in their service. Our current state-of-the-art telephony system allows us to immediately activate roll over to another call center to ensure that calls continue to be answered in a seamless manner. In response to an emergency, we immediately activate our contingency operation plan, allowing The ValueOptions Team to be operational within the Return to Operation (RTO) window agreed upon with the Government. We will remain in recovery mode of operation until the emergency situation is resolved and normal conditions are restored. To the extent that we can anticipate emergency situations, such as impending bad weather, we will prepare to shift to our emergency operations posture.

In case of a life threatening emergency, the Military OneSource Program Director will immediately make contact with the COTR to ascertain the status of any personnel who were located in Government controlled space affected by the emergency. When any disruption of normal, daily operations occur, the Program Director and COTR will promptly open an effective means of communication and verify:

- key points of contact (Government and The ValueOptions Team)
- temporary work locations (alternate staff office spaces, tele-work, virtual offices, and others)
- means of communication available under the circumstances (e.g. e-mail, Web mail, telephone, FAX, courier, and others)
- essential work products expected to continue production by priority

The Military OneSource Program Director will make use of the resources and tools available to continue Military OneSource functions to the maximum extent possible under emergency circumstances. The ValueOptions Team will obtain written approval from both the COTR and Contracting Officer and will not incur costs over and above those allowed under the terms of this contract. Regardless of contract type and work location, we will ensure that all work performed is in support of authorized tasks within the scope of the contract and will charge those hours accurately in accordance with the terms and conditions of the contract.

ValueOptions has experienced numerous natural disasters and catastrophic events without service interruptions, including weather related power outages at our Military OneSource call center. Additionally, our experience in emergency situations includes working with the DoD during hurricanes Katrina and Rita in 2005 and, during the 2008 Hurricane Season, we assisted with hurricanes Faye, Gustav, and Ike. This experience included mobilizing clinical teams to affected areas to provide coaching and counseling services to our military Service Members and their families. We have also developed a Crisis Response Plan which delineates the actions to be taken on a corporate and regional level in response to a large disaster. Our Crisis Response Team is comprised of Health & Performance Solutions personnel at each service center, including Military OneSource staff, who are all available immediately via cellular phone. The Crisis Response Plan protocol in place for disaster response

includes notification, mobilization of resources, coordination with local and federal agencies, and communications.

ValueOptions leverages state-of-the-art telephony technology, power-protected facilities and resource alignment to prevent disruption to our call centers. Our architecture features a three-tiered back-up, including fortified staffing, and operates as described in the following paragraphs.

In normal operations, calls are delivered to the National Capital Region (NCR) and Norfolk, (Chesapeake) Virginia centers based on a process contained within the Enhanced Call Routing (ECR) configuration. Each call center has local and long distance telephone circuits configured to handle 200 percent of normal traffic. The local Avaya equipment at each call center is in constant contact with the Single Image System (SIS) Avaya located in Reston, Virginia, which provides call control, queue management and call information.

In the first level of redundancy, key components of the equipment in each of the call centers are duplicated to allow calls to be handled should one component fail. Similarly, each call center has dual connectivity to ValueOptions wide area network. ValueOptions transports all internal voice traffic over this network; should one WAN connection fail, all traffic is seamlessly switched to the second.

In the second level of redundancy where calls cannot be delivered to a particular center, the routing rules will send all incoming toll-free number calls to a consultant at another Military OneSource location.

As with the Avaya call center installations, each of the SIS architectures has duplicated components for the third level of redundancy. This allows each of the central architectures to remain operational and capable of managing 100 percent of all calls if one of the servers fails. In the event that both the Reston 8710s are unreachable, ValueOptions has duplicated the central Avaya architecture in a data center in ~~Arlington~~Richardson, Texas. The Avaya equipment in the call centers re-register with the central servers in the new location, and calls will be processed. In the event that both Reston and ~~Arlington~~ Richardson are unavailable, the equipment in each call center would go into "stand-alone" mode allowing calls to be made and received at each of the Military OneSource call centers without disruption.

In the unlikely event of a call center closure or unexpected increase in call volume, ValueOptions would take an "all hands on deck" approach and call upon every available Military OneSource Consultant to assist callers. The staffing plan utilizes the Military OneSource Consultants to respond to telephonic service requests across the NCR and Chesapeake, Virginia cell center sites, and additional master's-level Telephonic Counselors and Work/Life Specialists. Another resource redundancy will reside with the master's-level Wounded Warrior and other Specialty Consultants.

PWS 4.7.1.1 ORGANIZATION POLICY

We use Sungard's Living Disaster Recovery Planning System (LDRPS) to develop, document, test, and implement the specific protocols we use for executing a system recovery for the Military OneSource website and call center environments. We invite designated staff from the Government to review the initial organization policy and all subsequent changes required as a result of periodic information technology upgrades or changes orders initiated by the government.

PWS 4.7.1.2 TEST PLAN

Our disaster recovery test plan is written and maintained using Sungard's LDRPS Professional Edition software. This ensures that information and recovery methods are well-documented and safeguarded in the event of a disaster, and that appropriate service authorization and data collection continues. Our disaster recovery plans are executed and tested twice each year and tabletop simulations tests are performed quarterly.

PWS 4.7.1.3 CURRENT DISASTER RECOVERY APPROACH AND PLAN

In 1999, ValueOptions implemented a comprehensive and industry-recognized business continuity and disaster recovery plan for our entire customer base. We continually update and test our recovery plans to accommodate ongoing changes and improvements to our technology infrastructure.

The core elements of our business continuity and disaster recovery plans consist of the following:

- stand-by, secondary Data Center in Richardson, Texas
- disaster recovery services with IBM
- high availability of onsite disaster recovery services and automated disaster recovery tools
- comprehensive daily, weekly, monthly and annual backup and recovery services
- national data center hosting safeguards
- telecommunication systems business continuity services
- systems availability, service levels and performance statistics

We maintain a formal and comprehensive Business Continuity Plan that promotes minimal disruption of service in the event that a call center experiences a disaster or temporary closure**.**

Comprehensive Daily, Weekly, Monthly and Annual Data Backup and Recovery Services. Please see **Section 4.3.3**.

Telecommunications Systems. ValueOptions will ensure smooth service delivery and continuity in the event of planned or unplanned outages and has architected our telecommunications platform to support 24 hour a day, seven day a week systems availability. We leverage the CMS part of our telecommunications platform to manage and analyze call patterns to determine and proactively address peak call times. As a result, we maintain a formal and comprehensive Business Continuity Plan that outlines automated and detailed backup and re-routing protocols to alternate call centers. This approach promotes minimal disruption of service in the event that a call center experiences unusually high call volume, a disaster, or a temporary closure. While such incidents are rare, it is vital to maintain a detailed plan so that all staff can quickly and decisively respond to any planned or unplanned incidents. Each call center maintains plans for re-routing of calls in the event of an emergency.

For Military OneSource, interruption of service to any of the call centers will result in immediate routing of calls from the downed site to the other location. During normal operating conditions, the telephony and data systems are fully integrated between the call centers to quickly and easily serve Service Members with no downtime, loss of data, or degradation of quality.

Additionally, each call center will also be pre-configured to automatically re-route calls in the event of partial voice trunk outages. We will seamlessly and instantaneously re-route blocked call traffic. This will be accomplished by using our Network Call Redirect service. Network Call Redirect is the automatic re-route of toll-free traffic by our long distance vendor when our system rings busy or there is a 'ring no answer.' This process will be transparent to the Service Member; there is no down time. Furthermore, we have implemented the Single Image Switch architecture leveraging the Avaya platform capabilities. Therefore, in the event of disaster in the NCR, the Chesapeake call center can continue in stand-alone mode without service disruption. In the event of outage, the Military OneSource Call Centers will enact the following plan:

- The call center director will contact the long distance vendor.
- The long distance vendor will activate their Super Route on a set of toll-free numbers.
- The long distance vendor will move the traffic to pre-specified destinations.
- The Telecom Lead and Operations Director at the site down will notify their respective counterparts at the designated Plan A location(s).
- The Plan A location(s) will notify their respective counterparts at their NCR route in case overflow calls are received.
- When the outage is cleared, the call center director will re-contact the long distance vendor.
- The long distance vendor will restore toll-free service to the original terminations.

ValueOptions partnered with Verizon services and implemented a mirror image of our Avaya architecture and platform, including peripheral services. This mirror platform resides in a premier, secure data center located in Richardson, Texas. This system is maintained in hot-standby mode and continuously auto-synchronizes to the telecommunications system. Therefore, in the event of a catastrophic event in the NCR, the Richardson, Texas facility can fully support all ValueOptions' telephony traffic. Our plans are executed and tested twice each year and tabletop simulations tests are performed quarterly. The most recent, full test was successfully performed in November 2012.

ValueOptions implemented a comprehensive business continuity and disaster recovery plan for our entire client base. We update and test our recovery plans to accommodate changes and improvements to our technology infrastructure. The disaster recovery test plan includes the recovery procedure for each core business application. The plan is built, tested and maintained utilizing a licensed copy of SunGard's Living Disaster Recovery Planning System (LDRPS 10). LDRPS 10 enables ValueOptions to draft and maintain both standalone and unified recovery plans, which includes the use of tabletop exercises that leverage the LDRPS Dependency Map. The LDRPS Dependency Map provides a graphic representation of plan relationships across the various departments and application system platforms. The test scenarios include *Hardware Failure* (servers, storage, processors), *Telecommunication Failure* (circuit loss, network switch overload, router failure), **Power Failure** (server power supplies, utility grid failure, UPS test, stand-by generator cut-over), **Data Restoration** (CONNECTS application suite, website content recovery) and *Hot site Failover*.

EAP Services Website
ValueOptions' Disaster Recovery Plan incorporates special components to ensure the continued availability and functionality of our EAP Service website. Our plan starts with our backup strategy, which includes making regular backups of the website on a daily basis, using intervals of four hours or less. We will use these backups to perform incremental data restorations in the event of a minor data loss

or corruption affecting the website. In the event of a hardware failure (not a complete facility disaster event), ValueOptions leverages a two-scenario recovery contingency plan for the Military OneSource website. Clustered WebSphere® Application servers and real time data replication of core website content, data files and EAP applications will be our primary concern. In this recovery approach, all transactions of the Military OneSource website applications and data are replicated in real time to a fully redundant IBM iSeries application server, utilizing third-party data replication software.

For a more serious incident, we employ a secondary data center "Hot Site," offering failover for extended problems such as a man-made or natural disaster crippling the primary EAP Services website or the Internet. ValueOptions tests the Military OneSource website Disaster Recovery Plan twice a year and we simulate a full site restoration by testing the automatic fail-over to the hot site operation.

Redundancy

ValueOptions has incorporated redundancy into every layer of the infrastructure for the Military OneSource EAP service delivery technical architecture including redundant processors in the Web servers; redundant Web servers and server clusters; redundant network switches, routers and UPS in the data centers; redundant, high bandwidth Internet circuits in the data centers; load balancing to route website traffic to different servers to spread the application processing, and full website failover to redundant Hot Site in the event of emergency.

PWS 4.7.1.4 NO DOWN TIME

ValueOptions ensures that our disaster recovery procedures for the Military OneSource program provide no downtime and no loss of data. This will be accomplished through the implementation of our protocols listed in **Sections 4.7.1.1** along with our redundant computing and telecommunication platforms, as well as comprehensive daily, weekly, monthly and annual data backup and recovery.

PWS 4.8 MILITARY UNIQUE REQUIREMENTS

PWS 4.8.1 PROTOCOLS AND PROCEDURES

The ValueOptions Team drew upon our broad experience of call center and website management to develop protocols and procedures for the Military OneSource program. All protocols were reviewed with and approved by DoD prior to implementation and included protocols for all actions specified in **Section 4.8.1,** including warm hand-offs between the Military OneSource Service Member and organizations including TRICARE, non-medical counseling providers, as well as military community and family service agencies such as Army Community Services (ACS), the Navy's Fleet and Family, Marine Corp Community Services (MCCS) and Air Force Family Matters. A primary concern of all these protocols is to ensure that the Service Member does not have to repeat his or her story any time a new party is engaged in the process. Our staff conducts a no-hold conference call to convey whatever information is needed to preclude the caller from having to repeat anything.

Our protocols are driven by our CONNECTS platform and our Avaya telephone system. These tools enable us to track and monitor all Service Member contacts to create a real-time historical snapshot of any client interactions beginning from day one of the program. All ValueOptions staff and appropriate subcontractors have the capability of reviewing all call records from Military OneSource Service Members to become familiar with any issues they have presented. This review of information is

seamless to the Service Member, preventing us from having to ask about previous calls, contacts, and assistance that they may have received. Furthermore, our team has firsthand experience handling Military OneSource call hand-offs for follow-up support and assistance from our TRICARE contract.

ValueOptions' expertise, developed through years of experience delivering EAP and Work/Life services and in customizing resources for unique populations, enables us to provide information that is tailored to the needs of Members and their families. Whether the topic request focuses on wellness or finances, on everyday issues or dependent care, or is an issue unique to the military such as a request related to military benefits, the Military OneSource Consultant will assure that both military-specific and general topic information is included in the educational materials that are provided to the Member.

PWS 4.8.2 CUSTOMER SERVICE ATMOSPHERE

The ValueOptions Team has had the privilege of serving Military Members and their families for more than 20 years. We pride ourselves not only on our institutional understanding of military culture in all its facets, but also on the commitment of the ValueOptions staff, in whatever role, to treat Service Members, family members or retirees, regardless of rank or any other factors, with equal respect, concern, compassion, and effort. An example of this compassion and desire to help already exists within our dedicated team, as evidenced by our efforts to proactively respond to the increased need for behavioral health support for troops returning from successive deployments in Iraq. Upon hearing of large troops returning to Killeen, TX, our team collaborated with the community providers, requesting that they expand their availability and support for the Active Duty Service Members and their families. In response to our outreach, the provider network in and around the Killeen area went out of their way to extend their office hours to include late evenings and weekends.

It is not uncommon for our employees to receive hand written notes of thanks and appreciation from Service Members and their families for going out of their way to do whatever they could to assist them in their time of need. We are proud of the genuine caring that is regularly demonstrated by our staff and will promote this same compassion throughout our Military OneSource team. This is our absolute commitment in delivery of the Military OneSource program. Upon hire, our Military OneSource staff receive extensive training on many facets of military life, culture, and challenges such as the impact of deployment on the family. Many of our employees are themselves former military, Guard/Reserve component, or military spouses, affording them the first-hand experience of the challenges of military life.

One way that customer service respect is reinforced is through regular monitoring of customer phone calls for quality monitoring purposes. Should a supervisor ever encounter an exchange in which it is felt the employee was anything less than respectful of a Military OneSource Service Member, immediate disciplinary action will be taken, up to and including termination.

PWS 4.8.3 INITIAL AND ONGOING TRAINING

All Military OneSource staff receive comprehensive initial and regular refresher training on military customs, traditions, environment, benefits and military programs. Besides this "basic training," we have developed and conduct ongoing staff education on the entire range of issues, which impact Service Members and military families. In addition to formal training, Staff participate in regular "town-hall"

meetings, to keep staff aware of and current on any community, regional, or national issues that are relevant to the people we serve. The ValueOptions Team training always includes post-training tests, to ensure comprehension and understanding of the subject matter. Failure to demonstrate adequate understanding of the training materials results in corrective action with the expectation that the necessary learning and retention will be achieved and maintained over time **(see also Section 7.1.1)**.

PWS 7.2 MILITARY ONESOURCE STRATEGIC OUTREACH OBJECTIVE AND SECTION L17, FACTOR 1, 1.F

ValueOptions understand that the strategic outreach component of the Military OneSource program is designed to raise awareness among eligible populations of the services available to them through the program. As such, we will continue to provide promotional, educational and informational materials that support Service Members and family members in dealing with the challenges of military and family life. Additionally, we recognize that military leaders and service providers are important parts of this population. ValueOptions has supported our EAP customers with a wide variety of strategic outreach materials and will continue to provide the Government and Military OneSource Program Office our expertise in branding the Military OneSource program. We will work with the Government to promote consistent messages and themes that support the vision that the Military OneSource Program Office has established.

7.2.1 MINIMUM REQUIREMENT FOR MILITARY ONESOURCE STRATEGIC OUTREACH

When directed by the Military OneSource Program Office, ValueOptions works in collaboration with the DoD to develop and implement strategic outreach plans and educational/promotional materials for areas such as Family Support, Children and Youth, Family Advocacy, Families with Special needs, Careers and Education, Deployment, Recreation, and Financial. The Military OneSource program includes access to an internal team of content experts within ValueOptions. This team of individuals is responsible for writing, editing and reviewing content, contracting with third party resources for the development of content and working with our customers to make sure the educational/promotional materials meet the needs of the DoD and Military OneSource Program Office. ValueOptions creates engaging educational/ promotional materials that take into account diversity within the military population including but not limited to age, rank, gender, ethnicity and socio-economic status.

7.2.1.1 EDUCATIONAL/INFORMATIONAL MATERIALS AND REFERRAL INFORMATION

As a part of our normal EAP support services, ValueOptions provides educational and informational materials and referral information. In addition, ValueOptions provides the Military OneSource Program Office access to a website through Achieve Solutions where a variety of educational/informational materials and referral information can be downloaded and customized. Our educational information covers hundreds of topics developed over many years of working with hundreds of organizations with varied workforce demographics. Topics include: marriage, parenting, stress, change management and resilience, grief and loss, disaster and crisis response, financial and legal support, health and wellness, career issues, and many more. The broad array of topics does not include specific treatment

recommendations for conditions not covered under the Military OneSource program; however, readers can review symptoms and confirm the appropriate place to seek treatment such as TRICARE.

Not only do we engage visitors through the breadth and depth of our content, but we convey that information through many content types, including podcasts, videos, tip sheets, handbooks, workbooks, trainings, quizzes, calculators, articles, Web links and more. We also provide customized packets on key themes and transition points such as relocating, deployment, and grief and loss.

The educational/informational materials can be obtained through self-service or sent to interested parties by calling the Military OneSource toll free number. Many of these materials are produced monthly, archived, and can be accessed on demand. These materials include but are not limited to such standard materials as brochures, posters, sample e-mail communication materials, training and orientation materials, video, tip sheets, articles, prevention programs, Web banners, TV slides, workshops and calendar events. In addition, ValueOptions provides materials to support national observances and other events that are of particular interest to members.

We will partner with the MC&FP Military OneSource program leadership to collaboratively plan for additional topics and content items based on a review of anticipated and emerging issues, call and Web utilization trends, and site feedback, as well as larger military initiatives that this program might support and reinforce.

PWS 7.2.1.2 SPECIAL EVENTS

As directed by the Military OneSource Program Office, ValueOptions provides resources to assist with special events not considered to be a part of the Joint Family Support Assistance Program, such as operating a booth with Military OneSource information and answering questions about the Military OneSource program, or sending outreach materials to support an event. ValueOptions, through our existing EAP services, routinely offers resource support to customers for such events as health fairs, large employee gatherings, special events, or other activities that represent an ideal opportunity to promote the availability of the program. ValueOptions infrastructure is such that resources are made available to support these unique events through both internal and subcontractor resources. As an example of our flexibility, in just a few hours we prepared disaster response materials following Super Storm Sandy. We recognize that the Government does not seek a cookie cutter approach and as such we have proactively provided materials that reflect the evolving needs of military families and the Military OneSource program.

PWS 7.2.1.3 MONTHLY REPORTS

We will continue to provide the government with monthly reports capturing call center and counseling data, and if requested, ValueOptions will provide assistance with analysis to enhance outreach activities. By reviewing and analyzing usage data and trends from the call center, telephonic counseling, website usage and Work/Life requests, ValueOptions can identify areas that may suggest we want to increase program promotion on a particular topic or content area. This becomes evident when unique trends occur that perhaps vary from our book of business experience or industry norms.

PWS 7.2.1.4 OUTREACH MATERIALS

As requested, ValueOptions has developed and acquired outreach materials such as pamphlets, books, CDs and games, (including DoD materials) that pertain to all aspects of the Military OneSource program and speak to the specific issues of Service Members and their families. ValueOptions brings to this relationship decades of experience in contracting with leading creative design organizations and recognized industry subject matter experts to create engaging and eye-pleasing outreach materials. ValueOptions will continue to work with the Military OneSource Program Office to assess specific needs for outreach materials and the evaluation process regarding the effectiveness of such materials.

PWS 7.2.1.5 TARGETED INFORMATIONAL MATERIALS

In case of a national or command level crisis or emergency situation such as a hostage situation or natural disaster, ValueOptions will develop and distribute crisis response materials within 24 hours of the request. ValueOptions recognizes that the needs following a crisis evolve as the crisis plays out and also varies significantly depending upon the type of event. For example, within 24 hours, ValueOptions has created unique informational materials following Superstorm Sandy, Katrina, shootings at Virginia Tech, 9/11, Japan Tsunami, China earthquake, and other disasters. More importantly, the materials we have provided have evolved and been updated on an ongoing basis as the needs of our customers change during and after a crisis. We recognize that it is the reputation of our clients at stake during a crisis and as such we will be a trusted partner to promote a response with only the highest quality support materials.

PWS 7.2.1.6 REVIEW AND UPDATE OUTREACH MATERIALS

As an ongoing element of the Military OneSource program, ValueOptions will regularly review and revise outreach materials to keep them fresh and relevant. ValueOptions' Health & Performance Solutions Quality Committee (HPSQC), with Military OneSource representation, reviews internal plans to assure the outreach materials remain relevant and maintain an engaging look and feel. Our editorial team also has a calendar for reviewing existing content to make sure that materials are reviewed for accuracy, relevance and clinical appropriateness.

PWS 7.2.1.7 QUARTERLY AND MONTHLY THEMES FOR STRATEGIC OUTREACH

Based on guidance from the government, ValueOptions created quarterly and monthly themes for strategic outreach. Each August, our editorial team begins to develop a calendar for monthly themes for the following year. This calendar is a living document and is revised as customer needs or interests evolve. This calendar serves as a guideline for promotional themes and is based on topics of interest as well as national observances.

PWS 7.2.1.8 MEDIA CHANNELS AND VENUES

As requested by the government, ValueOptions has prepared outreach materials to be posted at venues such as the Armed Forces Press Service, Defense Media Activity, government sponsored media events and government managed social media pages. ValueOptions recognizes that these events represent unique opportunities to promote the value and benefits available through the Military OneSource

program and as such, will provide materials that support this effort in numerous modalities such as Web support, hard copy or electronic. The diversity of our materials and communication methods will continue to support these important and high profile events.

PWS 7.2.1.9 INVENTORY MANAGEMENT AND WORLDWIDE DISTRIBUTION FOR OUTREACH MATERIALS

In collaboration with our subcontractor RR Donnelley, all outreach materials are inventoried and distributed worldwide, including all EAP outreach materials, all current government owned Military OneSource materials, and all government developed or purchased materials.

