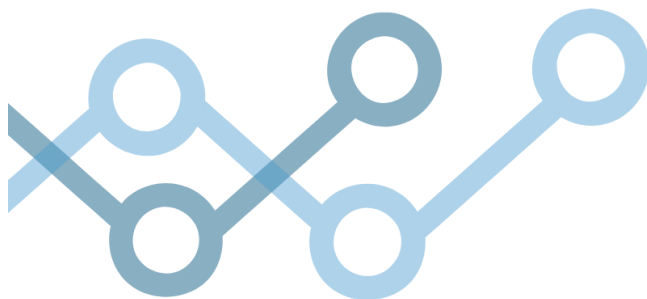




**NIH Office of Human Resources (OHR)
Data Bootcamp
RFQ Number: 75N98021Q00038**

Proposal Volume 1: Technical



Prepared for:
National Institutes of Health
6011 Executive Blvd.
Room 529S
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1.0 Business Quote Cover Sheet

RFQ Number: 75N98021Q00038

Program: NIH Office of Human Resources (OHR) DATA BOOTCAMP

Government Point of Contact (POC):

Mr. Zedekiah J. Worsham (Contracting Officer),
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Contractor:

Sophinea Corporation, 10811 Heaven Scent Lane, Manassas, VA 20110-2802

Size Status on GSA Federal Supply Schedule:

Sophinea Corporation qualifies as a Small Business under its GSA Federal Supply Schedule -
GSA Multiple Award Schedule (MAS) contract, 47QTCA21D00AQ.

Corporate Contact and Contract Administration POC:

Primary: Brian G. Thamm, President & CEO, Sophinea Corporation, Cell: 571-206-0852, Fax:
000-000-0000, Email: bthamm@sophinea.io
Alternate: Erik G.. Thamm (CSO), Cell: (703) 402-1757, E-mail at ethamm@sophinea.io.

Quote Statement:

By submitting this quote, Sophinea Corporation, if selected for discussions, grants the contracting officer authorized representative the right to examine, at any time before award, any documents, or other records directly pertinent to the information requested or submitted. Sophinea accepts the Terms & Conditions of the RFQ and all amendments.

Validity Period:

As requested, the quote is valid for 120 days from quote due date.



Brian G. Thamm
President & CEO, Sophinea Corporation

Date: August 23, 2021

2.0 Executive Summary

Sophinea Corporation, a Small Business which is focused on providing leading edge Data Analytics and Analysis solutions to Federal, State, and Local government agencies, is pleased to provide our proposal in response to RFQ 75N98021Q00038 for the program entitled "NIH Office of Human Resources (OHR) DATA BOOTCAMP."

Team Sophinea, composed of Sophinea and its partner ITCI which is a well known federal government training company and a company Sophinea has a close working relationship of over three (3) years, are long-time Data Analytics training collaborators with NIH OHR, with experience in both virtual and on-site training. Our team is fully committed to support this NIH training program through a successful completion.

This proposal is submitted via email as two separate documents/attachments: "Volume I: Technical Proposal" and "Volume II: Price Quote".

3.0 Understanding of NIH OHR Data Bootcamp Requirements

OHR NIH requires a tailored and focused Data Bootcamp (Data Management and Analytics) program for supervisory and non-supervisory employees. This program provides a conceptual and working knowledge of data management and analysis to meet the data-driven objectives of the National Institutes of Health (NIH) Office of Human Resources (OHR). The NIH OHR shall develop newer and current employees with data management and analysis skills to develop solutions for internal and external customers or stakeholders. This Data Bootcamp program provides this target group with knowledge and proficiency in how data is important to an organization, and skill development in collection, analysis, and communication of data, for the NIH OHR.

Data-driven decision-making is foundational for targeted customer solutions. The NIH OHR has identified Data Management and Analysis as a core organizational objective for servicing its internal and external OHR partners. Sophinea Corporation shall provide a practical program for employees who utilize data in helping their customers and stakeholders make informed decisions. Understanding data science - its role within the organization and the techniques for collecting, analyzing, and communicating data - is essential in elevating the customer experience.

The NIH OHR Engagement and Development Branch (EDB) is an instrumental partner in helping the OHR organization meet its data science objectives. Its goal is to provide a data management/analytics program, - referred to as the "Data Bootcamp" or (DB). Sophinea will work with NIH OHR to develop a program based on the format outlined in the following section. This format was proposed by a Data Workgroup tasked with developing a solution for meeting NIH OHR's data knowledge and aptitude objectives.

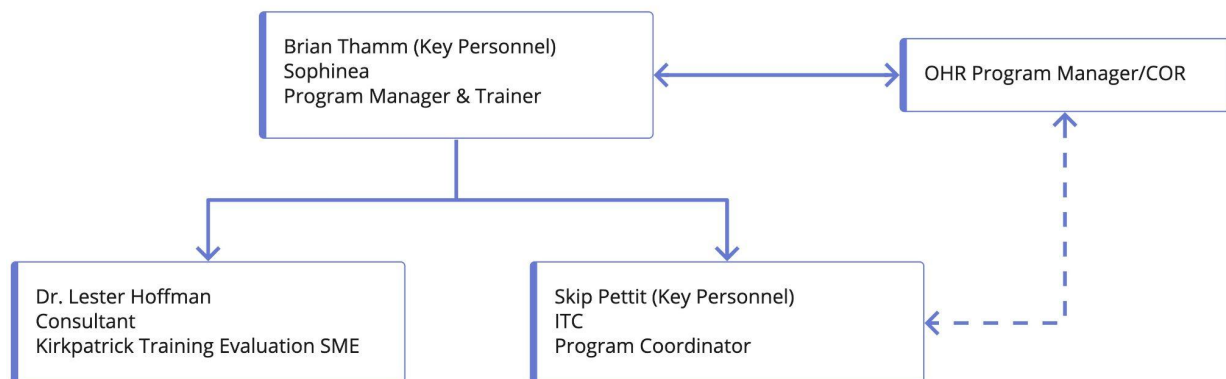
**Sophinea's Experience Delivering Data and Analytics Training
(Highlights five (5) training programs with NIH, Army and State)**

Data and Analysis Topics Covered	NIH OHR	Department of Army (CIO/G6)	Department of Army (CIO/G6)	Department of State - US Refugee Program	Department of State (CA)
Introduction to Data Analytics	✓	✓	✓	✓	✓
Data Collection	✓	✓	✓	✓	✓
Data Management and Analysis	✓	✓	✓	✓	✓
Visualization and Storytelling	✓	✓	✓	✓	✓

4.0 Key Personnel and Personnel Management

Key Personnel: *Brian Thamm (Sophinea)* will serve as the primary point of contact (POC) for NIH OHR's Program Manager/COR regarding contractual matters. Brian is ultimately responsible for managing efforts related to managing, designing, and integrating the program. As President and CEO of Sophinea, Brian has full control over corporate resources and decisions to be made on behalf of the organization.

Project Organizational Chart



Brian Thamm will also serve as the primary training developer and instructor. Brian has over 5 years experience developing and delivering Human Resources-focused data and analytics training (HR). This includes developing Data Collection and Analytics training for NIH OHR. Brian understands the use cases and practical challenges of collecting, cleansing, and developing insights from Human Resources data. This enables him to develop domain-relevant training under this project. Brian also has practical experience using industry leading data and analytics tools. His prior current and prior experience developing on premise and cloud-based solutions for CSC and the Department of State (DoS) enables Brian to speak to common challenges that data analysts experience when attempting to derive insight from data and is familiar with the state of the art in a rapidly evolving data and analytics space.

- Brian Thamm’s Resume can be found in Appendix I
- Brian Thamm is a current Sophinea Employee

Key Personnel: Skip Pettit (ITC) will serve as the Program Coordinator for the program. In the role as Program Coordinator, Skip will be delegated responsibility to coordinate non-contractual activities on the project. This includes ensuring that all training aligns with industry best practices and that all training logistics are handled per the program schedule. Skip will also provide valuable SME-level insight, leveraging years of experience working with NIH OHR to ensure all training materials are tightly aligned with their mission.

Skip Pettit is a recognized subject matter expert in HR training and consulting at NIH. He also brings expertise in Leadership, Unconscious Bias, EEO, Sexual Harassment Awareness & Prevention, Diversity, Equity & Inclusion (DE&I), Micro-Messaging, and Leadership & Supervision. He has trained more than 100,000 federal professionals in 30+ agencies.

- Skip Pettit’s Resume can be found in Appendix I
- Skip Pettit’s Letter of Commitment can be found in Appendix II

Contractor - Dr. Lester Hoffman will conduct the Kirkpatrick Level 2 evaluations. Dr. Hoffman will report directly to Brian Thamm as the Program Manager for this project. His vast experience provides value to NIH OHR through employing proven methods to validate the effectiveness of coursework through measuring increased mastery of topics from training.