PWS 7.2.1.10 ORDER FULFILLMENT MATERIALS

Materials are available for download from the Military OneSource website. Participants may also order them via the toll-free phone number or the website for worldwide delivery. We store materials at our fulfillment warehouse, and ship them within 24 to 48 hours of order by the most cost-effective, tracked method of delivery

PWS 7.2.1.11 REPLENISH INVENTORY

We replenish materials at the Government's direction. Our Fulfillment Coordinator works with the MC&FP point of contact to coordinate receipt and distribution of Military OneSource materials.

PWS 7.2.1.12 MATERIAL COST

It is understood that any material costs associated with strategic outreach must be approved by the COTR in writing.

2. NON-MEDICAL COUNSELING

PWS 5.0 NON-MEDICAL COUNSELING OBJECTIVES AND SECTION L17, FACTOR 1, 2.A

Our long-standing support and connection with Service Members and their families and our history in the EAP industry, paired with our national network of Military OneSource trained and credentialed providers, make us particularly qualified to support the non-medical counseling needs of Military OneSource Service Members and their families. The ValueOptions Team provides private and confidential situational and problem solving, financial, education, career and employment, and health and wellness non-medical counseling services on the full array of topics identified in **PWS 5.0**. The non-medical counseling services are private and confidential and may be provided face to face, on-line and telephonically, based on the client's preference or on service appropriateness. Face-to-face counseling sessions will be limited to twelve sessions per presenting issue. If an individual requires assistance beyond that provided through non-medical counseling, we will coordinate a referral and appropriate linkage to TRICARE or other community resources that can support a higher level of care.

Military Members experience unique circumstances including long deployments, loneliness, single parenting, and relationship issues, family reunions and homecomings, all of which can be very stressful to families. When these individuals call, the initial call will be answered by one of our Military OneSource Consultants. These individuals conduct the initial triage and needs assessment and are Master's-level trained professionals in a mental health field. Their role is to engage the caller, provide motivational support and determine the most appropriate resource to meet the caller's needs in an efficient and timely manner. In addition, the Military OneSource Consultant asks the caller a brief series of questions to determine that services requested are within scope of the Military OneSource program. They conduct a brief triage and if there is any indication by the caller of an immediate or potential risk, or request of services that are outside of the scope of the Military OneSource program, the Consultant will make an immediate referral to the appropriate resources, e.g. TRICARE, MTFs and other resources/services. In addition, if there is any question or uncertainty as to the caller's needs and whether the request is within the program's scope, the Military OneSource Consultant will make a warm transfer to one of our licensed Military One Source Counselors, who will then conduct a more thorough needs assessment to determine whether the request falls within the program scope. This additional assessment, while necessary for only a small percentage of callers, is one additional safe guard to ensure that at the onset of our contact with a caller that we provide linkages to the most appropriate resource and remain within the scope of the expectations the Government has for the Military OneSource program.

In addition, when indicated, ValueOptions offers non-medical counseling services to give Members and their families' access to professional resources that will help them manage their day-to-day concerns in a confidential manner. Up to twelve confidential non-medical counseling sessions per problem are available in-person with a local provider, telephonically or online. Non-medical counseling services are often complemented through additional resource and referral assistance such as community resources and self-help groups. During an initial call or contact with the Military OneSource Program, a Military OneSource Consultant performs a triage and needs assessment to identify any and all life issues affecting Members. When appropriate or when requested, the Member will be offered the option of accessing non-medical, in-person, 50-minute counseling services with a provider or speaking to a Military OneSource Telephonic Counselor to receive telephonic or Web-based counseling support. We

have years of experience in providing non-medical counseling and locating local resources for individuals facing the life challenges reflected in **PWS 5.0**, including issues such as: situational/problem solving counseling; pre-deployment and post-deployment stress; adjustment issues; relationship conflicts (personal and service related); confidence, depression; violence; infertility; and balancing work and family.

Military OneSource Telephonic Counselors provide non-medical counseling assistance for issues including problem solving, financial, and health and wellness as defined in **PWS 5.0**. However, there will be times when the Members' concern may benefit from a consultation with one of our Work/Life Specialists, an expert in adult care, childhood services, health and wellness, or any of a myriad of quality of life issues. The Work/Life Specialist can provide additional information and consultation on complicated topic areas such as parenting, schoolwork/grades, children with special needs, and older adults with dementia, just to mention a few.

Member follow-up services and outreach for non-medical counseling is designed to ensure that the resources provided thoroughly met their needs and that the situation they presented has been resolved. Our philosophy for Members and their families is that there is no problem too large or too small for which we cannot help. Using ValueOptions' proprietary CareConnect system, we will confidentially track a Member's service request for non-medical counseling and refer the Member to a resource that specifically meets his or her needs. The Military OneSource Consultant will own the case and work with the caller providing linkages to other specialty services and support when indicated. When face-to-face non-medical counseling is desirable, during the initial contact, we will ask about any resource and provider preferences including such things as age, gender, culture and language. Our robust and specialized network of licensed professionals is uniquely qualified and credentialed to provide non-medical EAP services in the key areas specified in **PWS 5.0.** Our network providers are specifically trained on topics and issues most relevant and important to military families to be the most effective advocate when providing non-medical counseling.

PWS 5.0.1 SCOPE

ValueOptions recognizes that the purpose of the Military OneSource program is to provide non-medical counseling services and to provide linkages and referrals to other services when indicated. Under our non-medical, solution focused, problem solving counseling program, ValueOptions can address and resolve a number of Member concerns and issues before they escalate and become more serious or require medical intervention. For example, under a twelve-session model, we will address a myriad of V-Code and everyday life issues and stressors such as relationship issues, adjustment, career, parenting, stress, anger management, communication issues as well as life events such as the birth of a child, grief, dealing with an elderly parent's needs, managing a new diagnosis, deployment, reintegration and the like. Without the assistance of others, these issues have the potential to lead to increased stress, poor problem solving skills, a more serious mental health or medical issue or feelings of isolation and distress.

ValueOptions has also developed industry-leading criteria that serve as guidelines for when non-medical or EAP counseling support is contraindicated. For example, following a triage and needs assessment by the Military OneSource Consultant, if a participant presents with a DSM IV diagnosis such as severe depression, PTSD, anxiety, TBI, delusions or other symptoms indicative of a more medically-based

issue, ValueOptions will immediately coordinate a seamless and smooth transition to TRICARE or other medical benefits. Because of our long standing history in providing both medical and non-medical services, it is routine for us to be able to assess the differences between the two, clearly work within the scope of our role and responsibility and to assure that appropriate linkages occur so that the Service Member and/or his/her family receive the support they require. In addition, during implementation of our original contract, we worked with the Government to develop clear protocols and policies that assist our staff in making suitable linkages to the Family Advocacy Program, Victim Advocate Sexual Assault Response Coordinator, or mandated duty to warn entities. Such referrals and sensitive handling of these cases is required of the Military OneSource program even though they are not to be resolved specifically within the scope of Military OneSource. ValueOptions routinely develops similar protocols for customers in regulated environments or who have programs that must be coordinated with outside of the scope of the EAP.

PWS 5.0.1.1 FACE-TO-FACE COUNSELING SERVICES

ValueOptions confirms that all face-to-face counseling services administered to Military OneSource Clients under this program will be provided within the civilian community.

PWS 5.0.1.2 COUNSELING HYPNOSIS

ValueOptions understands that hypnosis shall not be administered by Military OneSource staff and network providers for any Military OneSource Client through this contract.

PWS 5.0.1.3 NO SELF-REFERRAL

ValueOptions understands that the Government requests that the Military OneSource vendor not allow provider self-referral. ValueOptions will not allow Military OneSource providers to self-refer for clinical mental health therapy or additional counseling services. ValueOptions prohibits providers from self-promotion and requires that they adhere to their role in providing non-medical counseling.

ValueOptions will also adhere to the standard of referring Members to providers within a 15 mile radius or 30 minute drive of their home or place of work, based on their preference. Should no network providers be available within this proximity, ValueOptions will offer a referral to a credentialed provider in the closest location to the Member. If the distance to the network provider is not acceptable to the Member, ValueOptions will seek to identify a non-network provider who is willing to accept the referral and adhere to Military OneSource standards. A document describing these standards will be executed with the provider in order to reduce any risk of misunderstanding or attempts to provide services outside of scope. While there are some locations so remote that no providers have practices within reasonable driving distances, it is our experience that individuals living in such remote areas are accustomed to traveling longer distances to obtain even everyday services such as shopping or routine health care. We will offer telephonic or web-based counseling as an alternative to travel but ValueOptions will also exhaust all possibilities in searching for local resources to provide the non-medical counseling.

PWS 5.0.1.4 ISSUE OR CONCERN SPECIFIC

The Military OneSource program, delivered by ValueOptions, supports the notion that non-medical counseling is based on problem or issue resolution and should focus on building on an individual's personal strengths while supporting them to achieve their aspirations and goals. ValueOptions will promote this by providing linkages to military resources, community resources as well as the myriad of services available including coaching, non-medical counseling and other ancillary support services.

PWS 5.0.1.5 ASSURING ADHERENCE TO SCOPE

ValueOptions confirms that it is our responsibility to ensure that Military OneSource staff and non-medical counseling providers adhere to the scope of practice as outlined for the Military OneSource Non-Medical Counseling Programs.

PWS 5.0.2 CONFIDENTIALITY

PWS 5.0.2.1 PROTECTING INFORMATION

All ValueOptions employees, contractors and subcontractors that have access to confidential information will adhere to the strict confidentiality guidelines defined by both the Privacy Act of 1974 and ValueOptions internal policies and procedures. This includes ongoing training and annual signature requirements regarding attestation and acknowledgement of the confidential and sensitive nature of our work.

PWS 5.0.2.2 RECORD KEEPING SYSTEM

To assure Member confidentiality while providing counselors easy access to information in the common data record, history files and case notes, our Web-based case management system has been engineered to restrict access to client information based upon the use of an imbedded access authorization security feature. This imbedded feature allows us to restrict access to our information system and application. This system access and control function enables us to:

- restrict access to information on a least privilege basis
- restrict access to specific system functions and information based on an individual user profile including inquiry only capabilities and the ability to create, change or delete certain data (global access to all functions shall be restricted to specified staff)
- restrict unsuccessful attempts to access system functions to three, with a system function that automatically prevents further access attempts and create an audit trail records these occurrences

ValueOptions maintains a record keeping system that is designed with the utmost attention towards protecting Members' confidentiality. At the time of the initial call and triage by the Military OneSource Consultant, we will explain to callers the limits and terms of confidentiality of the program. This includes the fact that we adhere to the strictest terms of confidentiality as it relates to our record keeping practices for personal identifying information. As such, all written records of counseling session content will be maintained either by our Military OneSource staff, or by our network provider who provided the counseling support.

ValueOptions will obtain from all providers seeing Military OneSource Members a signed contract addendum which stipulates the requirement that they provide ValueOptions and the Government a copy of their case notes for auditing purposes or review of any adverse incidents. In addition, ValueOptions maintains images of all Case Activity Forms from providers providing non-medical counseling. When ValueOptions provides telephonic non-medical counseling, these services will be documented in our case management system.

In addition, the Military OneSource Consultant will share at the onset of a call with a Member the strict adherence we take to protect confidentiality and the rare circumstances in which that confidentiality can be broken due to federal and state law. We will also inform the Service Member and/or family member seeking assistance that their personal identification information will be maintained under our strict confidentiality protocols, and will not be released to the military command with the exception of instances of imminent risk and duty to warn, as described in **Section 5.0.4.**

PWS 5.0.2.3 CHAIN OF COMMAND INFORMATION

When a military chain of command requests information on a specific individual from either a provider or ValueOptions' staff member, we will share the confidential nature of the program and that this information is protected under Federal and State law. We will work with the Chain of Command to support their perceived need for any information by encouraging their direct contact with the Member that they may have referred. We will, of course, neither admit nor deny any individual's participation in the program.

PWS 5.0.3 INFORMED CONSENT

PWS 5.0.3.1 COMPLIANCE WITH DOD INSTRUCTION NO. 6490.06 COUNSELING SERVICES

ValueOptions provides and will continue to provide all participants in the Military OneSource program a Statement of Understanding (SOU) that requires their signature. This SOU defines the role of Military OneSource staff and network provider in serving the Member as well as outlines the scope of non-medical counseling services available to the Member as well as the availability of referrals.

PWS 5.0.3.2 MANDATED REPORTING REQUIREMENTS

The Military OneSource Statement of Understanding (Informed Consent) also includes language as defined in **PWS 5.0.3.2** that clearly outlines the mandated reporting requirements including those pertaining to the Personnel Reliability Program (PRP). The Statement of Understanding currently used has been approved by the Military OneSource program management team.

PWS 5.0.4 IMMINENT RISK/DUTY TO WARN/MANDATED REPORT

PWS 5.0.4.1 POLICES AND PROCEDURES

ValueOptions maintains policies and procedures regarding reporting obligations pertaining to duty to warn and mandated reporting if a client reveals reportable issues. These policies have been updated to

reflect any nuances or requirements by the Government and staff receive regular training on adherence to these revised policies.

PWS 5.0.4.2 COMPLIANCE WITH DOD AND BRANCH REQUIREMENTS

ValueOptions has implemented, documents and maintains policies and procedures related to duty to warn specific to DoD and Military Branch of Service requirements. This includes mandatory reporting to appropriate authorities and chain of command.

PWS 5.0.4.3 DUTY TO WARN/MANDATED REPORTS

ValueOptions agrees to continue to maintain monthly report logs pertaining to all cases involving Duty to Warn. These report logs have not and will not contain any personally identifying information but will include those elements defined by the Government in **PWS 5.0.4.3.** In addition, these cases will be reviewed internally by the appropriate supervisor.

PWS 5.0.5 DOCUMENTATION

PWS 5.0.5.1 FORMAL DOCUMENTATION

Formal documentation of all Military OneSource non-medical case records is and will be maintained. ValueOptions conducts routine audits on Military OneSource Counselor case records to ensure the quality, accuracy and timeliness of all documentation for non-medical counseling. Supervision addresses any record keeping issues and the highest standards of documentation for non-medical counseling cases are enforced. ValueOptions adheres to Council on Accreditation (COA) standards regarding record keeping audits including Standard 7.03 which cites that cases are reviewed quarterly during case consultation to assess: a.) service plan implementation; b.) progress toward achieving service goals and desired outcomes; and c.) the continuing appropriateness of the service goals. The interpretation of this standard by COA includes that experienced workers may conduct reviews of their own cases. In such cases, the worker's supervisor must review a sample of the worker's evaluations as per the requirement of this standard. Timeframes for review should be adjusted depending upon issues and needs of the persons receiving services and frequency and intensity of services provided. ValueOptions internal standard exceeds this expectation in that all high risk cases will be reviewed with a supervisor.

PWS 5.0.5.2 CASE DOCUMENTATION

ValueOptions will continue to maintain all Military OneSource documentation for non-medical cases in a secure case tracking system. The case record includes Military OneSource Consultant triage/assessment and notes, all provider case activity forms and all telephonic counseling and coaching case information. In addition, ValueOptions maintains case records for Work/Life services as well as requests for financial, tax preparation, career counseling, mental health/financial issues and wellness program information and all other non-medical case information.

PWS 5.0.6 WARM TRANSFER/REFERRAL PROCESS

PWS 5.0.6.1 SCOPE OF SERVICES

When services are requested either through a toll free number or through the Military OneSource website, a Military OneSource Consultant conducts an initial triage and assessment. This assessment results in determination of how we can best meet the Member's needs. The initial triage and needs assessment conducted by the Military OneSource Consultant is a brief series of questions necessary to facilitate linkage to the most appropriate resource in a timely manner. If there are any questions or concerns as to whether the services being requested are within the scope of the Military OneSource program, then the Military OneSource Consultant will make a warm transfer directly to one of the Military OneSource Counselors. If it is determined that the caller's needs are within the scope of the Military OneSource program, referrals are provided as appropriate. This may include a referral to medical services as required; for non-medical counseling, it may include telephonic or in-person assistance, telephonic health and wellness coaching, career counseling, work/life support, legal or financial assistance, or referral to a community or military resource. For any urgent or emergent issues, the Military OneSource Counselor conducts a warm transfer and stays on the line with the Member until we are assured of a successful transition to a higher level of care and critical case information has been shared with the appropriate parties. For referrals to non-medical counseling services, the Military OneSource Consultant provides those services directly or conducts a similar warm transfer to one of our specialists. Any time a Military OneSource Consultant or Counselor needs to refer a caller to another resource (whether it is a network provider, Tricare, a military treatment facility, community resource, financial counselor or a work/life specialist, etc.), a warm transfer will be conducted. A warm transfer occurs using state-of-the-art telephony technology while the Military OneSource Consultant/Counselor remains on the line and can ensure a successful transition. The Member's experience is a seamless one, providing them linkage to the right resource at the right time.

PWS 5.0.6.2 WARM HANDOFF

The Military OneSource Consultant who conducts the warm handoff does so with the caller on the line and will not disengage from the call until after a three-way call has resulted in a brief introduction of the Specialist and the Member's needs are identified. The case tracking system within ValueOptions occurs in real-time, so there is never a need for a Member to "repeat their story"; rather, the time is spent in refining and detailing the unique needs of the caller and identifying the best resources to support them.

PWS 5.0.6.3 SATISFYING CLIENT PREFERENCES

When making a referral to a community provider for non-medical counseling, as a matter of routine and part of the intake process, we ask whether there are any unique preferences regarding counselor age, gender, ethnicity or language. Our provider database allows us to refine our search based on these unique provider attributes, and we make best efforts to satisfy these Member preferences.

PWS 5.0.6.4 PROTOCOLS AND PROCEDURES

ValueOptions welcomes the opportunity to utilize existing protocols and procedures established in concert with the Government's Military OneSource Program Office. ValueOptions believe that such protocols and procedures help to establish a common expectation of how cases will be handled, and

become critical guidelines that are used in the training of our staff and in the development of a customer-specific quality review process.

PWS 5.0.7 FOLLOW-UP

During the initial triage and assessment the Military OneSource Consultant will secure the Member's permission to follow-up with them. With that permission secured, we follow-up to confirm that the services provided met the Member's expectations and needs and that they were fully satisfied with the services provided. ValueOptions understands that the needs of the Government may change over time, and as such will conduct other types of outbound follow-up calls as requested.

PWS 5.0.8 NOTIFICATION OF ADVERSE INCIDENT

Given the nature of the services provided and the unique stress that our military families are under during war time, we recognize that adverse incidents in one form or another could occur. ValueOptions maintains a strict protocol on how we handle adverse incidents, and we have also added to that protocol immediate (within 24 hour) notification to the Government's Military OneSource Program Office of any situation or incident that could result in increased scrutiny of the program and/or media attention.

PWS 5.0.9 NON-MEDICAL COUNSELING PROVIDER REQUIREMENTS

PWS 5.0.9.1 CREDENTIALING

Credentialing/Re-credentialing Requirements. The ValueOptions Team credentials and re-credentials providers according to policies and procedures set forth by Network Operations, which are based on National Committee for Quality Assurance (NCQA) requirements. The credentialing program specifies the procedures for application to the network, required documentation, NCQA-compliant credentialing verification, and review and decision for admission by the National Credentialing Committee. The ValueOptions Team's National Credentialing Committee (NCC) provides oversight for the credentialing and re-credentialing of applicants for network participation. The process for credentialing providers includes the following steps:

- an application, two contract agreements, and a fee schedule are mailed to the targeted practitioner and all applicable systems are updated
- the practitioner sends the completed application, agreements, and required documents back to us
- information is forwarded to a Credentialing Specialist, who reviews the application for completeness and determines if the practitioner meets ValueOptions' established credentialing criteria, including any client-specific criteria for specific networks
- once approved for completeness, the application is sent to the internal primary source verification (PSV) unit for PSV
- once PSV is completed, the application is returned to the Credentialing Specialist
- once approved by the Credentialing Specialist, a Quality Control (QC) audit is conducted on the file
- once the file passes the QC audit, it is sent to the NCC for approval, and once approved, the file is sent to Data Entry

- a Data Entry Specialist updates the file in the system and the practitioner is sent a signed copy of the executed contract, a welcome letter with information on trainings available and accessing the provider manual available on the ValueOptions website
- the remaining signed contract agreement and practitioner file are sent to QC for review, and once successfully audited, it is filed

In addition, all Military OneSource providers must complete military culture training as part of their credentialing process as well as sign an attestation of understanding of the scope of the Military OneSource program.

Re-credentialing. The provider re-credentialing process, which occurs every three years, is typically initiated four months prior to the re-credentialing due date. The provider is sent a re-credentialing application, or has the option of completing a paper-less re-credentialing process online through ProviderConnect. Once the packet is completed and received by the ValueOptions Team, the re-credentialing process follows the same course as credentialing except that once the provider's application is verified through primary sources, the Credentialing Specialist gathers performance data which further demonstrates the practitioner's continuing eligibility for inclusion in our network. This information is gathered from Member complaints, quality improvement activities and utilization management data and is part of our Provider Quality Performance tool. The credentialing process includes a review of the provider's history of malpractice claims, loss of license, felony convictions, loss/limitation of privileges, disciplinary action, and the absence of present illegal drug use; the findings of these reviews are recorded in the credentialing module. A quality audit is performed, to ensure that provider data is entered into the credentialing system accurately, and the file is forwarded, with recommendation to either continue network participation or to dis-enroll from the network based on the findings, to the NCC for approval.

PWS 5.0.9.1.1 BACKGROUND CHECK

ValueOptions confirms that we will not use a network provider at any location at any time during the performance of this contract until verification of Criminal History and Fingerprint Check background check is initiated. The fingerprint checks will be completed within 90 days of initiation, and the FBI report will be stored in the provider file, along with certifications and background checks which will be available for Government review at any time during performance. All fingerprint checks comply with the minimum standards of DoD Instruction No. 1402.5. We annually certify that provider licensure, insurance, credentials, background and fingerprint checks are current and proper, and verify that there have been no license suspensions or investigate. We will comply with DoD Instruction No. 1402.5, Criminal History Background Checks on individuals in Child Care Services for Non-medical counseling providers working with children under the age of 18 years. We confirm that, except in Duty to Warn, or Mandated Reporting situations, we will obtain parental/guardian approval prior to rendering counseling services.

PWS 5.0.9.1.2 PROVIDER STANDARDS

ValueOptions offers a mature, national EAP provider network. One of the true benefits of ValueOptions' comprehensive national network is that our clients' Members can access care from virtually anywhere. ValueOptions credentials and recredentials practitioners, facilities and programs

according to policies and procedures set forth by National Networks Development and Management, which are based on National Committee for Quality Assurance (NCQA) requirements.

Non-Medical Counseling Provider Qualifications
Providers must have the following minimum credentials to be considered for participation in ValueOptions' provider network:
- master's degree or higher in a mental health discipline from an accredited college or university
- current and valid state license to practice independently at the highest level in the state where practice is to occur
- minimum three years post licensure experience in a mental health/substance abuse/EAP setting providing direct ~~patient~~ care
- except as state law provides, maintain professional liability insurance coverage of $1,000,000 per episode/$1,000,000 aggregate

In addition to meeting the minimum standards described above, our EAP providers must also have the following:

- assessment and diagnostic skills
- familiarity with job performance issues
- familiarity with worksite issues
- skills in management consultation
- clinical experience in substance abuse assessment
- specific training in focused, short-term therapy

Experience
ValueOptions EAP providers are well-equipped to handle a breadth of Member issues. Our network of providers can professionally assist Military OneSource Members with enhancing morale, quality of life, and job performance. Further, our Military OneSource providers are provided training to enhance their knowledge of military culture, resources, and the unique challenges experienced by Service Members and their families.