Dr. Hoffman is extremely experienced with over 25 years’ experience in planning and conducting Kirkpatrick Evaluation Processes, Levels 1 through 4. He has designed/conducted 350 processes at all 4 levels, including over 100 Level 2 processes - designing more than 2,000 Mastery Test Questions (Level 2) for such clients as: USDA, VA, IBB, HHS, AT&T, Citigroup, Novartis, Merck, and others. In addition, Dr. Hoffman has taught postgraduate level workshops at the NYU Management Institute on Training Evaluation.

- Skip Pettit’s Resume can be found in Appendix I

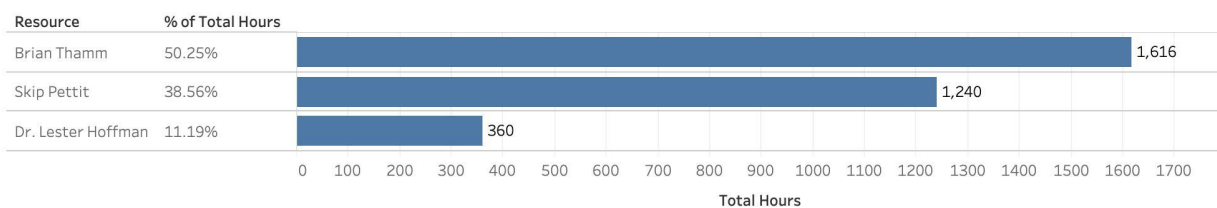
- Skip Pettit's Letter of Commitment can be found in Appendix II

Project Hours Breakout:

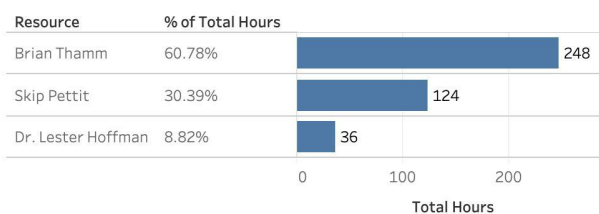
The below chart shows the hours breakout by resource, during the entire program. The hours for Base Year 1 - Cohort one are displayed separately as the hours distribution for that cohort will be different from the others. This is due to the upfront creation of the content. We anticipate and have budgeted for adjustments for subsequent cohorts, but expect the hours necessary for these adjustments to be much lower than initial development.

Hours Breakout

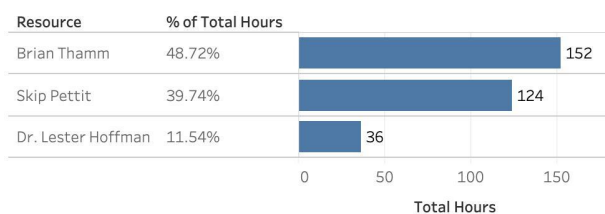
Hours Breakout For Entire Program



Hours Breakout for Base Year 1 - Cohort 1



Hours Breakout for Sessions After Base Year - Cohort 1



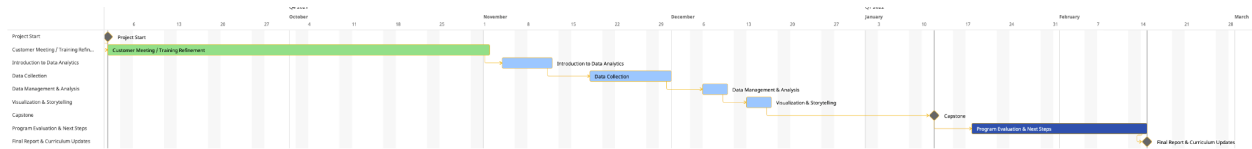
5.0 Technical Approach

Sophinea will deliver training to two cohorts, with up to 16 participants in each cohort. Training courses will range from half-day to multi-day training. Full and multi-day training may be divided across multiple days. The final duration and scheduling of sessions will be determined post-award in collaboration with NIH OHR and will take into consideration factors such as staff and facility availability. This training will be customized to meet the needs of OHR, but will build upon instructional methods and content that are proven to develop mastery in Data and Analytics. This training will be designed using the concepts of serial learning, where each session will build on prior knowledge to improve memorization and mastery. In addition, a key component of Sophinea's curriculum design will be to provide a simulated learning environment where instruction will be led by data and analytics experts that are practitioners and have experience applying Data and Analytics to HR use cases. These instructors have experience effectively delivering data and analytics training to NIH OHR, The Department of the Army, and at the Department of State. This combination of domain-relevant, real world experience and instructional experience provides significant value to OHR. It enables learnings to be tied to

relevant scenarios and provides for better perspectives regarding how to approach practical data analysis requirements.