PWS 5.0.9.1.3 PROVIDER CERTIFICATION

Primary Source Verification (PSV). When the ValueOptions Team credentials a provider, we use PSV to ensure the veracity of the provider's license and malpractice history. If during the course of PSV, we identify issues, we engage in further research to reconcile the identified concerns and/or seek additional information from the provider. At the time of re-credentialing, the ValueOptions Team re-verifies the provider's license and malpractice history. Verification, in addition to being performed during credentialing and re-credentialing, is performed monthly using a variety of resources which include the National Practitioner Data Bank (NPDB), Office of Inspector General (OIG), and state licensing boards.

PWS 5.0.9.2 TRAINING

In addition to a master's degree and licensure/certification from their specific states, to qualify as a provider, they must have clinical experience in substance abuse assessment and referral (to assure substance abuse situations, which are out of scope for the Military OneSource program, are

appropriately referred) and brief, solution-focused counseling for non-medical issues, and be specifically trained to handle issues related directly to work and life balance. Their training includes specialization in areas such as marital/couples issues, family relationships and concerns, parenting, childcare, loss and grief, stress, balancing work and family, financial issues and crisis response.

PROVIDER TRAINING

The ValueOptions Team has developed a comprehensive educational/communication infrastructure to assure providers are both continuously informed of our programs and services as well as offered an opportunity to provide meaningful feedback. Recognizing that communication vehicles must be varied and frequent, we have developed the following approaches for our provider education and interface:

- monthly e-newsletter
- formal provider alerts
- face-to-face provider forums (both individualized and group sessions)
- monthly Webinars (online training sessions sponsored by The ValueOptions Team)
- ongoing access to free CEUs (Continuing Education Unit) through an online program, Essential Learning, which includes offerings specific to serving Members of the military and their dependents such as:
  - ➤ Information & Referral for Military Service Members and Their Families
  - ➤ Military Cultural Competence
  - ➤ The Impact of Deployment on Families and Children, Part I: Understanding Military Families and the Deployment Cycle
  - ➤ The Impact of Deployment on Families and Children, Part II: Enhancing the Resilience of Military Families

> Through Essential Learning network providers will have access to more than 900 hours of online, interactive courses designed by educational technologists using adult learning principles. The site includes curricula and accreditation crosswalks to help users select courses to develop a personalized training plan.

- website, including a secure, individualized message center for each provider to submit and receive responses to inquiries
- Provider Pulse auto-dialer (voicemail messaging to notify and remind providers of key requirements or new offerings)
- medical grand rounds and specialty training to enhance providers' clinical skills and expertise

Training for New Providers. New provider training occurs after a provider receives his or her welcome packet from the ValueOptions Team. Program materials including the Provider Handbook, provider newsletters, and specific presentation handouts are distributed to all participants. The goals of the basic training are to:

- outline the ValueOptions Team's philosophies of network development and management
- describe the process for care and referral management, according to federal, state and the ValueOptions Team's standards
- familiarize providers, their office staff, and agency employees with the Provider Handbook
- develop competency in checking eligibility, requesting authorizations, using the *ProviderConnect* system, and filing invoices and other forms
- provide an opportunity for questions and clarification
- establish ongoing communication mechanisms
- provide key contacts for obtaining assistance

Military OneSource Orientation for Network Providers. Although we currently have a well developed provider network for the Military OneSource program, we continue to seek qualified providers especially in remote parts of the country. Our provider orientation includes the following information:

- A detailed explanation of the scope of services that are appropriate for the Military OneSource Members.
- Clarification that referrals to a Military OneSource Member will not be made until the provider has successfully completed the military culture training (outlined below).
- An addendum outlining the provisions of participation in serving the Military OneSource Members, which will require a signature and return to ValueOptions.
- An explanation of the unique training requirements associated with the Military OneSource program.

Providers will be required to complete a comprehensive military cultural competency on-line training program described below. Upon satisfactory completion of the training, providers will receive CEUS, a certificate verifying successful training was completed, and be eligible to receive referrals for Military OneSource Members.

Essential Learning Web-based Training Resource
ValueOptions uses Essential Learning, an online behavioral health training provider service, as a primary component of our training platform for network providers. Essential Learning serves more than 500 agencies and is the largest provider of e-learning services for the behavioral health, mental health, child welfare, and human service industry. We have partnered with Essential Learning to provide services for several of our clients and can offer these innovative services to Military OneSource.

Essential Learning is a completely Web-based application, no application software is installed on the provider side and all application activity occurs on a Web browsers. The service offers an extensive online course library on mental health, addiction, and many other materials. Through this portal, ValueOptions can upload training materials including PowerPoint, audio and video presentations for provider staff to view and complete from any location with Internet access. The users who complete the training can be tracked and reported on for each facility. We have integrated the outcomes and measures from Essential Learning into our overall reporting structure.

All training is customized to meet the unique programmatic needs of the provider (e.g., varies by level of care and services offered) and highlights expectations for ongoing monitoring to assure quality of care to Members. The training sessions for new providers address the following key areas:

- Program Overview
- EAP Overview
- Network Training Segment
- Invoice Training Segment
- Quality Management
- Question and Answer Period

Evaluating Training Programs. The ValueOptions Team requires participants to complete a pre/post test or to complete an evaluation form to evaluate all our training and education sessions. Results are compiled and analyzed; as necessary, additional training is scheduled. Occasionally, a situation may

arise that requires immediate communication with our entire provider network. In those cases, we initiate a communication campaign including but not limited to postcard, e-mail, and fax notification, based on the provider's communication preference recorded in the NetworkConnect system.

Military OneSource Specialized Provider Training. Prior to seeing a Military OneSource Member, providers will be required to complete an Essential Learning Module on Military Cultural Competency. The goal of this workshop is to introduce basic information that will better equip providers to engage in treatment with this important ~~patient~~ population. At the completion of the training program, providers will be able to:

* explain the military rank structure and organization and distinguish the primary mission and core values of each branch of service
* describe differences and similarities between the Active and Reserve components
* discuss demographic characteristics of service Members
* recognize general and deployment related military terms

Handling of Adverse Incidents

ValueOptions Provider Handbook specifically addresses expectations that EAP Affiliates immediately report to ValueOptions all adverse incidents and cases which are potentially threatening to the participant, the client, or the EAP. Examples of adverse incidents include, but are not limited to, self-inflicting harm requiring urgent or emergent treatment, violent/assaultive behaviors with physical harm to self or others requiring urgent or emergent medical intervention, or any other occurrences representing potential or actual serious harm to a Member. This requirement is reviewed with providers as a part of their orientation to the Military OneSource program. In addition, ValueOptions maintains an Adverse Incident Committee (AIC) which is a multi-disciplinary sub-committee of the Company Quality Council. At the request of the National Legal Counsel, the Company Quality Council has delegated to the AIC the authority to:

* monitor and oversee the function of the ValueOptions QualityConnect application
* review adverse incident aggregate and trended adverse incident aggregate data
* review of adverse incident Executive Summaries as prepared by the National Quality Department
* evaluate the implication of aggregate reports of incidents and quality of care issue trends for the service delivery system, individual service centers, divisions and the company as a whole
* evaluate adverse incident and quality of care data in relation to the context and other variables (e.g. incidents/quality of care issues per 1,000 covered lives)
* recommend performance improvement for service centers in relationship to untimely reporting, or other parameters as identified by the AIC
* recommend policy and system enhancements to the Company Quality Council and the Executive Medical Management Committee as appropriate
* monitor service center aggregate data to ensure participant safety issues are adequately addressed
* ensure service centers are adhering to adverse incident reporting policies and procedures
* promote ~~patient~~ participant safety

ValueOptions ensures that the existing policies are adhered to in terms of internal protocol and practices in the identification, tracking and resolution of issues pertaining to adverse incidents. In addition, we collaborate with the Military OneSource Program Office to validate the expectations and process for proactive notification of such incidents. It is our intent to notify the government promptly of any potential adverse incidents to allow for effective communication to all parties.

PWS 5.0.9.2.1 TRAINING ON CURRENT/ EMERGENT MILITARY LIFE ISSUES

As a part of the ValueOptions Team's ongoing provider training, we will pay special attention to reviewing military related topics with our provider community to provide them with current and relevant information about the Military OneSource population. Our Military OneSource program management team stays abreast of the issues facing Service Members and their dependents, and relay this information to our providers on a regular basis through a variety of mediums as described above in our training section **(See section 5.0.9.2).** Ongoing training is a regular activity within the ValueOptions Team in response to internal process changes, network updates, program changes and workgroups. Additional training occurs at a regular frequency as needs are identified through quality audits, inquiry audits, workgroups, or as a result of corporate procedural or client-specific change requests or updates. The ValueOptions Team brings our proven processes to the Military OneSource program and ensures staff training is an integral and ever-evolving activity throughout the life of the contract. To ensure that providers are unbiased about treating Military OneSource Members, we regularly monitor their acceptance of these referrals. Should a trend arise that suggests a provider is uninterested or unwilling to accept a Military OneSource referral, we will contact the provider in question to address this concern, and if warranted, remove them from our referral source listing.

In addition, the CEU programs offered through Essential Learning referenced in **Section 5.0.9.2** above are highlighted for the provider network and assigned to providers to complete as a part of their participation with the Military OneSource network.

PWS 5.0.9.2.2 REQUIRED TRAINING

We confirm that all required training, including subject matter tests, are completed successfully prior to being referred to or working with a Military OneSource Member. As required, the training is renewed on an annual basis.

We share DoD's commitment to providing timely, effective assistance to Members seeking our services and ensure that our training programs provide our staff and providers with up-to-date training that enhances the care provided.

PWS 5.0.9.2.3 STAFF AND PROVIDER TRAINING

ValueOptions confirms that we annually certify and are able to demonstrate (at any time) to the Government Military OneSource Program Office or the contracting officer, in writing, that the Military OneSource staff and network providers and supervisors have comprehensive/current knowledge of the scope of practice, overall military culture, issues affecting military families, and all requirements of this contract.

PWS 5.0.9.3 ADVOCACY KNOWLEDGE, SKILLS AND ABILITIES

The EAP provider network is composed of counselors who serve a diverse population and whose skills in sensitively responding to individual counseling needs is confirmed through feedback we receive from participants. These counselors provide services to all walks of life, all social strata, and individuals with a wide range of everyday life issues. ValueOptions standard requirements for counselors identify the

expectation of adhering to the professional ethical guidelines and responding to crises in accordance with the guidelines specified by their licensing entity. In addition, the ValueOptions EAP handbook, available at www.valueoptions.com, further elaborates on expectations of counselors in managing the variety of concerns for which individuals seek non-medical counseling through the EAP.

To enhance the delivery of services to the Military OneSource participants, ValueOptions has customized authorization letters sent to counselors in order to highlight the unique features of the Military OneSource program, such as the Military OneSource website. EAP counselors are generalists who focus on non-medical issues and have gained familiarity in linking individuals to non-medical services such as local support groups and community programs. In support of these linkages, ValueOptions provides active consultation and assistance to counselors regarding resources available through Military OneSource and offers to identify specific resources should they be working with a Service Member or family member who requires additional assistance.

PWS 5.0.9.3.1 NETWORK PROVIDER HOURS

Our network of providers is available to meet Member's needs. Many of our network providers offer evening and weekend hours to accommodate our Members.

PWS 5.0.9.3.2 PROVIDER KNOWLEDGE OF AVAILABLE RESOURCES AVAILABLE THROUGH MILITARY ONESOURCE

ValueOptions confirms that our network providers are knowledgeable of the resources available through the Military OneSource website and provide timely customized information referrals to Members. Our comprehensive provider training services gives providers an understanding of the website and how to access the services available to them. The information is available through our ProviderConnect provider website, and through the Provider Manual.

PWS 5.1 REQUIREMENTS FOR ALL TYPES OF NON-MEDICAL COUNSELING

Our extensive provider network offers access to a national network of non-medical counselors for all Service Members and their family. We establish protocols and procedures related to training and credentialing so that our providers maintain the highest degree of sensitivity, compassion and respect for both Service Members and their families.

PWS 5.1.1 FREE FROM BIAS

As a result of our many years of service to military personnel and their families as well as the Government, we understand the need for us to remain free of any political bias and we commit to the consistent delivery of services regardless of installation, location, or any other factor.

PWS 5.1.2 CAPTURING DATA AND REPORTING ON NON-MEDICAL COUNSELING

All metrics described in the Quality Assurance Surveillance Plan (QASP) will be captured and reviewed by the Military OneSource program leadership for analysis and compliance purposes. All metrics, including demographic and eligibility information, is securely stored in our CONNECTS system which

allows us to provide monthly reports detailing all contacts and services provided, including non-medical counseling services, the duty status and rank of counseling participants, type of counseling received (e.g., parenting, financial, grief and loss, etc.), the number of sessions received, the distance of the counselor used from the residence of the participant receiving services, and other data elements as required by the government. Our Military OneSource staff will be fully trained on each of these reporting elements as a part of their initial orientation, and their adherence to this requirement will be a part of their annual performance appraisal criteria.

PWS 5.1.3 EMERGENT, URGENT, AND ROUTINE CALLS

The ValueOptions Team has rigorous and well-established processes and procedures for responding to emergent, urgent, and non-urgent calls. The ValueOptions Team's call handling procedures include an immediate response for emergency situations, access to non-medical counseling within one business day for urgent calls, and access to non-medical counseling within three business days for non-urgent calls. Based on the Military OneSource Consultant's assessment, a Service Member or family member situation will be deemed emergent, urgent, or routine and handled according to the guidelines described in the following paragraphs. We include the call center schematics at the conclusion of this section. Service Members reporting issues requiring medical intervention will be warm transferred to the appropriate TRICARE regional contractor or other service provider, as appropriate.

Emergent. If the Military OneSource Consultant determines the caller's symptoms to be emergent/critical in nature, another Consultant or Telephonic Counselor will join the Consultant to help stabilize the Service Member and to manage the process according to established emergency protocols. The Military OneSource Consultant will maintain contact with the Service Member until safety is assured. For emergency situations, the Service Member will be directed to an emergency room, either at the nearest Military Treatment Facility (MTF), or if an MTF is not located near the Service Member, to a civilian hospital. In some incidences, local authorities will need to be contacted by a Military OneSource staff member to help stabilize the situation. At this point, the authorities will transport the Service Member to the most appropriate facility. The Military OneSource Consultant will follow up with the facility where the Service Member is to ensure he or she was assessed. This follow-up call to the medical facility will occur within one hour for life-threatening emergencies, and six hours for non-life-threatening emergencies. A detailed accounting will be recorded in the care management record in the CONNECTS system.

Urgent. If it is determined that the Service Member's situation is urgent, the Military OneSource Consultant will facilitate, via a three-way call, the scheduling of a face-to-face problem solving counseling session (or telephonic counseling session, depending upon the Service Member's preference or clinical appropriateness) within one business day, usually while the Service Member is on the telephone. On the day of the appointment, the Military OneSource Consultant assigned to the case will attempt to follow up with the Service Member to confirm that he/she kept the appointment and to assess if any other services may be required. If the Consultant is unable to reach the Service Member, he/she will make two more subsequent attempts. If the Service Member still cannot be contacted, the Military OneSource Consultant will contact the Counselor to determine if the Service Member arrived for the appointment. A detailed accounting of these outreach efforts will be recorded in the care management record in the CONNECTS system. If the first EAP provider is unable to schedule an appointment at the time of the warm transfer, the Military OneSource Consultant will initiate an immediate appointment

search to identify an alternate provider who can see the Member within one business day. Moreover, telephonic counseling may also be offered as a bridge to face-to-face services in order to provide support and immediate assistance to the caller. The Military OneSource Counselor will use motivational interviewing techniques to engage the caller, and assuming the caller's service requests are within scope of the Military OneSource program will provide telephonic support while other support staff continues to find provider availability for an urgent referral.

It is not uncommon for an individual to reach out for crisis services and then to resist recommendations when their situation requires intervention, such as transport to an emergency room. As a matter of course in a telephone interaction, the Military OneSource Consultant will request a call-back number and address at the beginning of each call. If a call is identified as being an emergency, the Military OneSource Consultant will encourage the caller to identify a friend or family member who can provide transportation. If that suggestion is rebuffed, Military OneSource staff will either contact local EMS or police. If the caller is at a military installation, the Military OneSource staff will follow the protocol established for responding to emergency needs. Clinical supervisory staff are consulted in all decisions that involve over-riding confidentiality and activation of emergency resources without the individual's consent. Whether intervention occurs by EMS staff or on the base, Military OneSource Consultants will maintain contact with the caller until safety has been confirmed and professional evaluation is secured. Military OneSource staff will follow-up with the individual to offer ongoing support and resources to help re-establish effective functioning. These resources will also be offered to family members to assist with the stress placed on them during the crisis.

All provider network affiliates may be asked to handle emergency appointments on an immediate basis, and urgent assessments within one business day of the request. Network affiliates are required to provide 24-hour service or ensure that a Service Member can access services at an alternate location after-hours. In addition, each affiliate is contractually required to remain available to handle emergencies. If the Service Member presents with a medical emergency, the EAP Affiliate would ensure the Service Member gets to the nearest emergency room for treatment.

Routine. If it is determined that a call is of a routine nature, the Military OneSource Consultant will assess the Service Member's needs and assist them in obtaining an appointment with a network provider or a Military OneSource Telephonic Counselor (depending on preference and clinical appropriateness) within three business days. The Military OneSource Consultant will conduct a warm transfer (no-hold transfer) of the caller to the appropriate resource. This allows us to maintain continuous contact with the caller while a linkage to an appropriate resource can occur. All routine calls will be flagged with the appropriate follow-up standard, provided the Service Member agrees to be contacted. For both urgent and routine cases, should a Service Member fail to show up for their scheduled appointment, the Military OneSource Consultant will contact him/her to ensure their safety and well-being.

Our staff receives ongoing training on how to handle any of these situations when they arise. Our CONNECTS system provides the ability to apply the appropriate risk ratings to the initial assessment of the Military OneSource Service Member. The system will prioritize the call based upon the risk rating and automatically route the inquiry to the Military OneSource Consultant for appropriate action and follow-up. The flow chart below depicts our call triage process.

Call Triage Process

SOURCE SELECTION INFORMATION–See FAR 2.101 and 3.104
Use or disclosure of data contained on this sheet is subject to the restriction on the title page of this proposal.
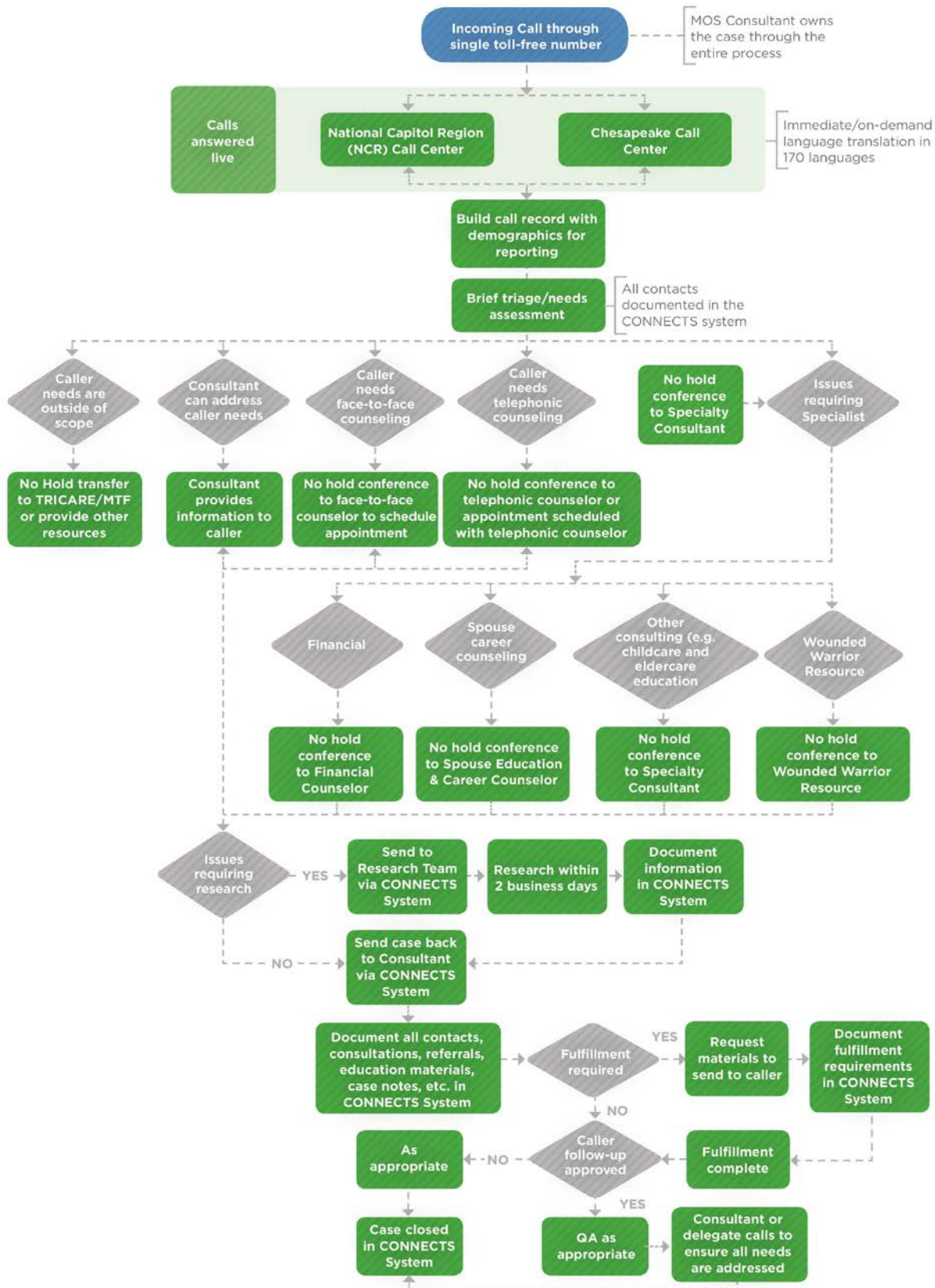
PWS 5.1.4 APPROVAL FROM GOVERNMENT

ValueOptions recognizes that the ultimate authority and approval of all policies and protocols for non-medical counseling needs to occur with the Government Military OneSource Program Office. Our goal is to be a good partner, delivering the services as the Government Military OneSource Program Office has envisioned. ValueOptions will continue to work with the Government to clearly define who needs to review and sign off on specific documentation.

PWS 5.1.5 ADHERE TO WRITTEN PROTOCOL

ValueOptions agrees to adhere to written protocols for every type of service delivery. Moreover, if these protocols were to change at either the request of the Government or the recommendation of ValueOptions, we would seek the Military OneSource Program Office's approval prior to any change.

PWS 5.1.6 PROVIDER RECRUITMENT

Infrastructure for National Network Development. Network development is a dynamic process that involves both initial and ongoing assessment to ensure adequate provider coverage, counseling access, and Member choice. To meet the provider access needs of all Service Members, regardless of their location, our staff continuously review available data and inquire about any special access needs that are identified. This information is in turn shared with our national network management team to initiate recruitment of providers in any deficient areas. Should we be unable to fulfill a referral request in a remote area, we keep track of that in our CONNECTS system and immediately implement a corrective action plan to recruit providers in that specific area. We look at the ZIP codes of those hard to reach areas of the country based on calls received and track our progress on a weekly basis as a part of our quality management plan. These incidents and actions steps are reviewed regularly with appropriate individuals (in the case of Military OneSource, MC&FP designated program staff and the COTR). During implementation and throughout the course of the contract, the ValueOptions Team will routinely review our network coverage so that, as the Service Member base changes, the national network reflects its size, location, and diversity. The ValueOptions Team also uses our provider database technology with the following features and benefits:

- automated tracking of expired documents (e.g., malpractice and licensure) and key timeframes (e.g., re-credentialing cycles) to assure accurate, up-to-date provider information for referral and invoice payment
- in-bound and out-bound communication technology via multiple methods (e.g., e-mail and fax) helping to maintain provider data accuracy without disrupting the provider's practice
- secure multi-user, multi-location access to provider file data to assure accurate and timely information is available to all the ValueOptions Team locations
- audit module which allows remote access to identified provider files and key elements allowing audits to occur efficiently (i.e., without travel or movement of hard-copy files) and effectively (focused on elements of interest)
- ability to complete audits on-line via access to the provider file technology
- workload management capabilities that support shifting of work as necessary to meet deadlines and expedite provider credentialing

PWS 5.1.7 MANAGING NETWORK PROVIDERS

Provider Management. The ValueOptions Team performs random provider audits and satisfaction surveys to ensure appropriate and high quality service. Specific monitoring of our providers for Military OneSource will be a continuing practice throughout the program. Monitoring methods include Member feedback, clinical notes, access standards and key quality measures as outlined in the QASP. The ValueOptions Team's provider management system, NetworkConnect, supports all the provider management activities (including network maintenance, credentialing, reports, and inquiries). The following data elements can be used to search for provider information:

- Unique NetworkConnect provider number
- Provider Name
- Unique NetworkConnect vendor (practice location) number
- Vendor Name
- Tax ID number
- Social Security Number
- Alternative identification number
- Pay to vendor (billing office)

- Provider type
- Network Status
- Provider modality
- Zip Code
- Treatment Population
- Demographics
- Clinical Specialty
- Handicapped Accessible and Public Transportation Accessible

The ValueOptions Team has developed policies and procedures regarding disciplinary review of our providers and ongoing disciplinary sanction review. Our National Credentialing Committee (NCC) reviews the disciplinary history of each practitioner prior to approval in our network.

PWS 5.1.8 COMPLIANCE WITH DOD DIRECTIVES AND INSTRUCTIONS

ValueOptions agrees to comply with all DoD directives and instructions including all future program updates as referenced in **Section J, Attachment 11**.

PWS 5.1.9 STAFF AND PROVIDER COMMUNICATION WITH MEDIA AND PRESS

ValueOptions recognizes that all Military OneSource staff and providers must refrain from speaking with the media on any issues pertaining to the Military OneSource program, or engaging in any political discussions with clients including anything that could be perceived as military policy. Our first and foremost goal is simply to serve the needs of the military and their families and to do so in a non-bias, supportive manner.

PWS 5.1.10 PROVIDER CITIZENSHIP AND LANGUAGE REQUIREMENTS

ValueOptions confirms that all of our staff and network providers who provide services for Military OneSource will be U.S. citizens and will speak English.

PWS 5.1.11 PROVIDER AVAILABILITY

ValueOptions confirms that our network providers will be available by telephone enabling counseling participants to schedule an appointment for Military OneSource services.

PWS 5.1.12 TRANSPORTATION

ValueOptions Military OneSource staff and providers will never transport a Military OneSource Member in any vehicle. If transportation is required as part of service delivery, we will help facilitate public transportation only.

PWS 5.1.13 VERIFYING ELIGIBILITY

ValueOptions' Military OneSource staff and providers will verify eligibility by requesting to view a military identification card when appropriate. In addition, the Military OneSource Consultants/Counselors will also utilize the eligibility matrix.

PWS 5.2 OBJECTIVE FOR PROBLEM SOLVING COUNSELING ONLY

ValueOptions will adhere to the Government's Military OneSource Program Office staff expectations around short-term, problem solving non-medical counseling. We will provide motivational counseling and support to empower individuals to make the types of lifestyle or personal changes necessary to achieve their desired goals. This will also include psycho-educational support as well as problem solving with the individual in an effort to remove any perceived barriers or challenges. All non-medical counseling will be conducted in a confidential and supportive environment and will not include the provision of therapy or other services involving a DSM IV diagnosis or requiring a higher level of care as these cases will result in a referral to TRICARE or a military treatment facility.

PWS 5.2. 1- MINIMUM REQUIREMENTS FOR PROBLEM SOLVING COUNSELING ONLY

Throughout our history of providing EAP services, we have maintained the highest standards of qualifications for our counseling staff. Military OneSource non-medical counselors have a minimum of a master's degree in a mental health related field, such as social work, psychology, marriage and family therapy or counseling psychology from an accredited graduate program, and will be licensed by the state as confirmed through primary source verification. They are required to have had a minimum of three years of direct counseling experience and assurance that they meet the standards of professional and ethical conduct prescribed by their particular discipline or licensing board, which is monitored through supervision and through continued licensure verification. The following expertise is required of all counseling staff: assessment and diagnostic skills, familiarity with worksite issues, clinical experience in substance abuse assessment and referral and training in focused, short-term non-medical counseling. Providers who are participating in the network serving Military OneSource are also be required to have completed at least one Introduction to Military Culture training prior to rendering services to Military OneSource Members. Our network providers are independent health care professionals who maintain their own active practices. All network providers must maintain current information supporting their qualifications for their specific area of work to remain in the network.

PWS 5.2.1.1 PROVIDER SUPERVISOR EXPERIENCE

Supervision of providers is delivered in two ways:
1. Through collegial case consultation whenever an EAP counselor encounters a dilemma in providing services to a Member and seeks assistance by contacting the referring Military OneSource

Consultant. This type of case consultation generally focuses on issues such as resource identification, clarification of processes, or assistance in determining whether non-medical counseling is appropriate.

2. Formal supervision by one of the Quality Auditors or Clinical Supervisors is delivered in response to adverse incidents, service delivery complaints, or in assisting a counselor with a particularly difficult case in which risk factors may be present. All staff providing this type of formal supervision have at least five years of clinical experience, are licensed, are knowledgeable about military protocols and culture, and have extensive EAP training which guides their focus to the non-medical aspects of counseling. Both formal and informal consultation and supervision is a key component of the relationship ValueOptions maintains with its network providers as they deliver counseling services to Members of the Military OneSource program.

PWS 5.3 OBJECTIVE FOR FINANCIAL COUNSELING ONLY AND SECTION L17, FACTOR 1, 2.B

ValueOptions recognizes that the goal of financial counseling is to assist Service Members and their families with personal financial readiness, money management, financial counseling and financial planning to include appropriate guidance regarding the Service Member's Civil Relief Act, Public Law 110-289 Housing and Economic Recovery Act of 2008 as well as other pertinent laws and policies. There will be no barriers to access this information or service and all resources will be appropriately credentialed.

PWS 5.3.1 REQUIREMENTS FOR FINANCIAL COUNSELING ONLY

ValueOptions has a long-standing relationship with Workplace Options (WPO). We selected WPO to provide telephonic financial counseling as they have a demonstrated track record with high customer satisfaction ratings and will also provide expertise in the area of Work/Life assistance. WPO's financial counselors follow government guidelines regarding employment and conflict of interest. In addition to Military OneSource, WPO currently provides telephonic financial counseling services and their client base includes State and Federal governments and municipalities, Fortune 100 Companies, and national associations. WPO financial counselors have strong communication skills, as well as skills in assessment and advocacy. Prior to being eligible to work with Members, counselors must have a minimum of 2-3years in practice within the financial services industry and maintain a disciplinary free record with their licensing/certification authority. In addition, the Military OneSource financial staff and network providers delivering financial counseling have a minimum of a Bachelor's degree and 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). Further, counselors are identified based upon their ongoing commitment:

- to assure compliance with established standards of adult instruction
- to advance professionalism in financial education
- to enhance the value of the educational process

Ongoing annual credentialing process with each of the WPO providers includes:

- primary source verification of licensure/certification, educational background, professional liability insurance, and good standing with licensing/certification authorities
- background and reference checks

Specifically, WPO's certified counselors work with the Service Member to assess their needs and then provide the proper level of assistance. This includes, but is not limited to:

- identifying primary cause(s) of the Member's financial problem, including any automobile loan delinquency/repossession, and/or housing situation
- identifying the Member's financial goals through sensitive discussion
- completing the current monthly budget (includes all living costs to be examined jointly)
- listing the Member's monthly creditor obligations, including housing expense and automobile loan(s) as provided by the Member
- providing an overview of all options available to the Member and a recommendation of which option is most viable for his/her individual situation; and, if appropriate, a comparison of payments with or without a debt management plan (DMP) for unsecured debt
- taking specific action steps necessary to accomplish the recommended option, documented in a written action plan containing reachable objectives

providing educational resources and other appropriate referrals for assistance, as indicated
Both financial planners and financial counselors provide a variety of services, including money management, financial stability, banking, credit management, saving and investments, budget counseling and education, and debt management plans.

PWS 5.3.1.1 DOD INSTRUCTION NO. 1342.27

The delivery of financial counseling services for the Military OneSource program will adhere to the PWS requirements regarding the DODI number 1342.27. Standardized personal financial management programs are designed to assist a Member and support their needs throughout their military career as well as to promote their retention in the military. Military OneSource financial staff maintains 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). All face-to-face counseling will be provided by financial experts certified by the National Foundation for Credit Counseling (NFCC). These financial counselors help Members learn skills like maintaining a budget, checkbook management, saving and investing, credit and debt management, home buying, and car buying. Our financial experts can help the Member develop a financial plan for special circumstances such as station moves, extended absences or changing family needs. Telephonic financial services include, but are not limited to the following: general tax information; financial planning, investment strategies; and family budgeting and debts. Our services present strategies for the Member to plan financial matters and do not include tactical advice. Issues that financial advisors can assist Members with include, but are not limited to:

- Bankruptcy
- Debt Management
- Loan Consolidation and Repayment Plans
- Personal Budgeting
- Investment Planning
- Debt Collection
- Savings and Strategies
- Consumer issues

- Garnishments
- Retirement Planning
- Tax Planning
- Tuition
- Mortgage Refinancing
- Housing Counseling/Foreclosure
- Inheritance

PWS 5.3.1.2 TELEPHONIC AND FACE-TO-FACE COUNSELING

We confirm that financial counseling services will be provided telephonically or face-to-face, and whenever possible utilizing a planned meeting approach to service delivery.

PWS 5.3.1.3 REFERRALS TO APPROPRIATE MILITARY RESOURCES

ValueOptions will work closely with the Military OneSource staff to make sure that we maintain the latest database of military resources to assist Members who are in extreme financial hardship. WPO financial counselors will utilize that database as well as their extensive database of community resources to assist the military Members and their families.

PWS 5.3.1.4 ACTIVITIES AND SERVICES PROVIDED

Military OneSource Members are entitled to receive a telephonic financial consultation from an individual who holds 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). This consultation is available for personal financial issues including personal budget planning, savings strategies, tax preparation, child support, saving for college, retirement planning, and many others. The result of this initial consultation will generate further activities designed to enhance financial stability for the Military OneSource Member, such as family budgeting programs, debt consolidation, or, in some cases, referral to an attorney.

The financial counselor will take special care to remind the Military OneSource Member of any military or legal ramifications of indebtedness and offer additional resources if necessary.

The financial counselor will also help the Military OneSource Member take advantage of the numerous resources available on the Military OneSource website. The site includes access to a large array of easy-to-use calculators to assist Military Members and their families in making sound financial decisions. Whether making decisions regarding relocation issues, buying a house or car, boosting retirement savings or paying off credit card debt, these online tools take the guesswork out of money management. The financial counselor will add any expert guidance needed for the Military OneSource Member to make a sound decision. The financial counselors will also guide Military OneSource Member to resources that may be specific to the military such as the Thrift Savings Plan, the Savings Deposit Program and other Morale, Welfare and Recreational programs.

PWS 5.3.2 MINIMUM REQUIREMENTS FOR TAX FILING SERVICES

Both NFCC's and WPO's financial counselors provide all financial counseling services identified in the Military OneSource RFP. WPO staff members have at least one of the following credentials: 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). In addition, tax filing services will be performed by H & R Block, the premier online tax preparation service. H&R Block Tax has more than 90,000 trained tax professionals who stay abreast of all tax law changes through more than 50 hours of training annually.

PWS 5.3.2.1 TELEPHONIC TAX ASSISTANCE COUNSELING

Military OneSource Members will be able to obtain any and all of the telephonic services related to tax filing, including advice, consultation and preparation of State and Federal tax forms. The tax advisors have the following credentials: Accredited Tax Preparer, Professional Tax Preparer, and/or Licensed Tax Preparer (Licensed Tax Preparer is required in California and Oregon).

PWS 5.3.2.2 FREQUENTLY ASKED QUESTIONS

There are numerous sources for FAQ's relating to income taxes, however, perhaps the most reliable is the FAQ'S provided by the Internal Revenue Service on their website http://www.irs.gov/faqs/index.html. Military OneSource Members will be directed to that website as appropriate.

PWS 5.3.2.3 LOCAL MILITARY INSTALLATION TAX SERVICE SUPPORT

Using a Government provided list of locations that have tax services available, we will refer Members to those specific resources whenever appropriate or requested.

PWS 5.3.2.4 QUALITY CONTROL PROCEDURES

WPO has an extensive quality assurance program which utilizes quality metrics that are reviewed monthly with each individual staff. A portion of the staff's compensation is tied directly to meeting or exceeding all quality standards. Any potential deficits identified are integrated into the staff's training program. In addition to utilizing silent monitoring and recording of all Member service calls, WPO requires specific extended and continuing education of their financial and tax professionals. Through these ongoing requirements, tax professionals are kept abreast of the various nuances that may apply to the tax filing requirements as well as deductions that may apply to specific segments of our population.

PWS 5.3.2.5 MONTHLY STATUS ON USAGES

ValueOptions will provide monthly status on usages as well as cumulative usage for State and Federal filings. The data will be reported in accordance with the Monthly Status and Progress report requirements detailed in the Deliverables table. Government approval of the tax assistance support plan will be obtained prior to implementation.

PWS 5.3.2.6 TRAINING FOR COUNSELING STAFF

As stated above, all of the WPO staff tax professionals are required to successfully undergo the annual continuing education curriculum required by their certification body.

PWS 5.3.2.7 MAXIMIZING TAX REFUNDS

WPO tax specialists are able to help Members to ensure that they are taking maximum advantage of the deductions and strategies available to them. As an example, some U.S. tax filers have portions of their income that are exempt from State and Federal income taxes. Others have business (work) related deductions that are more generous than most. When a tax refund is anticipated, the tax professional can offer a referral to a financial consultant to discuss the most advantageous use of the tax refund and assist the caller in identifying gains from judicious use of the tax refund.

PWS 5.4 OBJECTIVE FOR HEALTH AND WELLNESS ONLY AND SECTION L17, FACTOR 1, 2.C

We confirm that telephonic health and wellness coaching will be provided to Service Members and their families through the Military OneSource program, and will be designed to educate and assist Members in maintaining physical fitness, establishing healthy eating habits, and improving their overall health. The focus will be on fitness and exercise, diet and eating, health and goal setting, outreach, and engagement.

PWS 5.4.1 MINIMUM REQUIREMENTS FOR HEALTH AND WELLNESS ONLY

As a significant part of our EAP services, we offer telephonic health and wellness coaching services provided by a coach who possesses at least a Bachelor's degree from an accredited college program in a mental health-related field, and who has demonstrated current coaching competence before joining the Military OneSource program. Our health and wellness coaching services encompass such issues as fitness, exercise, diet/eating habits, nutrition, life health assessments, outreach and engagement, and goal setting. When a Service Member or family member requests health and wellness coaching we offer them the opportunity to complete the Member Health Profile. Based on the Profile, the Military OneSource Consultant can offer telephonic access to a health coach, various health and wellness tools and services including Achieve Solutions content, an extensive health assessment catalog, a world class evidence-based health encyclopedia, disease and condition fact sheets, disease and condition centers, procedures and tests, health and wellness centers, natural and alternative healthcare centers, medication centers, interactive tools, a medical dictionary, and access to a selection of five online health and wellness programs which in turn can be pushed to the Members who can follow two paths to the integrated proprietary program:

- Self-Directed – Once the Member Health Profile is generated the Member will proceed in a self-directed manner utilizing the user-friendly and highly intuitive logic sequence through a predetermined set of fully integrated content tools and services.
- Health and Lifestyle Wellness Coach Led – Once the Member Health Profile is generated and the Member is eligible for telephonic coaching, the Member will be contacted within a 24-48 hour period by one of the Military OneSource coaches trained in Health and Lifestyle Wellness coaching

to review the results of the Member Health Profile and begin to design a Plan for the Member based on their personalized Health Profile. The coach will also lead the Member through an orientation of the content tools and services and direct them on how to maximize the value of each component.

PWS 5.4.1.1 ACCESS TO COACHING SESSIONS

ACCESS TO HEALTH AND ~~LIFESTYLE~~ WELLNESS COACHING

Our Health and Wellness coaching assists Service Members and family members to resolve the gap between where they are now and where they want to be in the future. Health and Wellness coaching is a powerful means to develop human relationships and support people as they create a more balanced and productive life. Coaches employ multiple Member-centered approaches, including Motivational Interviewing and Positive Psychology. Members who want to make a lifestyle change (e.g.,~~i.e.~~ weight loss, ~~smoking cessation, time management, organizational skills,~~ and improved health and wellness) will benefit from the telephonic ~~life~~ coaching services. Health and wellness coaching includes fitness and exercise, diet and eating, nutrition, health and goal setting, outreach and engagement and will be available to Members both telephonically and through the web.

ACCESS TO WEB-BASED PROGRAMS

The ValueOptions Team will also offer Military OneSource Members a comprehensive health and wellness Web-based portal that can be reached through the interactive Life Coach website, www.lifecoachconnect.com, or the interactive Wellness website, www.achievesolutions.net. Our health and wellness portal will offer Military OneSource Members effective, successful lifestyle management solutions to successfully achieve and maintain lifestyle goals. Each of the programs ~~are~~ is private and entirely confidential as well as personalized and interactive. All materials are relevant, valuable, and meaningful keeping participants more engaged and dedicated to the program.

Online Coaching — Interactive Web-based Lifestyle Behavior Change Program. Life Coach Connect personal telephonic and Web coaching service will allow Military OneSource Members to work with their own Personal Coach, who is a certified, experienced professional, to improve various aspects of life related to ~~emotional health and well-being, financial management, career growth, parenting skills,~~ weight loss, nutrition, and other health and wellness issues. ~~stress reduction, and more.~~ Through this program, a dedicated Personal Coach will work one-on-one with Members to help them develop inspired solutions for the challenges that keep them from living their most fulfilled lives. The length of time of the Coaching Program varies for each participant. Each participant identifies the time frames in which they will meet their goals.

ACHIEVE SOLUTIONS (MILITARY ONESOURCE EAP WEBSITE)

Our award winning website, Achieve Solutions, has content is continually updated to reflect new research, articles and topical material. Military OneSource Members may navigate the website anonymously or may choose to initiate a "call back request," whereby a clinically trained professional will contact them to provide added guidance or assistance. Achieve Solutions is a VeriSign secure site, which means that all traffic to and from the servers is encrypted. We provide the following Web-based Health and Wellness components through the Achieve Solutions Web portal.

Web-based Health and Wellness Components of the Achieve Solutions Web Portal

Achieve Solutions Web Component	Description
Interactive tools	Quizzes -- Achieve Solutions incorporates quizzes and other interactive tools for visitors to provide educational information on conditions like ~~depression, alcoholism, and~~ body image/eating disorders, as well as personal concerns, including relationships, time management, and stress. In a private environment, Members can participate in self-evaluations to determine their personal health risk.
Health literature	Achieve Solutions' Health and Wellness Library -- The interactive content contains physician-reviewed text, 3D graphics, animation, and streaming media to create health and wellness information solutions that offer a unique "visual learning" experience.
Search capabilities	All pages on the Achieve Solutions site have a space for the user to type in a topic or word and search for information.
Wellness information	Achieve Solutions content is organized into information centers Continually expanding, the site today includes more than 46,000 content items across more than 200 topic areas.
Disease and condition information	**Health News and Articles**—Members will be able to read the latest health news and articles. **Health Channels**—Members can research health information and news that are focused on a specific area of health. **Diet, Nutrition, and Fitness**—Members can plan and track their diet, nutrition, and fitness needs with state of the art interactive programs.
Symptom checker/Self-care feature	**My Health—**Members can track their health and care through this personalized feature. **Interactive Anatomy Tools**—This option allows Members to learn more about their bodies with these detailed interactive multi-media tools.
Healthy behaviors information	The field of disease management has grown rapidly in the past several years, while online disease management tools have become the cutting edge of modern medical management. Using our Web-based disease management tools, Military OneSource visitors can learn a great deal about what their symptoms mean and how to care for them, both on their own and with professional help when needed.
Medical encyclopedia	**Reference Library**—This option offers Members the opportunity to browse an extensive, multi-discipline reference library. **Health Illustrated Encyclopedia**—Members can browse an award-winning encyclopedia of health information.
Drug encyclopedia	**Medications—**Members can browse adult drug and pediatric drug database.
Personal medical record	**Interactive Health Assessments**—A Member can assess his or her health and obtain multi-disciplinary recommendations.
Complementary Therapies	Our Health and Wellness services offer a blend of Western and Eastern medical philosophies and presents alternative therapies, treatments, and resources to more common practices.
Recommended preventive screenings	Preventive screenings are recommended as part of the interactive web self-assessments available on Achieve Solutions. There are several types of assessments available, each offering recommendations that includes information such as: recommended preventive screenings, self-treatments, lifestyle suggestions, consideration of natural health products, and performing additional assessments. In addition, featured articles on Achieve Solutions offer health care information that encourages preventive screenings.
Videos	The multimedia center provides over 50 files of streaming audio and video information on health and wellness topics.

Evidence-Based Health and Wellness Content. The Achieve Solutions Health Library is the ideal resource for Military OneSource Service Members and their families to learn about health and wellness matters.

Content Editorial: All of the content in the Health Library is written for the lay reader and is organized in the way that most individuals seek information. It supplements and expands upon information given by healthcare professionals. The articles in Health Library reflect national clinical practice guidelines and are free of racial, gender or other bias. All of the evidence-based content included in the Health Library is written by experienced health and medical writers and independently reviewed by medically credentialed experts.

The Achieve Solutions website features a vast database of content, which has varying copyright owners. It is our understanding that any content that ValueOptions develops at the government's request and with government funds will have a government copyright. Our current database of content will retain the ownership indicated on each content record.

A user may print or download and distribute to his or her command base any content from the Achieve Solutions website, provided that the copyright owner is listed on all documents that are distributed. We encourage such redistribution by key stakeholders as the information will receive a higher level of attention, helping us reach our mutual goals for providing useful, actionable information and increasing awareness of services.

PWS 5.4.1.2 LIFESTYLE HEALTH ASSESSMENT

HEALTH RISK ASSESSMENT
Achieve Solutions has online health risk assessments that cover key health issues including heart health; nutrition; weight management; fitness; cancer; stress; and safety.

ON-LINE HEALTH AND WELLNESS PROGRAMS
Living Easy: The Living Easy resiliency and stress management workshop teaches how to build a strong foundation of resilience so one can bounce back from situations that they cannot control, and have courage and confidence in the ones they can. The workshop is in an audio/visual seminar format utilizing Flash animation, quizzes, and a printable online manual which reinforces the critical concepts of the workshop. Each class is 30 to 60 minutes in length.

Living Lean: This no nonsense workshop is designed to put people in control of unhealthy or compulsive eating habits. Members are taught how to change their relationship with food and eating to lose weight, keep it off naturally, and experience lasting lifestyle change. Living Lean focuses on breaking free from an emotional dependency, as opposed to focusing on dieting, pills, packaged food, or feelings of deprivation. The workshop consists of four core sessions, eight support and nutritional sessions, an orientation and an introduction. Also available to Members is access to an online manual, course review for easy reference and support when needed, recipes and food guides, an exercise planner, journaling, personalized emails and reminders and other support tools.

Living Fit: Members learn how to make exercise a regular part of their life and for it to be an activity that they eagerly anticipate.

PWS 5.4.1.3 SESSION TOPICS

Our ~~lifestyle~~ coaches can assist Military OneSource Clients with an array of health and wellness issues, including but not limited to:

- weight loss
- fitness and exercise
- health
- time management
- organizational skills
- goal setting
- ~~life coaching~~
- outreach and engagement
- life health assessment
- ~~non-monetary incentives~~
- improved health and wellness

3. MILITARY ONESOURCE MANDATED PROGRAM SUPPORT CENTERS

6.0 OTHER MILITARY ONESOURCE PROGRAMS AND L17, FACTOR 1, 3 MILITARY ONESOURCE MANDATED PROGRAM SUPPORT CENTERS

PWS 6.1 SPOUSE EDUCATION AND CAREER OPPORTUNITIES (SECO) OBJECTIVES AND SECTION L17, FACTOR 1, 3.A

In anticipation of the transition of the SECO program, we assure that we will continue steady state operations as described below while we manage a seamless 90-day transition to the new vendor. We currently meet all contract requirements for spouse education and career opportunities in partnership with Talent Curve, our Small Woman-Owned Business (SWOB) partner who staff and, along with the Director of Specialty Programs, manage this Military OneSource dedicated call center in support of the spouses of active duty Service Members. Talent Curve has worked with ValueOptions in our commercial division providing career counseling services across the US, using their talented network of more than 100 counselors with experience in education and career counseling. They offer call center support by expert Career/Education Counselors, and specialize in user-friendly, intuitive Web applications that provide useful content, information on resume preparation, and more. Talent Curve brings a wealth of experience—working with spouses, many of them young, often heads of households, frequently at a crossroads in terms of their education and employment and eager to develop themselves and their options—that will well serve the Military Spouse population. They have a proven track record of working with employees who receive tuition assistance, promoting optimal use of time, energy and funding resources, drawing upon their in-depth knowledge base on educational institutions and expertise with use of programs like the College Level Examination Program (CLEP) and the Prior Learning Assessment. In 2006, Talent Curve won *HR Executive* magazine's "Top Product of the Year" award, for *Education in Motion*, their college admissions Web site. Talent Curve has extensive experience working with populations very similar to the military spouses who are the direct clients for this service. The population of military spouses is recognized to be primarily young females, acting heads of households, and parents of young children who lack the education needed for vocational success. They may have limited work experience and have often worked in entry-level jobs. Talent Curve has been serving similar clients for the past four years.

OUR APPROACH
Our team offers a unique blended approach to counseling services including:
- a call center providing telephonic counseling to military spouses
- a user-friendly website with customized information on careers, employment and education for Military Spouses with an emphasis on portable career fields

Our career counseling model contains six steps:

1. Reflect – on the Member's ideal career/life
2. Assess – skills, abilities, interests, aptitude
3. Create – a personalized career and/or education action plan
4. Identify – obstacles and a plan to overcome them
5. Implement – the actions necessary to fulfill your goals
6. Expand – your career options

The live counseling sessions follow the Talent Development Curve. We have a database of resource materials such as credentialing and licensing requirements and costs and education resources. Talent Curve uses a career and education plan (which we can modify to match the MC&FP Education and Training Plan) that the Member will develop and complete while working with the Career Counselor. The plan includes action steps, milestones, and projected completion dates to keep the Member actively engaged.

Follow-up is critical to "preventive care," and Counselors will use phone calls, e-mails, and text messages as "touch points" in counseling and in developing career and education plans. Spouse Career Counselors will discuss resumes in detail and will refer the military spouses to the website for more resume information. A resume creator will be available to guide Members as they write their own resumes and counselors will be available to review them. After working with the Career Counselors, the Members are ready to post resumes on job posting websites. The Counselor will also share tips and techniques on interviewing skills and direct the Member to information within the website. Topics will include responding to difficult and situational questions when they have limited experience.

Online Resources in Support of the Spouse Education and Career Counseling Mission: The Talent Curve website will contain direct hyperlinks to Military OneSource-related information for military spouses and pertinent education/career resources.

A Career Gallery: We focus on specific portable careers, to include education requirements, salary potential, licensing and credentialing requirements and associated costs, career training information, and success stories.

EDUCATION/CAREER COUNSELOR CREDENTIALS

Over the years, Talent Curve's experienced and knowledgeable staff has provided Education and Career Counseling to thousands of individuals. All Counselors for Military OneSource meet the government's minimum requirement of a bachelor's degree with at least two years' experience in education and career counseling. Many of the Counselors far exceed these qualifications.

All of our Career Counselors have:

- knowledge of military, state, federal, and local resources involving education, jobs, and careers
- understanding, sensitivity, and empathy for Service Members and their family members, the ability to work effectively with individuals and families from diverse racial, ethnic, and socio-economic backgrounds, and with adults returning to school after some absence or who may have experienced barriers or obstacles that prevented them from attending or achieving success in school
- experience and skill in delivering feedback on assessments in values, aptitudes, and interests
- knowledge of current job market conditions and trends, both general and local

PWS 6.1.1 MINIMUM REQUIREMENTS OF SPOUSE EDUCATION AND CAREER OPPORTUNITIES (SECO)

Assessment of skills, interests and values is the foundation of our approach to education and career counseling. We will assist spouses with all aspects of a job search, such as resume development and

employment placement. We offer data banks of educational institutions and resources that will include and showcase the costs and programs available and the requirements. To help Members develop their educational and training goals, the Career Counselor will help determine the education needed and then assist in the creation of a customized education and training plan. Counselors will identify milestones that will mark occasions for follow-up and assessment of progress. We confirm that we will provide, at a minimum, the following services as outlined in **PWS 6.1.1**:

- assistance with evaluating educational and training goals
- one-on-one specialty consultation via the telephone
- plan for appropriate aptitude testing in accordance with needs and desires
- assist in planning academic life and career goals
- provide information regarding specializations and levels of training required by educational and career choices
- provide information regarding career credentialing and licensing requirements across state boundaries
- identify appropriate educational resources and costs to include campus and on-line resources
- identify projected salary/compensation by full range of careers
- follow up with spouses entering education/training programs funded by DoD
- link to US Department of Labor, State resources and other sides as directed by DoD
- develop data banks of educational institutions, financial costs, career requirements, salary projections, credential/license requirements and other aspects of education goals
- assist with skills needed to obtain a job (including resume writing and interviewing skills)
- recommend sources of funding for education programs to include degrees, courses, licenses, and certifications
- provide assistance in account creation, review/approve education and training plans, financial assistance documents and school invoices for military spouses of E1-E5, W1-W2 and O1-O2, as they are eligible for financial assistance funded by DoD through Military Spouse Career Advancement Accounts

Career Counselors will recommend and support the following steps for a successful job search:

- match skills, interests and values with a career path, particularly portable careers
- utilize the online job search websites and learn the power of networking
- write several resumes, each with a specific focus, and build a dynamic cover letter
- follow-up every job lead and be proactive, as not all jobs are publicized

Assistance with Resume Preparation. Counselors will communicate with Members, via phone and Web, about resumes in general as well as theirs specifically. A "Resume Creator" tool will be available on the Web-site. Counselors will review individual resumes as they are being developed, and offer advice and support along the way. After working with the Counselor and the "Resume Creator" tool, the Member will be ready to forward a resume on with confidence that it looks professional, and is appropriately tailored to the type of employment being sought. Counselors will assist with interviewing skills directly, and refer Members to the website for information on a wealth of practical interviewing techniques.

Assistance with Job Placement. Counselors will:

- educate Members on the use of the Internet to locate jobs
- show them how to find and utilize local resources
- refer spouses to "military friendly" employers
- direct them toward an internship if they have no work experience
- encourage educational institutions to place Military Spouses
- direct them to success stories posted on the website, to learn how other spouses found jobs
- teach networking-for-employment techniques

PWS 6.1.1.1 SECO PROGRAM MANAGER

We confirm that the SECO Program Manager will possess a Master's Degree in Education/Guidance Counseling and a minimum of five years' experience as a professional Education Counselor.

In addition, Talent Curve's Manager of Career Counseling, Beth Jorgensen, has a Master of Science in Counselor Education, over 20 years of experience in Career Counseling and is the spouse of an Air Force Officer for the past 25 years. Call Center Manager, Gloria Bazemore, has a Master's degree in Career Counseling and over 15 years of call center experience. Our Project Manager, Carletta Waddler, was a military spouse for 15 years and has the credentials and experience in managing a call center project.

PWS 6.1.1.2 SPOUSE CAREER COUNSELORS EDUCATION AND EXPERIENCE REQUIREMENTS

All Counselors providing spouse career counseling for Military OneSource will meet the government's minimum requirement of a bachelor's degree with at least two years of experience in education and career counseling. We will recruit qualified military spouses, former military/military spouses, or career counselors who are experienced in dealing with the military. In addition, the Spouse Career Counselor will:

- understand, appreciate, and value the special circumstances of the military spouse and incorporate this empathy and awareness in their interactions and counseling
- have extensive background counseling adults who may be returning to school after some absence or may face obstacles to success
- have extensive experience in working with a comparable population; predominantly young women, who often have children, some college education, and are underemployed
- know methods by which college credit can be earned outside of the traditional classroom and be well-acquainted with distance learning

PWS 6.1.1.3 CALL CENTER OPERATIONAL HOURS

The SECO program is operational from 7:00 a.m. to 10:00 p.m., Eastern Time, Monday through Friday and from 10:00 a.m. to 5:00 p.m. Eastern Time on Saturday. Members will have access to the website at all times, of course, and after hours they can leave email, which will get a response on the next business day.

PWS 6.1.1.4 RECORD OF CONTACT WITH SERVICE USERS

Spouse Education and Career Opportunities staff will use the ServiceConnect and CareConnect case management system to maintain a record of contact with service users. Counselors will create and maintain detailed records of their Member sessions and interactions, and records will be accessible to authorized staff, so no Member will have to repeat information or re-explain career or education status during any subsequent contact with Military OneSource.

PWS 6.1.1.5 EDUCATIONAL AND CAREER COUNSELING ON PORTABLE CAREERS

In telephonic counseling, our Career Counselors will support Military Spouses to make smart, informed choices about education, employment and career paths. Because the military lifestyle normally requires many moves over the course of the Service Member's career, Military OneSource Spouse education and career opportunities counseling will place priority focus on careers that are portable. These will include, but not be limited to, the fields of: Health Services; Information Technology; Education Services; Financial Services; Construction Trades; Human Resources; Business Management; Hospitality Management; and Homeland Security.

Career counseling will encompass all dimensions of career exploration; including educational requirements, earnings potential, portability, credentialing requirements, and costs, as well as support in finding employment, such as assistance with resume preparation and actual job-search activity. For example, we recommend that prior to an overseas move Military Spouses seek employment with US-based firms that have a presence in the foreign country in which their family is moving. More of these US directed foreign positions do not require bilingual skills, and these skills will be required if the search begins after arrival at the new duty station.

PWS 6.1.1.6 USE OF THE INTERNET, LICENSING, AND DEVELOPING INTERVIEW SKILLS

The ValueOptions Team will offer Military Spouses robust guidance on and assistance with use of the Internet to find jobs. Our Counselors have access to data banks developed specifically for Military OneSource. We assist with determining professional credentialing and licensing requirements and how to meet them. We provide information on occupations and salaries, through resource links to Web sites such as salary.com, the US Department of Labor, Monster, Career Builder, and Career One Stop/America's Job Bank. We provide expert assistance with career planning and transitions, resume development and interview skills.

PWS 6.1.1.7 SECO SERVICES

Our Counselors are thoroughly familiar with all support functions available to military spouses through the Spouse Education and Career Opportunities (SECO) program. Counselors will share information with spouses about SECO, and work cooperatively with DoD program managers in providing services to spouses. They are trained to assist with completion of the Career Advancement Accounts (CAA) application.

The ValueOptions Team supports student spouses in the development of their career plans by working cooperatively with education and training institutions across the country and around the world. We will diligently seek out and share information about any and all available sources of funding to cover the costs of education and/or credentialing.

The initial focus of SECO services will be on the following portable career fields:

- Health Services
- Information Technology
- Education Services
- Financial Services
- Construction Trades (plumber, electrician, carpenter, and more)
- Human Resources
- Business Management
- Hospitality Management
- Homeland Security

PWS 6.1.1.8 PROTOCOLS AND SCRIPTS DEVELOPED FOR ASSISTING SPOUSES

Protocols and scripts that target the needs of a specific Member will guide the interactions and processes by which the Members and Spouse Counselors solve education and career related issues. Although we are providing detail for education and career-related discussions, many Members will require solutions that include both. The following are examples of key protocols, in which the Counselor will:

- introduce themselves and instill confidence by explaining personal experience
- open discussions about new career options such as portable careers
- explore the issues or concerns that prompted the Member to contact the call center

Protocols Specific to Education Counseling:
- If the Member presents a problem regarding education, the Counselor will:
  - ➢ address educational goals and discusses fit with their career/life goals
  - ➢ discuss selection of a degree, major, or school and earning credit for prior learning
  - ➢ discuss funding the program/degree, including MyCAA
  - ➢ together with the Member, develop an action plan, complete with goals and target dates

Protocols Specific to Career Counseling:
- If the Member's concerns center on career issues, the Counselor will:
  - ➢ encourage the Member to discuss career "dreams" and goals
  - ➢ present the value of assessments and encourages usage by the Member
  - ➢ discuss the job search process, including research, salaries, online and print career sources, personal and "social" networking, resume writing and interviewing skills
  - ➢ facilitate the development of an action plan that includes a timeline with goals

PWS 6.1.1.9 REPORTING REQUIREMENTS

We have worked with Government SECO program managers to develop weekly reporting requirements for the SECO program to facilitate program usage and timeliness of assistance provided.

SOURCE SELECTION INFORMATION–See FAR 2.101 and 3.104

PWS 6.1.1.10 CASE MANAGEMENT TRACKING

Career Counselors enter case notes in the Web-enabled, password-protected, permission-based Customer Relationship Management System (CRM). Member-specific information related to education and career counseling services are able to be viewed by authorized staff on select screens within the CRM application.

PWS 6.2 JOINT FAMILY SUPPORT ASSISTANCE PROGRAM AND SECTION L17, FACTOR 1, 3.B

As a global EAP and Work/Life company with a tradition of serving the military, ValueOptions has a history of getting the right services to the right people at the right time. The Joint Family Support Assistance Program (JFSAP) will provide information and referral services, as well as direct support, to Guard, Reserve, and active duty personnel and their families. It will also collect, analyze, and share unique state, US territory, and regional information and approaches that will be maintained in a special database unique to each state and region. The JFSAP team will continually update and improve the database to identify resources and support groups that address the complex local, regional and cultural resource needs of state JFSAP teams. This resource will allow us to most effectively orient new JFSAP Consultants and other incoming Military OneSource program staff throughout the organization.

Enhanced delivery of service-related information and support will be provided through JFSAP mobile support services to isolated units and military personnel and families far from installations. Consultant monitoring of both continuous and emergent situations within the state will produce real time data analysis, discovery of emerging trends, and crisis information that will be shared with leadership and support delivery of services through the call center. Information exchange between JFSAP and the call center will enable JFSAP staff to be both beneficiaries and producers of vital information on trends and issues affecting Members, thereby also reshaping training content for our JFSAP Military OneSource Consultants. Our JFSAP Military OneSource Consultants serving all states, US territories and reserve headquarters; three Regional Consultant Managers; and the Director of Specialty Programs, all interconnect with Military OneSource service and call centers and all other components of the program through internal communication protocols.

Meeting the Needs of Off-Base Families
In the absence of the immediate support that comes with living on base, ValueOptions creates a virtual community through technological applications available for Military OneSource that will benefit off-base families.

These include:

- referrals to community resources including any local Family Readiness Groups or Family Assistance Centers
- referrals to online community resources to establish connections with other military families
- message boards dedicated to issues of deployment or reintegration
- moderated chat on topics related to parenting, family relationships, and more
- Instant Messaging (IM) and Short Message Service (SMS)/text messaging
- podcasts on a variety of topics from money management to health and wellness

- emergency alert systems to user-created groups
- Webinar and online forums on military family topics
- custom e-newsletters for special interest groups
- personalized e-mail addresses like jsmith@militaryonesource.com
- free and easy global connections using IM and Voice over Internet Protocol (VoIP)
- a personal calendar system to help individuals and families manage their time, invite others to meetings and events, and keep track of RSVPs
- *My Military OneSource (MYMilitary OneSource),* allows registered Members to customize layout and content, use an activity calendar, add Google gadgets, and search the Web)
- regular posting online of DoD materials
- print-on-demand materials, and mailing of materials upon request
- Care Solutions tool, which is a self-service electronic experience of speaking with a ~~child care~~childhood or adult care specialist
- website accessible from mobile devices

PWS 6.2.1 MINIMUM REQUIREMENT OF JOINT FAMILY SUPPORT ASSISTANCE PROGRAM (JFSAP)

ValueOptions will provide JFSAP Military OneSource Consultants (referred in this section as consultants) to all state and territory (Puerto Rico) levels trained to provide additional outreach and coordination to geographically isolated Service Members and their families. In coordination with Military OneSource program staff, the Director of Specialty Programs will support the JFSAP consultants in their respective state JFSAP teams. The Military OneSource JFSAP orientation will include training to ensure familiarity with the other Members and programs comprising state JFSAP teams to include Military Family Life Consultants, American Red Cross, and Operation Military Kids. The State JFSAP Consultants will actively reach out and work with the National Guard and Reserve commands and support organizations including the POCs of the many federal, state, and community agencies and civilian programs in their state to expand capacity. Examples include Family Readiness Groups, Family Assistance Centers, State Transition Assistance Advisors, and Reserve Warrior and Family Assistance Center (WFAC) staff.

Working with and finding collaborative solutions to meet the unique challenges of the Reserves will be a priority. There will be a JFSAP consultant assigned to all reserve headquarters, if and when approved by the service component and the Government. At the time of contract award, approval currently exists for JFSAP Consultants at Army and Air Force Reserve headquarters. The Government must approve any additional JFSAP Consultants for the other Reserve headquarters or any other proposed expansion of the JFSAP consultant program.

The JFSAP is a team of family support professionals, organizations, and assistance systems on the state level working collaboratively to assist Members and their families during all cycles of deployment to:

- expand services for Guard and Reserve
- work with state/public and private organizations on existing needs
- use effective methods to market services to military Members and their families
- increase preferred child care provider capacity when directed by government program managers

The Director of Specialty Programs will have oversight for JFSAP Consultants in the 50 states and US territories assuring that they create a united community to connect military families with supportive resources 24/7. The dispersed JFSAP staff will partner with and augment activities of the Family Centers, Guard and Reserve programs, including Inter-Service Family Assistance Committees (ISFACs), and other programs and services. This outreach will allow them to build coalitions and connect Federal, State and local resources and non-profit organizations to support Active Duty, Guard and Reserve families. The Director and Regional Managers will assign and oversee staff, integrate information resources, and identify emerging issues to reassess training needs. In addition, careful attention will be paid to the process for resourcing states JFSAP Consultants that includes receiving and assessing requests and scheduling and deploying timely resources to state JFSAP teams to support Yellow Ribbon and other Guard and Reserve command events that have been approved for support by the government. Services and programs will be integrated into a comprehensive delivery system that responds to the needs of Service Members and families at all stages of the deployment cycle and provides information and referral and materials assistance.

The Director of Specialty Programs, Regional Managers and Consultants will serve as experts on available family program resources, benefits, family support processes, and the unique events taking place (e.g. four cycles of deployments) in that particular Sate, US territory, and surrounding region. Each JFSAP Military OneSource Consultant operates under the guidance and work schedule direction of the National Guard Joint Force HQ POC/State Family Program Director as part of the state or local territory JFSAP team. In the case of crisis incidents, the local JFSAP Consultants will obtain immediate information from component or site POCs to have the latest approved information for release to callers inquiring about local or national crisis response services.

The JFSAP staff will recommend ongoing enhancements to the Military OneSource program, based on feedback from component POCs, the Joint Force HQ POC, and others. Consultants will also act as liaisons between Military OneSource and the state/territory Joint Force Headquarters. JFSAP Consultants will travel throughout the state to support on-demand events, community capacity expansion and outreach efforts. In doing so they will meet with Service Members and their families to assess needs, establish strong relationships with community resources and offer warm hand-off referrals to various services. The Director and her management team will conduct regular teleconference and video Webinar trainings for our JFSAP staff.

In addition, extensive training will be offered, and Consultants' performance tracked and monitored through activity documentation and event survey feedback to verify their thorough understanding of the Military OneSource program and accomplishment of program objectives.

As needed, we will seek new Consultants from qualified military (especially Guard and Reserve), family members, veterans, and retired military who currently or recently lived in that state. ValueOptions recruitment department, in consultation with State Joint Force Headquarters POCs, the State's Department of Military/Veterans Services, and/or organizations serving Guard and Reservists will be accessed as needed to hire staff.

PWS 6.2.1.1 COORDINATING JFSAP ACTIVITIES

We will use our SharePoint system for oversight and integration of resources. SharePoint will allow best products and practices to be recorded and shared throughout the JFSAP team and call center. The system

will also allow for information to be exported and tailored for the purpose of sharing resources with other providers and programs in each state. For example, the following resources have been approved by the Government and are on the current resource list: (e.g., child care services such as Zero to Three; Military Child Education Coalition; Operation Military Kids [OMK] and the 4-H Clubs; Air Forces' Returning Home Care Program and Quality Family Child Care [QFCC] Project; DoD's Operation Military Child Care [OMCC]: Army Reserve Child and Youth Services [CYS]; and the National Military Family Association's [NMFA] state volunteers working on Operation Purple Summer Camps). In order for a new resource to be approved for use, a JFSAP completes a standard form that describes the resource and submits the form to their Regional Manager. If the Regional Manager finds the submission to be appropriate and complete, they forward it to our Resource Coordinator who then evaluates the submission per program guidelines and, if necessary, forwards the resource information to the Government for approval. Only once the submission meets program guidelines or approval is received from the Government is the resource considered vetted and authorized for use. We will share the data/information contained in the SharePoint site with the Government upon request.

PWS 6.2.1.2 JFSAP SERVICES AND RESOURCES

The JFSAP Military OneSource staff will provide the necessary services and resources, including:

- identification of family needs
- cataloguing existing family programs and support resources, including determination of how well each the these programs and resources meet family needs
- identification of gaps in services or other problems
- determining strategies to fill identified gaps and enhance existing services and resources
- planning and implementing a comprehensive, integrated mobile service delivery system
- providing quality on-demand support for Yellow Ribbon Reintegration Programs (YRRP) and other pre- and post-deployment events

4. PROGRAM OVERSIGHT

PWS 7.0 PROGRAM OVERSIGHT OBJECTIVE AND SECTION L17, FACTOR 1, 4.A

The ValueOptions management team will ensure consistent delivery of high quality services to Military OneSource Members. The Military OneSource Program Management staff is comprised of and guided by individuals with extensive experience in working with the military population and their families as well as with Federal contracts. We will adhere to well defined processes and procedures that reflect our expertise and best practices in EAP and Work/Life services as well as our years of experience in serving military families. We will continue to partner with the Government's Military OneSource Program Office staff to support and deliver the program they have envisioned and built over the last decade.

Organizational Structure. Key personnel and subcontracting partners are identified in **Section 1.1.1**. ValueOptions' program management organization provides clear lines of communication and points of contact to ensure management responsiveness to the government. Our structure ensures that we provide DoD with the best qualified and experienced personnel to serve our military and their families, DoD, and DOI on schedule, and at cost across the Military OneSource program. Our processes are flexible enough to control the schedule, performance, and risk associated with this contract, and they are designed to maintain clear visibility into the program schedule, performance, and risks. In addition to the organizational chart included in the Administrative section of our response, the Military OneSource organizational chart is provided below:

ValueOptions' Program Management Team
Proprietary and Confidential
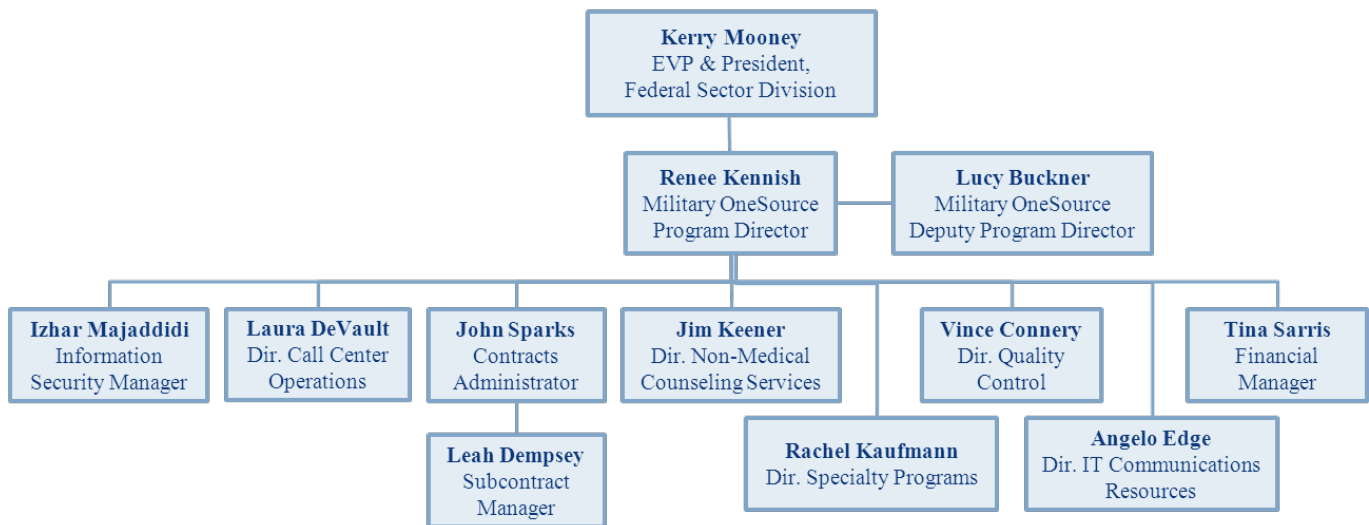
PWS 7.1 MINIMUM REQUIREMENTS FOR PROGRAM MANAGEMENT

ValueOptions has created a dedicated Military OneSource management team of experienced and committed personnel. Renée Kennish, as Program Director, is empowered to speak on behalf of the ValueOptions Team with the DoD and COTR.

The Program Director will have six key accountabilities:

1. Transition/Implementation, and Ongoing Deliverable Management
2. Contract Performance
3. DoD and COTR Representation
4. Internal and Subcontractor Management
5. Quality Management/Integrity
6. Cost Containment

ValueOptions will use Deltek to track time and attendance, contract management, travel, and operating expenses. It produces a broad array of dynamic key metric dashboards, including reporting applications, project reports, labor distribution reports, job cost reports, budget variance reports, and billing reports that enable financial management to make timely decisions that align with business goals. Timesheet information, after manager verification, is entered directly into our accounting system, where records are maintained for seven years (per Internal Revenue Service Guidelines) in support of any audit requirements.

The Program Director will oversee the ongoing deliverable management of the Military OneSource services. This includes:

- services delivered by the ValueOptions Team (internal/subcontractors) Military OneSource program elements and activities as they relate to cost, performance and schedule
- the Quality Management plan and compliance with the Government's Quality Assurance objectives
- timeliness, quality, accuracy and high-quality delivery of all service and reporting requirements
- developing an open relationship of mutual trust with all Military OneSource employees
- effective relationships with Federal government contracting officers and other government representatives and Military OneSource program staff

Another critical component of the Military OneSource program is the Quality Assurance function. The ValueOptions Program Director is responsible for ensuring the Quality Management/Integrity of the Military OneSource Program. She will manage the internal Military OneSource Personnel as well as the Subcontractor team and act as the principle authority and 'single voice' to the Government's COTR, with whom she will work directly. Currently supporting the Program Director will be:

- Deputy Program Director
- Director of Call Center Operations
- Director of Non-Medical Counseling
- Director of Quality Assurance
- Director, Specialty Programs
- Technical Lead—Director, Information Technology
- Information Security Manager
- Subcontractor Manager
- Financial Manager
- Contract Administrator

ValueOptions will provide extensive support from our corporate resources (HR, Accounting/Finance, Payroll, Contracts, Legal, and IT) to augment the Military OneSource-dedicated staff. Our corporate leadership is fully committed to support the Military OneSource mission. The Program Management Team oversees: transition/implementation; contract performance; DoD and COTR communication/ interface; subcontractor management, quality management and cost containment.

The Program Director will meet regularly with the key personnel responsible for Military OneSource management areas. She will convene an annual meeting to discuss strategy, contract compliance, and other relevant and important plans for the program. A key tool that the Program Director will use is the CONNECTS system (as described in **Section 4.4**). This system provides the Program Director with a proactive, efficient, and effective way to respond to the Government's requirements and emerging over the life of the contract. This system serves as an additional means for the monitoring and collection of data in support of the ValueOptions Quality Assurance requirements and the Governments Quality Assurance and Surveillance Plan (QASP).

PWS 7.1.1 MILITARY SERVICES SPECIFIC TRAINING

ValueOptions has developed a comprehensive five week training program specialized for Military OneSource staff, which has been further refined over time. This training includes many modules on military specific training. Both employees and subcontractors are required to learn military culture, terminology, branch specific issues/concerns, and the struggles facing Members and their families. Detailed assessments must be completed demonstrating proficiency with the subject matter prior to staff being placed on the phones and taking live calls. Classroom settings and Webinars will be utilized to meet the learning needs of staff members and subcontractors. In addition, trainings are recorded and posted on ValueOptions secure intranet and made available to new staff and as a refresher to existing staff. Sample training materials unique to the military may include:

Sample Military OneSource Team Military Training	
Full orientation to military culture, lifestyle, terminology, everyday issues and each unique service branch (including families):	

➢ Military Culture and Way of Life
 a. Military Bearing
 b. Rate and Rank insignias
 c. Review of each service branch
  ▪ Military acronyms and terminology
  ▪ Military protocols
 d. Military community resources and family support
 e. Military association resources
 f. Chain of Command and Chain of Concern
 g. Benefits, Entitlements and Compensation
	➢ Homecoming
	 a. Homecoming for couples
	 b. Homecoming for adolescents
	 c. Homecoming for children
	 d. Adjusting to civilian life after combat
	 e. Sleep disorders
	 f. Stress management
	 g. Dealing with combat stress
	 h. Helping children adjust to parent's physical and emotional changes
	 i. Integrating back into the community
	 j. Returning to "civilian job" from Reserves

➢ Challenges Associated with Frequent Relocation a. Changing schools b. Displacement from extended family c. Adjusting to life without friends and family d. Child care e. Elder care f. Job relocation	➢ Grief and Loss a. Grieving the death of a Member or loved one b. Helping children deal with death

Sample Military OneSource Team Military Training
Full orientation to military culture, lifestyle, terminology, everyday issues and each unique service branch (including families):

➢ Deployment/Redeployment Issues
   a. ~~Child care~~Childhood services for deployed Member
   b. Extended family care
   c. Children living with relatives
   d. Family life as a dual military couple
   e. Building resiliency within the family
   f. Children and separation anxiety
   g. Stress of redeployments
   h. Coping with loneliness
	➢ Substance Abuse Issues
	   a. Dealing with the problem as a family
	   b. Education regarding signs of potential substance use
	   c. Support and education regarding Al-Anon and similar services
	   d. Referral to appropriate resources

➢ Separation and Divorce
   a. Divorce/separation and effect on children
   b. Coping with infidelity
   c. Couples counseling
	➢ Retirement
	   a. Preparing for retirement from the military
	   b. Adjusting to civilian life after retirement

PWS 7.1.2 MANAGEMENT PROCESSES AND TOOLS

As demonstrated through our current administration of the Military OneSource program, our Team's experience, management processes, tools, and technical expertise in managing the Military OneSource program are unparalleled in the industry.

Industry Best Practices
ValueOptions leadership has been instrumental in influencing best practices within the employee assistance field. Some of our leadership activities have included, but are not limited to prominent contributions to such things as:

- development of COA accreditation standards for EAP
- serving as peer reviewers for the accreditation process
- participating in industry think tanks such as the EAP Joint Industry Alliance sponsored by SAMHSA
- development of the EAP Purchaser's Guide from the Employee Assistance Society of North America (EASNA)
- participation in the EAP Standards document by the Employee Assistance Professionals Association (EAPA)
- participation in the National Business Group on Health's EAP workgroup developing a best practices document for employers
- committee participation in the Action Alliance for suicide prevention, employer workgroup
- participation as a committee member for the Employee Assistance Certification Commission (EACC) responsible for the CEAP certification
- years of participation in both national and local leadership positions within EAP industry Boards and membership chapters

These activities allow us to continually monitor influence, and implement emerging best practices.

Management Processes
As a result of our more than 30 years in delivering EAP services, ValueOptions has developed

management processes that continually support quality results in all that we do. Our management philosophy, as it relates to EAP, is that we insist on EAP professionals who recognize the importance of their role in engaging and connecting with callers. This includes their ability to conduct a thorough and clinically sound assessment, as well as being able to support the caller towards action that will best result in problem resolution and improved health or personal performance. In order to achieve this lofty goal, we believe our people are the key to our success. Our management teams are intimately involved in listening to our staff's interactions with callers, reviewing system documentation, and providing coaching and supervision on how we can continually improve our efforts. Our management processes include clear policies and procedures, and standards that we impart consistently across all staff. We recognize the ongoing importance of training, and provide our staff access to both internal and external learning opportunities so they remain current in new and best practices.

Tools and Technical Expertise

Our proven and fully interoperable technology platforms of our CONNECTS system support all of our management processes. Specifically, CONNECTS is integrated and used by all Military OneSource staff and providers, allowing for near real-time and continuous management through metric dashboards specific to Counselor/Care Manager readiness, as well as the other components of the system. Our systems are designed for ease in user navigability and also flexibility in the types of data elements that we collect. Our frontline staff has continually participated in think tanks to improve our systems. In addition, we have demonstrated a commitment to advancing our technology based on the needs and interests of users. This has included developing the first member-facing and interactive website for telephonic counseling and a similar platform for management consultation. In addition, ValueOptions was a leader in the industry in offering online chat with a counselor. All of these programs have been designed with the intention of increasing ease in Member access and improving rates of program engagement.

PWS 7.1.3 WARM HAND-OFFS

Today, ValueOptions' Call Centers across the country facilitate warm transfers to providers and resources within the community. The ValueOptions Team will utilize these processes and procedures to ensure Military OneSource compliant warm handoffs to our providers and to military and community resources. Specifically, our warm handoff processes/procedures require the Consultant to remain on the line with the inquiring Member while a connection and handoff is executed. Key to a successful warm handoff is the correct dissection of the purpose of the call. At the end of each warm handoff, the Consultant will log the call into our ServiceConnect application, to track the activity that occurred. To ensure satisfaction after the warm handoff, the Consultant will follow the quality assurance processes outlined in **Section 7.3**. As ServiceConnect is fully inter-operable, upon the required immediate logging of the call into the ServiceConnect system, the Military OneSource staff are able to view the details of the call (caller, issue type, resolution), allowing them to immediately access the history of the Member's calls and reference that during their discussions, providing an 'air' of familiarity.

PWS 7.1.4 PROCESSES/PROCEDURES: WORLDWIDE SUPPORT

Drawing upon our significant history in providing EAP and Work/Life services worldwide, the ValueOptions Team has established policies, procedures, and management processes, backed by state-of-the-art technology and a compassionate staff, to guide our day-to-day service delivery. As identified

in **Sections 4.1 and 4.5**, our telephony, CONNECTS platform and our redundant call centers provide the underpinning for 24/7 service around the world. Our language translation services support more than 170 languages **(see also PWS 4.1.1.11).** Using key metrics, such as quality survey data, telephone data, utilization information, and the service metrics established as part of the quality assurance plan, the Program Director and her team will meet at least weekly to review the available data and to discuss any issues or concerns ensuring that all services are being delivered according to established quality standards. Daily service standards will be available to the Program Director and operations staff via dashboard reports. Areas for additional training will be identified, designed, and implemented, as needed. Issues that require government intervention will be addressed to the COTR and other designated government officials. Problem areas will be identified and immediate remediation plans will be implemented. The Program Director, working with the COTR and others, will identify trends and discuss with the government potential service/program modifications.

PWS 7.1.5 BACK-UP CALL CENTER SUPPORT

The ValueOptions Team operates nationwide call centers and has architected our telecommunications platform to support continuous availability in the event of a disaster. The back up call center support management process includes:

- The call center supervisor will contact the long distance vendor for traffic re-routing to pre-specified destinations.
- The Telecom Lead and Operations Director at the site down will notify their respective counterparts at the designated call forwarding location(s).
- When the outage has cleared, the call center supervisor will re-contact the long distance vendor.
- The long distance vendor will restore toll-free service to the original terminations.

PWS 7.1.6 PEAK USAGE AND SPIKES

Through our call center experience **(see also PWS 4.1)** the ValueOptions Team has existing management processes/procedures to monitor peak usage periods and manage spikes in volume for the Military OneSource program. ValueOptions Call Center leaders will continuously evaluate and confirm staffing needs to have the right number of skilled people and supporting resources in place to handle all service requests. In the event of unexpected spike, the ValueOptions Team will suspend existing staff training, supervision, and other functions, and install an 'all hands' to staff the phones until the call volume returns to typical levels.

PWS 7.1.7 DUTY TO WARN

The ValueOptions Team already has robust processes and procedures in place for Duty to Warn occurrences based on experience administering the Military OneSource contract since October 31, 2011. These protocols have been reviewed with Program staff and refined over time. These Duty to Warn processes includes detailed procedures for evaluating the risk level of the caller, contacting emergency personnel, and steps to take if the call is terminated before emergency personnel arrive. Information regarding the capture and reporting of 'Duty to Warn' scenarios is found in **Section 4.5.1.4.**

PWS 7.1.8 STAFFING REQUIREMENTS

We have a mature Human Resources (HR) Department that supports master's level professional recruitment, hiring, and training that is critical to ensuring we select the right professionals for each of our contracts. This team was instrumental in helping to recruit, hire, and train our talented Military OneSource team that is in place today. Should vacancies open through staff attrition, our dedicated management team will initiate a recruitment and hiring campaign for Military OneSource master's level professionals, with the goal of maximizing representation from qualified military family members (with a focus on spouses), veterans and retired military, and severely injured members medically cleared for employment, from all Service branches, as well as the National Guard and US Reserve Personnel.

Our Human Resources Department will coordinate the initial screening process for all Military OneSource master's level professional job applicants alongside our capable staffing vendor partners. As a part of the Military OneSource hiring process, for all master's level professional positions, a specific education will be verified. Our Team includes agencies such as Auroros, Inc. and other employment placement services, such as 4StarJobs.com, VetJobs.com, HireVetsFirst and Military Spouse Resource Center (MILSpouse.org), that specialize in working with master's level professional service members who have retired, are a military spouse, or separated from the military and are seeking employment. We recognize the importance of having both National Guard and Reserve component representation and military spouses on our master's level professional staff.

Training. Our Teams' master's level professional employees' orientation includes extensive training to ensure each employee understands their role in providing consistent, high quality service to all customers. Our new hire orientation and training includes a comprehensive overview of ValueOptions and how our mission, vision and values translate into desired behaviors and organizational effectiveness. We also provide new hires with ValueOptions' mentors to assist them during their introductory period. We continually evaluate the effectiveness of our orientation programs to ensure they are meeting new hire needs and effectively introduce master's level professional employees to the organization.

Managing. Our Military OneSource Clinical Management Team is prepared and equipped to provide effective management to all master's level staff serving the Military OneSource program. This management process includes data driven performance (e.g. Inter-Rater Reliability) as well as Member feedback. Our HR function has a mature remediation process to ensure staff support (e.g. re-training) if necessary.

PWS 7.1.9 SECTION 508

In response to **PWS's 4.2.1.3 and 4.3.1** we describe our management processes to ensure compliance with Section 508 of the Workforce Investment Act of 1998 and all applicable DoD security requirements.

PWS 7.1.10 REGULAR UPDATING ON MILITARY AND COMMUNITY INFORMATION

Currently, the ValueOptions Team has an existing content management process (e.g. review, update, and refresh) for our websites. This process will be used for the content information updates for the Military

OneSource program. As is true today, our Military OneSource website content will constantly be reviewed and updated to reflect the latest military and community information and current social issues. It will be updated to reflect specific DoD requirements for freshness of specific content and expiration dates for content. Information on the website will be updated regularly, providing Service Members and families with current and correct data in disasters or emergency situations.

PWS 7.3 QUALITY ASSURANCE OBJECTIVE AND SECTION L17, 4.B

The ValueOptions Team has developed and maintains a Quality Assurance Program (QAP) for our Military OneSource program. The QA standards built into the plan have been integrated into the policies and procedures that guide the activities of our staff. The standards apply to the CONNECTS applications and Web-enabled applications used by our program personnel, and the Web-enabled application/tools directly used by our Military OneSource customers.

Examples of these standards include the following:

- Service Quality – accessibility, timeliness and deliverability
- Provider Quality – credentials, experience, training, qualifications
- Clinical Quality – appropriateness, effectiveness
- Program Quality – performance, characteristics, compliance with external regulatory standards
- Training Quality – training experience, adequacy of knowledge base
- Customer Perceived Quality – reputation as derived from satisfaction surveys

PWS 7.3.1 MINIMUM REQUIREMENTS FOR QUALITY ASSURANCE.

The ValueOptions Team established a Quality Assurance Plan (QAP) to fit the diverse needs of the Military OneSource Members and its operations. The Military OneSource QAP provides the template for the quality vision of the program. It represents strategies and major activities required to ensure consistency and excellence in the delivery of services to all of our military customers. Our Military OneSource QAP demonstrates a commitment to superior quality and service that is member-focused, appropriate, and culturally competent. This quality service is achieved through an organization-wide, systematic, and coordinated continuous quality management process that includes:

- proactively meeting the unique and evolving needs of our military population
- identifying and monitoring best practices
- identifying and resolving problems
- pursuing opportunities to improve care and service
- promoting effective, appropriate, and efficient care
- offering guidance through various staff training and development initiatives

The following tenants are a cultural expectation of our staff.

- a belief that optimal quality services result from a close partnership between the customer, the provider, and the Member
- quality problems that result in inefficiencies or substandard service frequently stem from faulty processes and systems, rather than individual performance

- accessible, reliable, and current data is vital to organizational decision making
- quality problems can be resolved, and service continually improved, through systematic monitoring, evaluation, feedback, and training
- poor quality is costly
- quality improvement should be a part of each employee's day-to-day work
- education, training, and retraining are critical to quality, and facilitate improvement in job performance

The ValueOptions Team uses a Continuous Quality Improvement (CQI) approach that encompasses monitoring and evaluation activities for the appropriateness and timeliness of services and their outcomes. We identify opportunities to improve quality and establish initiatives to accomplish agreed upon improvements. Our CQI methods use ongoing processes that span all areas of our operations in order to unite every staff member, department and service-provider in a continuous effort of quality planning, action, and evaluation. The quality team will ensure that our QAP is aligned with the requirements outlined in the Quality Assurance Surveillance Plan (QASP) for the Military OneSource program. This team will identify, track, and trend key indicators as outlined in the QASP as well as:

- maintaining a comprehensive quality management plan
- leading the development of all reports as required by the QASP
- analyzing processes and procedures to ensure a successful program foundation
- analyzing reports and developing opportunities for improvement, as appropriate
- monitoring the effectiveness of quality improvement initiatives
- validating delegated subcontractor operations as Military OneSource compliant and providing oversight of ongoing activities
- submitting monthly and ad hoc reports to the government

To further support our quality initiatives, we have created a Military OneSource QA Committee that meets regularly to monitor the quality of services provided to Military OneSource Members. Membership of the Committee is comprised of managerial, subcontractor, MC&FP, and representation from key functional areas, with additional participants, as needed.

Problem analysis will be conducted to develop corrective actions, which will be implemented as appropriate. In the following tables (see Section 7.3.1.2 below), we describe how ValueOptions will monitor the key metrics identified in RFP Section J, Attachment 7, QASP. In general, each individual metric will be monitored through reports generated on specific schedules as appropriate for each metric (e.g. hourly, per shift, daily, weekly, and monthly). Monitoring of these reports will identify base metrics that are beyond quality control limits. For example, with the first metric, speed of answer, the reports will identify calls that were answered outside the control limits of 20 seconds. Identification of these instances will assist the manager of the functional area to make real time operational adjustments (for example, adding more staff to a call line). Trend analyses and aggregated data will be subjected to the overall metrics standard, and when this standard is breached, then a process analysis, root-cause analysis, or similar analytic will be initiated to find the cause of the problem and develop a correction action plan. Thus, for example, monthly data of speed of answer will be evaluated against the performance standard of 90 percent of the calls answered within 20 seconds. If actual performance is not achieved, a process analysis will ensue and a corrective action for improving the process and its outcome will be undertaken.

PWS 7.3.1.1 NON-MEDICAL COUNSELING PROGRAMS WILL BE CONSISTENT WITH COUNCIL ON ACCREDITATION STANDARDS (COA)

While ValueOptions does not currently hold COA accreditation, we are familiar with the COA standards and adhere to those referencing non-medical counseling services. Our Health & Performance Solutions Quality Committee (HPSQC) , with Military OneSource representation, is continually reviewing updates to the COA standards and developing internal measures related to them. Based on ongoing feedback from the industry, COA standards are continually under review and modification. If requested, ValueOptions will provide the Government information demonstrating that our staff and network providers are offering appropriate non-medical counseling support to Service Members and their families.

ValueOptions participates in advisory board discussions with the Council on Accreditation and recognizes, as does COA, that purchasers of EAP services vary in some of their definitions of services covered under the Employee Assistance Program (EAP). ValueOptions will monitor the delivery of services to ensure they remain within scope of those required under the Military OneSource program. This oversight begins with training the consultants to ensure that their competency-based training reflects a solid knowledge of the scope and limitations of services available through Military OneSource. In addition, our internal quality review processes allow us to audit referrals through call monitoring and case record documentation to again ensure consistency in program delivery. Any diversions from the program scope by a Military OneSource Consultant or other staff member will become part of the supervision and corrective action process. For providers seeing Military OneSource Members and their families, they are required to complete a case activity form in order to receive reimbursement. This form also allows for identification of individuals requiring assistance beyond the non-medical counseling available through Military OneSource and result in consultation with a Military OneSource Consultant and a referral to a higher level of care. Results of the above activities will be documented in the Military OneSource Quality Work Plan.

PWS 7.3.1.2 MEASURES NECESSARY FOR MONITORING PERFORMANCE

In the chart below, we provide our Quality Assurance Program for Military OneSource EAP operations.

1-800/WEBSITE

QASP Metric	
Call Center Metrics	
1.1 Provide responsive service to callers **Metric --**Speed of Answer Percent of calls Answered Live in 20 seconds of the first ring	**Standard** –90 percent
Methods to Monitor, Collect Data, and Report the Metric: The Military OneSource call centers will have real time monitoring capability of telephone metrics. Data is collected using our Avaya CMS tool. Tool parameters will be set to screen capture data in real time for call center supervisor viewing. Data will be entered, via automated upload, to our KnowledgeConnect system, part of our Knowledge Management system, in Government approved formats. The Call Center Supervisor will be able to monitor the percentage of calls answered live throughout the day allowing for instantaneous staff adjustments in order to meet the current call volume. Reports can be run on a daily, weekly, and monthly basis or as required to ensure continuous processing of Military OneSource improvements in this area.	
1.2 Provide responsive service to callers **Metric --** Abandon Rate	**Standard** – < .5
Methods to Monitor, Collect Data, and Report the Metric -- The Military OneSource call centers will have real time monitoring capability of telephone metrics. The Call Center Supervisor will be able to monitor the percentage of calls abandoned in real time, allowing for staffing adjustments as needed. Data is collected using our Avaya CMS tool. Tool parameters will be set to screen capture data in real time for call center supervisor viewing. Data will be entered, via automated upload, to our KnowledgeConnect system, in Government approved formats. Reports can be run on a daily, weekly, and monthly basis or as required to ensure continuous processing of Military OneSource improvements in this area. Additionally, reports run on a daily, weekly, and monthly basis will be monitored to identify opportunities for improvement.	
1.3 Provide responsive service to callers **Metric --** Messages Taken as percent of Calls	**Standard** – <.0.5 percent
Methods to Monitor, Collect Data, and Report the Metric – Calls from Military OneSource Members to the toll-free 1-800 will be answered directly by a Consultant who will assist the caller and connect the caller with resources to respond to the stated need. In the rare event that call volume necessitates taking messages and performing callbacks, these calls will be coded in order to track the percentage of calls requiring a callback to initiate services. Immediate interventions will be put into place should callbacks occur and staffing will be adjusted to eliminate this practice. The call record tracking system and work queues allow staff and their supervisors the ability to track the number of calls by specific reason code, identify call backs and monitor the percentage of calls that required a message to be taken. This information will be monitored in real time as well as on a daily, weekly and monthly basis to help determine workflow and availability of staff. Further data analysis and reporting will be generated automatically, based on preapproved templates, as required by both the QASP and as directed by the Program Director for easy retrieval and viewing.	
1.4 Provide responsive service to callers **Metric** – Hold Time during triage < 5 minutes	**Standard** – 95%
Methods to Monitor, Collect Data, and Report the Metric -- The Military OneSource call centers will have real time monitoring capability of telephone metrics. The Call Center Supervisor will be able to monitor the hold time in real time, allowing for staffing adjustments as needed. Data is collected using our Avaya CMS tool. Tool parameters will be set to screen capture data in real time for call center supervisor viewing. Data will be entered, via automated upload, to our KnowledgeConnect system, in Government approved formats. Reports can be run on a daily, weekly, and monthly basis or as required to ensure continuous processing of Military OneSource improvements in this area. Additionally, reports run on a daily, weekly, and monthly basis will be monitored to identify opportunities for improvement.	
1.5 Provide responsive service to callers **Metric** – Callbacks completed within 48 hours	**Standard** – 95 percent
Requests from Military OneSource Members requiring research to obtain additional information, occasions in which call backs are required due to messages being taken, or when a caller leaves a message for an individual staff member they will receive a callback	

QASP Metric	
from the Consultant or specified staff member within 48 hours. These callbacks will be tracked in Service Connect and reports will be run daily, weekly and monthly to track timeliness of callbacks. Analysis will be performed to determine if staff members are not meeting timeliness standards to determine whether the gap is due to resource limitations or to individual performance issues. Based on this analysis, interventions will be implemented to assure that callback standards are met.	
1.6 Provide responsive service to callers **Metric** – Provide translation service to callers	**Standard** – 100%
Methods to Monitor, Collect Data, and Report the Metric -- Calls will be identified as requiring language translation services upon the Member's request or when the Military OneSource Consultant determines the Member is experiencing difficulty communicating and offers the caller translation services in their preferred language. The Military OneSource Consultants will then conference in a Translation Specialist to translate the rest of the conversation. All calls will be documented in the ServiceConnect case management system. Documentation will be made in the Member's record to indicate a preference to use the translation service for all future contacts. Further data analysis and reporting will be generated automatically, based on preapproved templates, as required by both the QASP and as directed by the Program Director for easy retrieval/viewing.	

Case Metrics	
Metric -- Follow-up Attempts (as agreed to by caller and as clinically appropriate)	**Standard** – 100 percent
Methods to Monitor, Collect Data, and Report the Metric – ValueOptions has specific standards for clinical follow-up based on issue severity and other factors. These follow up attempts to contact a Military OneSource caller will be based upon their permission. The follow-up screen in CareConnect will be used to document all follow-up communications, including the Member's permission for the follow-up attempt and the requested time for the call. The time for the follow-up attempt will be recorded in the tracking system and the appropriate work queue and the outcome of the follow up attempts will be documented. Daily reports created by KnowledgeConnect and IntelligenceConnect will allow supervisors to confirm these follow-up contacts were attempted. Further data analysis and reporting will be generated automatically, based on preapproved templates, as required by both the QASP and as directed by the Program Director for easy retrieval and viewing.	
Metric -- Service Breakdowns** as a Percentage of Cases ***Any failure in service as recorded by the Service Member or family member*	**Standard** – <0.5 percent of total cases
Methods to Monitor, Collect Data, and Report the Metric -- Should we receive complaints from Members regarding their perceived failure to obtain appropriate services, this will be documented in the ServiceConnect system. Reports identifying these complaints will be generated by KnowledgeConnect and corrective actions implemented as needed. In addition, we will respond to the Member regarding their feedback within 48 hours of receipt of the complaint. Further data analysis and reporting will be generated automatically, based on preapproved templates, as required by both the QASP and as directed by the Program Director for easy retrieval and viewing.	
Metric -- Document Translation Completed within three business days	**Standard** – 95 percent
Methods to Monitor, Collect Data, and Report the Metric -- Members requiring document translation assistance will be encouraged to submit the information electronically or via fax to the Military OneSource Consultant. The request will be entered into the ServiceConnect system. A member of the ValueOptions Team will perform the translation functions and report their completion, to include the date and time the document was mailed or faxed to the requesting Member. Reports demonstrating the turnaround time of document translations will be reviewed by Call Center Supervisors on a weekly basis to monitor the timeliness of completion of requests. Corrective action will be implemented should there ever be identified patterns of performance that exceed three business days. Further data analysis and reporting will be generated automatically, based on preapproved templates, as required by both the QASP and as directed by the Program Director for easy retrieval and viewing.	

User Satisfaction Metrics	
Metric -- Percentage of Participants Surveyed	**Standard** – 100 percent of those appropriate for survey
Methods to Monitor, Collect Data, and Report the Metric - Those appropriate for satisfaction surveying will be defined as those Members who receive routine telephonic, Web or face-to-face EAP services, Work/Life services, materials,	

SOURCE SELECTION INFORMATION–See FAR 2.101 and 3.104
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QASP Metric
translation services, and Members who have contacted the call center or website for information with whom we are able to establish follow-up contact. These Members will be asked to voluntarily respond to questions regarding their satisfaction with the Military OneSource services provided. ValueOptions will deploy two optional methods for collecting customer satisfaction data. The primary method will be through the development of a Web survey which Members can complete online and submit directly into the KnowledgeConnect system electronically. The second method of collection is through the use of the ValueOptions Team's IVR system, which allows users to respond to customer satisfaction questions using the Avaya telephone system. The responses will be captured by the CMS data base and transferred to KnowledgeConnect for further analysis and reporting.

Metric -- Percent of Overall Satisfaction	**Standard** – 95 percent
Methods to Monitor, Collect Data, and Report the Metric -- Overall satisfaction will be an aggregate of the following three measures: Immediate IVR feedback, immediate website survey response, via CMS and KnowledgeConnect, and feedback on educational materials once received. Further data analysis and reporting will be generated automatically, based on preapproved templates, as required by both the QASP and as directed by the Program Director for easy retrieval and viewing.	

Metric -- Satisfaction with the Educational Materials *Percent satisfied with Educational Materials (received in a timely manner, readability, utility and validity*	**Standard** – 95 percent
Methods to Monitor, Collect Data, and Report the Metric -- Members who request educational materials and who agree to be contacted for follow-up will be asked to assess their satisfaction with the educational materials they received. Level of satisfaction will be assessed for the following: timely receipt, readability, and utility. The results from these surveys will be stored in the KnowledgeConnect System, aggregated and analyzed on a weekly basis. Further data analysis and reporting will be generated automatically, based on preapproved templates, as required by both the QASP and as directed by the Program Director for easy retrieval and viewing.	

Metric – Satisfaction with translation/interpretation services	**Standard** – 95 percent
Members who request translation/interpretation services and who agree to be contacted for follow-up will be asked to assess their satisfaction with the translated documents they received. Level of satisfaction will be assessed by asking questions for the following: timely receipt, readability, and utility. The results from these surveys will be stored in the KnowledgeConnect System, aggregated and analyzed on a weekly basis. Further data analysis and reporting will be generated automatically, based on preapproved templates, as required by both the QASP and as directed by the Program Director for easy retrieval and viewing.	

Metric – Satisfaction with nonmedical counseling	**Standard** – 92 percent
This score will be derived by aggregating the sum of scores for each of the specific types of nonmedical counseling provided: financial nonmedical counseling, nonmedical telephonic health and wellness coaching, face to face nonmedical counseling, telephonic nonmedical counseling and web-based nonmedical counseling. The results will be stored in the KnowledgeConnect System, aggregated and analyzed on a weekly basis. Further data analysis and reporting will be generated automatically, based on preapproved templates, as required by both the QASP and as directed by the Program Director for easy retrieval and viewing.	

Metric -- Satisfaction with nonmedical financial counseling	**Standard** – 92 percent
A statistically significant sample of members who agree to be contacted for follow up will be asked to assess their satisfaction with the nonmedical financial counseling they received (the sample size will be determined based on total members using financial counseling services and will target 90 percent annual confidence rate +/- 5 percent). Items to be surveyed include ease of access, would the participant use the service again, would the participant recommend the service to other members, and overall satisfaction with service. The results from these surveys will be stored in the KnowledgeConnect System, aggregated and analyzed on a weekly basis. Further data analysis and reporting will be generated automatically, based on preapproved templates, as required by both the QASP and as directed by the Program Director for easy retrieval and viewing.	

Metric -- Satisfaction with nonmedical telephonic health and wellness coaching	**Standard** – 92 percent
At the conclusion of nonmedical telephonic health and wellness coaching members will be asked to participate in an online or IVR survey to assess their satisfaction with the nonmedical telephonic health and wellness coaching they received. Items to be surveyed include helpfulness of coaching in addressing their issue, would the participant use the service again, would the participant recommend the service to other members, and overall satisfaction with service. The results from	

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QASP Metric
these surveys will be stored in the KnowledgeConnect System, aggregated and analyzed on a weekly basis. Further data analysis and reporting will be generated automatically, based on preapproved templates, as required by both the QASP and as directed by the Program Director for easy retrieval and viewing.

Metric – User Satisfaction with face to face experience in relation to nonmedical counseling	**Standard – 92 percent**
A sample of members who agree to be contacted for follow up will be asked to assess their satisfaction with the nonmedical counseling they received (sample size will be based on total members who accessed face to face nonmedical counseling and will target 90 percent annual confidence rate +/- 5 percent). Items to be surveyed include comfort with counselor, ease of access, would the participant use the service again, would the participant recommend the service to other members, whether counseling provided helped with their issue, and overall satisfaction with service. Sample questions include the following: 1) For your first appointment, were you able to get an appointment as soon as you wanted? 2) Overall, how would you rate the quality of the service you have received from your counselor (Excellent, very good, good, fair, or poor). The results from these surveys will be stored in the KnowledgeConnect System, aggregated and analyzed on a weekly basis. Further data analysis and reporting will be generated automatically, based on preapproved templates, as required by both the QASP and as directed by the Program Director for easy retrieval and viewing.	

Metric -- Satisfaction with telephonic experience in relation to nonmedical counseling	**Standard – 92 percent**
All members who participate in telephonic nonmedical counseling will be invited to participate in a web-based or IVR satisfaction survey following sessions 6 and 12 or at completion of counseling. Items to be surveyed include but are not limited to ease of access, would the participant use the service again, would the participant recommend the service to other members, and overall satisfaction with service. The results of these surveys will be stored in the KnowledgeConnect System, aggregated and analyzed on a weekly basis. Further data analysis and reporting will be generated automatically, based on preapproved templates, as required by both the QASP and as directed by the Program Director for easy retrieval and viewing.	

Metric – User satisfaction with web-based experience in relation to nonmedical counseling	**Standard – 92 percent**
At the conclusion of web-based counseling all members will be invited to complete a web form to measure satisfaction with the web-based experience for nonmedical counseling. Items to be surveyed include but are not limited to ease of access, would the participant use the service again, would the participant recommend the service to other members, and overall satisfaction with service. The results from these surveys will be stored in the KnowledgeConnect System, aggregated and analyzed on a weekly basis. Further data analysis and reporting will be generated automatically, based on preapproved templates, as required by both the QASP and as directed by the Program Director for easy retrieval and viewing.	

Educational and Informational Materials	
Metric -- Timeliness of distribution Educational and Information Materials Produced in a timely manner for distribution as agreed by contractor and customer	**Standard** – 100 percent
Methods to Monitor, Collect Data, and Report the Metric – Our CareConnect case management system allows us to document the date that educational and informational materials are both requested and distributed. Reports will be generated and reviewed on a weekly basis to monitor compliance.	
Metric -- Educational Materials and Referrals Shipped within 48 hours	**Standard** – 98 percent
Methods to Monitor, Collect Data, and Report the Metric -- From the CareConnect case management system a weekly report will indicate the timeliness of distribution of educational materials. Should there be any cases which exceed 48 hours to complete, they will be investigated through KnowledgeConnect to identify the root cause. As necessary, interventions will be made to meet compliance with this metric. Further data analysis and reporting will be generated automatically, based on preapproved templates, as required by both the QASP and as directed by the Program Director for easy retrieval and viewing.	

Employee Quality/ Training	
Metric -- Employee Training Contractor provides employees Service-specific orientation w/in 30 days of hire	**Standard** – 100 percent
Methods to Monitor, Collect Data, and Report the Metric -- All staff will receive a comprehensive orientation that	

SOURCE SELECTION INFORMATION–See FAR 2.101 and 3.104
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QASP Metric
includes, but is not limited to:

- military and service-specific structure, customs, culture, traditions, environment, benefits, and programs
- cultural competency
- contract performance metrics
- job specific training
- state/federal, regulatory requirements
- contractual requirements

The new employee orientation will be conducted within the first 30 days of employment. A comprehensive examination will be provided at the conclusion of each training module to assess staff assimilation of the material presented as a measure of comprehension. Staff will be expected to score 90 percent or above on each examination. Additional training will be provided for staff members not meeting the score requirements. Strict training records will be maintained in HRConnect, to include amount and type of training conducted, quantified by service to ensure 100 percent compliance with this requirement. In addition, satisfactory completion of this training will be a part of their annual performance appraisal. Further data analysis and reporting will be generated automatically through HRConnect, based on preapproved templates, as required by both the QASP and as directed by the Program Director for easy retrieval and viewing.

Metric -- Amount, type and quality of employee refresher training provided Contractor provides employees refresher training of each Service annually	**Standard** – 100 percent

Methods to Monitor, Collect Data, and Report the Metric -- All Military OneSource staff will receive an annual training review on job specifics, with additional essential topics, including Service-specific elements, state, Federal, and regulatory requirements. A comprehensive examination will be provided at the conclusion of each refresher training module to assess staff assimilation of the material presented as a measure of comprehension. Staff will be expected to score 90 percent or above on each examination. Additional training will be provided for staff members not meeting the score requirements. Strict training records will be maintained in HRConnect, to include amount and type of training conducted, quantified by service. In addition, satisfactory completion of this training will be a part of their annual performance appraisal. Further data analysis and reporting will be generated automatically, based on pre-approved templates, as required by both the QASP and as directed by the Program Director for easy retrieval and viewing.

Case Management System Metrics

Metric -- Percent Case Management System up time (excluding scheduled maintenance)	**Standard** – 99 percent

Methods to Monitor, Collect Data, and Report the Metric -- The IT Director will monitor the case management system uptime and performance on a real time basis using the tools identified in **4.2.1.4**. If we experience a drop in system availability in uptime below the 99 percent benchmark, the IT Director will take immediate corrective measures to determine the cause in the system being unavailable for use. System uptime statistics will be collected in KnowledgeConnect and reports will be generated on a daily, weekly and monthly basis.

Metric -- Scheduled maintenance outages for Case Management System not to exceed 1 hour/month	**Standard** – 90 percent

Methods to Monitor, Collect Data, and Report the Metric -- The IT Director and Webmaster will be responsible for planning scheduled maintenance and proactively informing the government of these scheduled times. In the event that the IT Director or Webmaster is unable to complete maintenance in a one-hour window, maintenance activity will be postponed until a more effective approach can be developed to allow The ValueOptions Team to meet the metric. Data analysis and reporting will be generated automatically, based on preapproved templates, as required by both the QASP and as directed by the Program Director for easy retrieval and viewing.

Reporting Metrics

Metric -- Timeliness and quality of reports Percent of monthly reports delivered by the 10th of the month	**Standard** – 95 percent

Methods to Monitor, Collect Data, and Report the Metric – ValueOptions will deliver accurate, timely and user-friendly monthly and annual reports to the designated POCs following the guidelines established in **Attachment J.** Our adherence with this standard will be monitored monthly to insure compliance and identify anomalies. Further data analysis and reporting will be generated automatically, based on preapproved templates, as required by both the QASP and as directed by the Program Director for easy retrieval and viewing.

Metric -- Annual report delivered 60 days after the end of POP	**Standard** – 100 percent

SOURCE SELECTION INFORMATION–See FAR 2.101 and 3.104
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QASP Metric

Methods to Monitor, Collect Data, and Report the Metric – The ValueOptions Team will deliver accurate, timely and user-friendly annual reports using KnowledgeConnect to the designated POCs following the guidelines established. Further data analysis and reporting will be generated automatically, based on preapproved templates, as required by both the QASP and as directed by the Program Director for easy retrieval and viewing.

Provider Network Metrics	
Metric --Provider available within 30 minutes of caller or 15 miles of customer's location	**Standard** – 92 percent
Methods to Monitor, Collect Data, and Report the Metric – Based upon the zip code of the caller, Military OneSource Counselors will use the GeoAccess feature of ServiceConnect to research and provide the names of appropriate referrals within specified distances and times. Should there be an incident in which a provider is not located within these guidelines, a corrective action plan will be developed and shared with the government. A monthly report will be reviewed to ensure provider adequacy and network sufficiency is achieved and maintained. Further data analysis and reporting will be generated automatically, based on preapproved templates, as required by both the QASP and as directed by the Program Director for easy retrieval and viewing.	
Metric --Network training Contractor provides provider network service-specific orientation within 30 days of hire	**Standard** – 100 percent
Methods to Monitor, Collect Data, and Report the Metric -- All network providers serving Military One Source Members will participate in service-specific orientation within 30 days of contracting or the start of the Military OneSource contract, whichever comes first. This training will be offered electronically and via teleconference in order to make its availability convenient to the schedules of the provider network members. Certificate of completion of training will be generated and will be recorded in the individual provider's file. Administrative training will be tracked through the GoTo Webinar process and this information will also be stored in the provider's file. Reports will be generated or produced on a monthly basis to monitor compliance with the 100 percent Standard. Further data analysis and reporting will be generated automatically, based on pre-approved templates, as required by both the QASP and as directed by the Program Director for easy retrieval and viewing.	
Metric --Network Refresher training Contactor provides 100 percent of provider network refresher training annually	**Standard** – 100 percent
Methods to Monitor, Collect Data, and Report the Metric -- As with internal staff, network providers receive annual refresher training. These trainings will be available electronically and via teleconference throughout the year with results collected and reported in NetworkConnect in the providers file. Further data analysis and reporting will be generated automatically, based on preapproved templates, as required by both the QASP and as directed by the Program Director for easy retrieval and viewing.	

NON-MEDICAL COUNSELING

QASP Metric	
Face-to-Face, Non-medical Counseling	
Metric --Clinical Quality of STSF Cases (as measured through clinical supervision)	**Standard** – 95 percent
Methods to Monitor, Collect Data, and Report the Metric -- The quality of EAP cases is defined as the thoroughness of the case assessment performed by the Military OneSource Face-to-Face Counselor, which will be measured through monthly audits. Based on a random sample of cases, selected from among those receiving supervisory review, the Military OneSource Face-to-Face Counselor will be required to meet a minimum threshold of 95 percent accuracy to demonstrate quality clinical services were successfully identified and provided. Although the COA standard does not specify a number or percentage of cases to be reviewed, the sample size will be sufficiently large enough to provide 90 percent annual confidence in the results +/- 5 percent. The following critical issues will be reviewed to determine clinical quality: presenting concern, assessment of any Military history, Member safety issues including suicidality, homicidality and domestic violence, substance abuse history, support system availability, whether services delivered fall within Military OneSource program scope, and action plan. Quality staff will audit results and review with Military OneSource counseling staff. Aggregate performance reports will be used to identify training opportunities or areas where personnel might benefit from review. If it is noted that a Military OneSource Face-to-Face Counselor does not adequately meet this threshold corrective action will be taken. Further data analysis and reporting will be generated automatically, based on preapproved	

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QASP Metric
templates, as required by both the QASP and as directed by the Program Director for easy retrieval and viewing.

Case information is furnished to provider of services prior to scheduled appointment and/or within 3 business days	**100 percent**
This information includes the authorization with member name and number of visits authorized as well as the Statement of Understanding which describes the scope of Military OneSource nonmedical counseling and the Case Activity Form which is used for case reporting and payment. In addition, the authorization, Statement of Understanding and Case Activity Form will be sent via USPS. Reporting will be used to monitor timeliness of these functions both online and through mailing function. In the event documentation needs to be sent urgently, the Consultant will fax or email (via secure email) the information to the provider and document this transmission in the case.	
Metric --Urgent STSF Cases scheduled for face-to-face appointment within one business day	**Standard** – 92 percent
Methods to Monitor the Metric -- All Military OneSource cases will be rated within the CareConnect Case Management system for acuity and immediacy of need. Urgent cases will be identified within the system and a resolution code inserted when the appointment has been scheduled. Reports will be generated daily to monitor the timeliness of urgent appointments. Further data analysis and reporting will be generated automatically, based on preapproved templates, as required by both the QASP and as directed by the Program Director for retrieval/viewing.	
Metric --Non-Urgent STSF Cases scheduled for face-to-face appointment within three business days	**Standard** – 92 percent
Methods to Monitor the Metric -- Non-Urgent Military OneSource cases will be coded and tracked within the case tracking system with the date entered in the resolution code when the appointment has been scheduled. If the warm transfer results in an appointment being scheduled within three days or at the member's convenience, the metric will be determined to have been met. If a message is left on the provider's voice mail, two follow up calls will be made to the member within two days to determine if an appointment has been scheduled within three days or at a convenient time for the member. Should the outreach not result in being able to connect with the member, an outreach call will be made to the provider to determine whether or not an appointment was scheduled. If efforts to reach the member by the Consultant or the provider resulted in no call back, the case will be excluded from the denominator in calculating the metric. Weekly reports will be used to monitor the timeliness of appointments. Further data analysis and reporting will be generated automatically, based on pre-approved templates, as required by both the QASP and as directed by the Program Director for easy retrieval and viewing.	
Metric --Case information posted to CMS	**Standard** – 95 percent
Methods to Monitor, Collect Data, and Report the Metric -- All incoming case information from The ValueOptions Team's Military OneSource subcontractors and other appropriate agencies will be date stamped upon receipt and entered into the CareConnect system within three business days. This information includes the Case Activity Form, requested case session notes, and any formal documents such as release of information or copies of written reports supplied to treatment programs, government or local agencies, daily audits will be performed by supervisory staff to monitor the timeliness of this data entry. Further data analysis and reporting will be generated automatically, based on preapproved templates, as required by both the QASP and as directed by the Program Director for easy retrieval and viewing.	
Metric -- Service Breakdowns** as a Percentage of Cases **Any failure in service as recorded by the Service Member or family member	**Standard** – <0.5 percent of all face-to-face STSF cases
Methods to Monitor, Collect Data, and Report the Metric --Should we receive complaints from Members regarding their perceived failure to obtain appropriate services, this will be documented in the ServiceConnect system. Reports identifying these complaints will be generated by KnowledgeConnect and corrective actions implemented as needed. In addition, we will respond to the Member regarding their feedback within 48 hours of receipt of the complaint. Further data analysis and reporting will be generated automatically, based on preapproved templates, as required by both the QASP and as directed by the Program Director for easy retrieval and viewing.	

Financial Counseling	
Quality of financial cases as measured through supervision	**95 percent**
Methods to Monitor, Collect Data, and Report the Metric – The quality of financial cases is defined as the thoroughness of the assessment performed by the financial counselor which will be measured through monthly audits**.** Based on a random sample of cases, each financial Counselor will be required to meet a minimum threshold of 95 percent accuracy to demonstrate quality services were successfully provided. Quality staff will audit results and review them with the financial counseling staff. Aggregate performance reports will be used to identify training opportunities or areas where	

SOURCE SELECTION INFORMATION–See FAR 2.101 and 3.104
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QASP Metric	
personnel might benefit from review. If it is noted that a financial Counselor does not adequately meet this threshold corrective action will be taken. Further data analysis and reporting will be generated automatically, based on preapproved templates, as required by both the QASP and as directed by the Program Director for easy retrieval and viewing.	
Urgent financial cases scheduled for appointment within one business day	92 percent
Methods to Monitor the Metric -- Urgent cases will be identified within the CareConnect Case Management system and a resolution code inserted when the appointment has been scheduled. Reports will be generated daily to monitor the timeliness of urgent appointments. Further data analysis and reporting will be generated automatically, based on preapproved templates, as required by both the QASP and as directed by the Program Director for easy retrieval and viewing.	
Non-urgent financial cases scheduled for appointment within three business days	92 percent
Methods to Monitor the Metric -- Non-Urgent Military OneSource cases will be coded and tracked within the case tracking system with the date entered in the resolution code when the appointment has been scheduled. Weekly reports will be used to monitor the timeliness of appointments. Further data analysis and reporting will be generated automatically, based on pre-approved templates, as required by both the QASP and as directed by the Program Director for easy retrieval and viewing.	
Case information posted to CMS within three business days of receipt	95 percent
Methods to Monitor, Collect Data, and Report the Metric -- All relevant incoming case information from the Military OneSource subcontractors and other appropriate agencies will be date stamped upon receipt and entered into the CareConnect system within three (3) business days. Daily audits will be performed by supervisory staff to monitor the timeliness of this data entry. Further data analysis and reporting will be generated automatically, based on preapproved templates, as required by both the QASP and as directed by the Program Director for easy retrieval and viewing.	
Case information is furnished to provider of services prior to scheduled appointment and/or within three business days	100 percent
Case information for referrals to financial counseling is posted real time in the case management system. Telephonic financial counselors have access to this information directly prior to beginning the financial counseling session or within 3 business days of the session. Measurement of this standard will be tracked within the financial counseling audit process and reports will be generated with summaries of composite audit scores. Case information for participants referred for face to face financial counseling will be sent either electronically or by fax to the financial consultant within 3 business days of the scheduled appointment. The case tracking system will indicate the date the case information was sent in order to measure adherence to this standard. Monthly reports will be produced to confirm the sending of the case information.	
Metric -- Service Breakdowns** as a Percentage of Cases **Any failure in service as recorded by the Service Member or family member	**Standard – <0.5 percent of all financial counseling cases**
Methods to Monitor, Collect Data, and Report the Metric --Should we receive complaints from Members regarding their perceived failure to obtain appropriate services, this will be documented in the ServiceConnect system. Reports identifying these complaints will be generated by KnowledgeConnect and corrective actions implemented as needed. In addition, we will respond to the Member regarding their feedback within 48 hours of receipt of the complaint. Further data analysis and reporting will be generated automatically, based on preapproved templates, as required by both the QASP and as directed by the Program Director for easy retrieval and viewing.	
Health and Wellness Coaching	
Quality of health and wellness cases (as measured through clinical supervision)	95 percent
Methods to Monitor, Collect Data, and Report the Metric -- The quality of telephonic health and wellness cases is measured through an audit tool specific to this function. Based on a random sample of cases, each Military OneSource health and wellness coach will be required to meet a minimum threshold of 95 percent accuracy to demonstrate quality coaching services were successfully identified and provided. Aggregate performance reports will be used to identify training opportunities or areas where personnel might benefit from review. If it is noted that a Military OneSource health and wellness coach does not adequately meet this threshold corrective action will be taken. Further data analysis and reporting will be generated automatically, based on preapproved templates, as required by both the QASP and as directed by the Program Director for easy retrieval and viewing.	
Urgent health and wellness cases scheduled for appointment	92 percent

QASP Metric	
within 1 business day	
Methods to Monitor the Metric -- Urgent cases will be identified within the system and a resolution code inserted when the appointment has been scheduled. Reports will be generated daily to monitor the timeliness of urgent appointments. Further data analysis and reporting will be generated automatically, based on preapproved templates, as required by both the QASP and as directed by the Program Director for easy retrieval and viewing.	
Non-urgent health and wellness cases scheduled for appointment within 3 business days	**92 percent**
Methods to Monitor the Metric -- Non-Urgent Military OneSource cases will be coded and tracked within the case tracking system with the date entered in the resolution code when the appointment has been scheduled. Weekly reports will be used to monitor the timeliness of appointments. Further data analysis and reporting will be generated automatically, based on pre-approved templates, as required by both the QASP and as directed by the Program Director for easy retrieval and viewing.	
Case information posted within 3 business days	**92 percent**
Methods to Monitor, Collect Data, and Report the Metric -- All relevant case information from The ValueOptions health and wellness telephonic coaching team will be entered directly into the case tracking system within 3 days of case conclusion. Weekly audits will be performed by supervisory staff to monitor the timeliness of this data entry. Further data analysis and reporting will be generated automatically, based on preapproved templates, as required by both the QASP and as directed by the Program Director for easy retrieval and viewing.	
Case information is furnished to provider of services prior to scheduled appointment and/or within 3 business days	**100 percent**
Case information for referrals to coaching is posted real time in the case management system. Health and wellness coaches access this information directly either prior to beginning the coaching session or within 3 business days of the coaching session. Measurement of this standard will be tracked within the coaching audit process and reports will be generated with summaries of composite audit scores.	
Metric -- Service Breakdowns** as a Percentage of Cases **Any failure in service as recorded by the Service Member or family member	**Standard – <0.5 percent of all coaching cases**
Methods to Monitor, Collect Data, and Report the Metric --Should we receive complaints from Members regarding their perceived failure to obtain appropriate services, this will be documented in the ServiceConnect system. Reports identifying these complaints will be generated by KnowledgeConnect and corrective actions implemented as needed. In addition, we will respond to the Member regarding their feedback within 48 hours of receipt of the complaint. Further data analysis and reporting will be generated automatically, based on preapproved templates, as required by both the QASP and as directed by the Program Director for easy retrieval and viewing.	
Metric --Case information transferred to 1-800/website contractor within three business days of case closure	**Standard** – 95 percent
Methods to Monitor, Collect Data, and Report the Metric -- All incoming case information from ValueOptions' Military OneSource subcontractors and other appropriate agencies will be date stamped upon receipt and entered into the CareConnect system within three business days. Subcontractors have incentive to comply with 3-day metric because in return for compliance, ValueOptions pays 95 percent of their invoice. Data analysis and reporting will be generated automatically, based on preapproved templates, as required by both the QASP and as directed by the Program Director for easy retrieval and viewing.	
Wounded Warrior Resources	
Cases resolved within 96 hours	**100 percent**
Methods to Monitor, Collect Data, and Report the Metric -- All relevant case information from the Wounded Warrior Resources will be entered into the case tracking system. Resolution date will be entered at the time the case is resolved and weekly reports will be run to confirm the timeliness of resolution. Further data analysis and reporting will be generated automatically, based on preapproved templates, as required by both the QASP and as directed by the Program Director for easy retrieval and viewing.	
Joint Family Support Assistance Program - TBD	
Spouse Education and Career Opportunities - TBD	

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ValueOptions also proposes the following additional quality performance metrics that we routinely measure for our EAP and Work/Life services.

I.   92 percent of Military OneSource Consultants will score 90 percent or higher on call audits. Call audits are conducted by a quality auditor using a standard audit tool.
II.   Conduct 100 percent annual subcontractor audit which includes an annual development plan for program development and overall quality.
III.   ValueOptions will correct any website errors brought to their attention within three business days of notification and all Web content will be reviewed by qualified professionals trained in the area of the information provided.

The Military OneSource QA program is intended to monitor the structure and processes that lead to the desired outcomes for Members and MC&FP program staff. The QM team examines the processes of each department within the program including:

- Clinical Services
- Quality Indicators/Outcomes Management
- Network/Management/Provider Relations
- Service Availability and Access to Care
- Provider Quality Profile

- Customer Service
- Complaints and Grievances
- Staff and Provider Training
- Cultural Competency
- Prevention

Quality Assurance Program (QAP). The purpose of our QAP is to assure the quality and safety of both non-medical and administrative services, and to continuously improve both of these. The Military OneSource QAP assures the:

- involvement and input from representatives of all stakeholder groups in the Quality Assurance Program
- development and promotion of efficient, non-intrusive, yet effective and quality-based systems to manage Military OneSource Member needs
- provision of meaningful, actionable feedback to the stakeholders regarding the performance of the company and their involvement in decisions regarding next steps
- measurement of the impact and outcome of services
- promotion of quality services via the use of empirically-based guidelines

Quality Management Work Plan. Each year, the Military OneSource QAP will formulate a work plan that includes goals and the actions that are necessary to achieve those goals. Monitors of almost every aspect of our operation are developed and maintained. The collection of data for each measure is only begun after consistent data collection methodology has been established. The data that results from these monitors is audited for accuracy, aggregated, and then reviewed, trended and analyzed by multi-disciplinary, multi-functional area teams. When opportunities for improvement are identified, they are prioritized based on a risk assessment, ability to impact performance, and resource availability. Thoughtful identification of interventions that are powerful enough to impact performance is the next step in the process. Multi-departmental teams, including the line staff who will need to implement the new process, design the interventions and workflows. Barriers to improving the process or outcome are identified and problem solving conducted to determine the best ways to overcome the barriers. Once the intervention is implemented, these process-improvement teams continue to meet and examine the impact

the intervention is having on our operation. Finally, re-measurement at appropriate intervals is conducted. The re-measurement data is analyzed in order to determine the impact of the intervention. Where performance is not acceptable, the cycle begins again.

Annual Quality Assurance Program Evaluation. On an annual basis, the Military OneSource QAP will be reviewed and evaluated. As a result of this analysis of the previous year's findings, activities that need to be carried over into the next year are identified, and new activities proposed. The annual evaluation may also lead to identification of educational/training needs, the establishment and/or revision of policies and procedures, or the alteration of operations to minimize risks in the delivery of care and service. The Director of Quality Assurance reviews all documents. The ValueOptions Team maintains quality processes and procedures in our internal operations to ensure the quality of all aspects of our operations as reflected in this proposal. We promote a culture of continuous quality improvement and instill a desire for achieving high quality results in all staffs.

PWS 7.3.1.3 RECORDS AND REPORTS PERTAINING TO QUALITY ASSURANCE

ValueOptions has developed a suite of reports which address each of the items identified in the QASP as areas of focus. These reports will be reviewed internally at ValueOptions to identify immediate process improvement opportunities and will form the foundation for discussion with the Military OneSource Quality Team to provide accountability and confirmation of service delivery in accordance with standards. Reports will be further reviewed over time to identify trends and to provide data that will guide ongoing program quality initiatives.

PWS 7.3.1.4 QUALITY CONTROL COMPONENTS FOR NON-MEDICAL COUNSELING SERVICES

The ValueOptions Team will continually monitor and identify areas throughout the program to provide the highest performance delivery of non-medical counseling services, including:

- regular monitoring and recording of actual calls received by counseling staff for accuracy, thoroughness and quality
- regular monitoring of case notes documented after each call to ensure that all key issues were identified addressed and recorded
- monitor Member satisfaction survey results as described in the QASP
- monitor information and data reported via ProviderConnect
- proactively respond to local and national events as warranted (e.g. a natural disaster such as a hurricane)
- regular and consistent training of Counselors to ensure updated skills, continuing education credits are maintained and staff satisfaction with job duties
- ongoing training and review of relevant military issues (e.g. additional training in suicide prevention based on recent media reports)

PWS 7.3.1.5 QUALITY CONTROL SUPPORT TEAM FOR NON-MEDICAL COUNSELING SERVICES

ValueOptions will provide a quality control support team for all non-medical counseling. This team will be responsible for conducting a random sample of non-medical counseling cases for audit purposes.

Random samples will target a 90 percent annual confidence rate +/- five percent. ValueOptions also records 100 percent of all incoming calls to the dedicated Military OneSource number when agreed to by the caller. This allows us to not only audit case records within our system, but to also listen to a random sample of calls for both appropriateness of the triage assessment and referral, as well as our standards around good customer service. This same team will be responsible for reviewing 100 percent of all cases involving an adverse incident. The quality support team is comprised of supervisors, members of the quality department, and our Director of Non-Medical Counseling.

PWS 7.3.1.6 NETWORK ADEQUACY

ValueOptions offers access to a national network of credentialed EAP professionals which we believe will adequately address the access needs for the Military OneSource program. In the rare event that access standards cannot be met, a Corrective Action Plan will be implemented and monitored regularly to ensure swift compliance with these time standards. In the interim, if necessary, we will implement a Single Case Agreement with a non-network professional to render services to the Military OneSource Member. This provider will meet all quality and licensure standards as required. It has been our experience in remote geographic locations (e.g. Alaska) that when a Single Case Agreement has been implemented, we have been successful in subsequently bringing that provider into our Network.

PWS 7.4 MILITARY ONESOURCE PROGRAM TRANSITION AND SECTION L17, FACTOR 1, 4.C

PWS 7.4.1 PROCESS FOR TRANSFERRING SERVICES AND ASSOCIATED DATA

The modified ValueOptions Transition Plan, provided as **Attachment 1**, describes our process for seamlessly transferring all Military OneSource services and associated data. We have augmented our original plan to now include additional information on task dependency and task overlap. In the absence of an official start date for transition, we have provided durations (in days) for each task. Once an official date has been set, modifications can be made to the plan to incorporate actual dates. This plan can be presented to the Government in Microsoft Project or Excel at the Government's request.

PWS 7.4.2 QUALITY ASSURANCE MEASURES IN TRANSITION PLAN AND PLAN FOR MANAGING RISK FACTORS

Our modified Transition Plan, provided as **Attachment 1**, includes quality assurance measures that will allow the government to monitor our performance as the current Military OneSource contractor. The Plan also includes transition risk factors and our plans for managing those potential risks.

PWS 7.4.3 TRANSITION REPORTING REQUIREMENTS

The ValueOptions Team will provide reports on all aspects of the Military OneSource transition, including call center, reports, disaster recovery, general education/materials, all non-medical counseling, all Military OneSource centers, and all program oversight. These reports will be available every two weeks. As needed, ValueOptions Program Director or designee and other identified staff will be available to attend face-to-face update meetings at the contracting officer's headquarters in Herndon, Virginia.

COVER AND TITLE PAGE

L.14. Introduction and General Instructions

Title of Proposal: Military Community and Family Policy Support Services, Military OneSource Program
RFP Number: D13PS00423
Proposal Volume and Number: Volume II: Cost (Factor 3)
Offeror's Name: ValueOptions, Inc.

L.9 Proprietary Data Caveat

This proposal includes data that shall not be disclosed outside the Government and shall not be duplicated, used, or disclosed -- in whole or in part -- for any purpose other than to evaluate this proposal. If, however, a contract is awarded to this Offeror as a result of -- or in connection with -- the submission of this data, the Government shall have the right to duplicate, use, or disclose the data to the extent provided in the resulting contract. This restriction does not limit the Government's right to use information contained in this data if it is obtained from another source without restriction. The data subject to this restriction are contained in sheets [Volume II. Cost, Factor 3—Tab C. Cost Realism Narrative pages 1-30; Tab D. Labor Rates pages 1-5, Productive Hours page 1, Auxiliary Supporting Price Data page 1-54, Summary of Indirect Rates pages 1-6, Professional Compensation Plan Pricing pages 1-4, Subcontracting Plan Pricing pages 1-22, CLIN Structure Attachment J-1 pages 1-3; Tab E. Subcontracting Plan, including Teaming Agreements, in its entirety; Tab F. Professional Compensation Plan in its entirety.]

L.14 Submission Requirements

Company Name	A. Tax ID No.	B. DUNS No.	C. NAICS Code(s)	D. Contact Name and E. Email Address	F. Contact Phone Number	G. Contact Fax Number	H. Complete Business Mailing Address
ValueOptions, Inc. (Prime)	54-1414194	088192141	624190	Kerry Mooney kerry.mooney@valueoptions.com	(757) 459-5331	(757) 892-5772	240 Corporate Blvd Norfolk, VA 23502
WorkPlace Options, Inc.	20-2699271	196179667	624190	Alan King alank@workplaceoptions.com	(919) 880-4136	(919) 871-5779	3020 Highwoods Boulevard Raleigh, NC 27604

Company Name	A. Tax ID No.	B. DUNS No.	C. NAICS Code(s)	D. Contact Name and E. Email Address	F. Contact Phone Number	G. Contact Fax Number	H. Complete Business Mailing Address
Comprehensive Language Center	54-1897768	026827662	541930	Perry Konstas pkonstas@comprehensivelc.com	(703) 247-0712	(703) 247-4292	2200 Wilson Boulevard, Suite 500, Arlington, VA 22201
RR Donnelley	36-1004130	005119573	323111	Jeff Sumner jeff.sumner@rrd.com	(757) 473-0026	(757) 473-1156	111 Wacker Drive Chicago, IL 60606
HRB Tax Group, Inc.	43-1871840	062675611	541213	Heather Watts hwatts@hrblock.com	(816) 854-5353	(816) 854-8501	One H&R Block Way Kansas City, MO 64015
The Bowen Group	20-4032003	602739695	624190	Tom Mayberry tmayberry@bowenconsulting.com	(540) 658-0490	(540) 658-1651	10 Center Street, Suite 103 Stafford, VA 22556
Able Forces	27-0881311	831883371	624190	Joe Cunningham Joe.cunningham@ableforces.org	(540) 631-9600	(540) 635-2083	115 Chester Street, Suite B Front Royal, VA 22630
MVLE	54-0901005	099855835	541213	Ken Rush ken@mvle.org	(540) 815-8444	(703) 569-3932	7420 Fullerton Road Springfield, VA 22153
Linden Resources	54-0660113	077818703	561421	Marshall Henson Mhenson@linden.org	(703) 299-3235	(703) 299-8395	750 South 23rd Street Arlington, VA 22202

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