Overall Schedule (Further details in the below sections):

Cohort 1:



Cohort 2:



5.1 Assessments

5.1.1 Kirkpatrick Level 2 Evaluations

The program will use a Kirkpatrick Level 2 evaluation process. Kirkpatrick Level 2 Evaluation is the training industry gold standard used to demonstrate training effectiveness. The results from the Sophinea process will provide NIH OHR quantitative and qualitative evidence of the positive impact of their training investment in the Data Bootcamp.

The Kirkpatrick Level 2 Evaluations will be conducted by utilizing, for each of the four (4) separate classes, a test comprising 10 multiple choice questions asked of each trainee, pre-class and post-class. These pre-test and post-test results will then be compared to verify the degree of increase in learning that has occurred, thereby validating course effectiveness. The data for the student population will be analyzed after each class occurrence to serve as the basis of enhancing and focusing the class training materials. After all four (4) classes have been completed, a final Compilation Report will be provided to NIH that will assess student mastery throughout the entire program, and also provide recommendations for course enhancement for upcoming cohorts.

5.2 Training Program Development

5.2.1 Pre-Training Collaboration with NIH OHR EDB

Sophinea will work closely with the NIH OHR EDB representative, and other parties as identified, during the program development phase to ensure content meets developmental

needs and expectations. This includes emails, phone calls and occasional in-person and virtual meetings as required. Prior to training, Sophinea will participate with the client in the below preparation sessions. We have proposed the below dates for these activities to occur. However, we agree these dates may move based on staff and participant availability.

Cohort 1:

- **9/1/21:** Participate in kickoff meeting with client and stakeholders
- **9/22/21:** Participate in meeting to develop pre-program and post-program assessments
- **9/2/21 - 10/31/21:** Develop and deliver training guides and supporting materials for the training courses
- **11/1/21:** Attend cohort orientation

September 2021

Today < > September 2021

Month 2 week Week 3 day Day See records

Sun	Mon	Tue	Wed	Thu	Fri	Sat
29	30	31	1 Kickoff meeting	2 Develop and deliver electronic (PDF) content for the training courses	3	4
5 Develop and deliver electronic (PDF) content for the training courses	6	7 +	8	9	10	11
12 Develop and deliver electronic (PDF) content for the training courses	13	14	15	16	17	18
19 Develop and deliver electronic (PDF) content for the training courses	20	21	22 Assessment Meeting	23	24	25
26 Develop and deliver electronic (PDF) content for the training courses	27	28	29	30	1	2

October 2021

Today < > October 2021

Month 2 week Week 3 day Day See records

Sun	Mon	Tue	Wed	Thu	Fri	Sat
26	27	28	29	30	1	2
Develop and deliver electronic (PDF) content for the training courses						
3	4	5	6	7	8	9
Develop and deliver electronic (PDF) content for the training courses						
10	11	12	13	+ 14	15	16
Develop and deliver electronic (PDF) content for the training courses						
17	18	19	20	21	22	23
Develop and deliver electronic (PDF) content for the training courses						
24	25	26	27	28	29	30
Develop and deliver electronic (PDF) content for the training courses						
31	1	2	3	4	5	6
Develop and deliver electronic (PDF) content for the training courses						

Cohort 2:

- **3/1/22:** Participate in kickoff meeting with client and stakeholders
- **3/2/22 - 4/30/22:** Develop and deliver training guides and supporting materials for the training courses
- **5/1/22:** Attend cohort orientation

March 2022

Today < > March 2022							Month	2 week	Week	3 day	Day	See records
Sun	Mon	Tue	Wed	Thu	Fri	Sat						
27	28	1 Kickoff meeting	2 Develop and deliver electronic (PDF) content for the training courses	3	4	5						
6	7	8	9	10	11	12	< Develop and deliver electronic (PDF) content for the training courses					
13	14	15	16	17	18	19	< Develop and deliver electronic (PDF) content for the training courses					
20	21	22	23	24	25	26	< Develop and deliver electronic (PDF) content for the training courses					
27	28	29	30	31	1	2	< Develop and deliver electronic (PDF) content for the training courses					

April 2022

Today < > April 2022							Month	2 week	Week	3 day	Day	See records
Sun	Mon	Tue	Wed	Thu	Fri	Sat						
27	28	29	30	31	1	2	< Develop and deliver electronic (PDF) content for the training courses					
3	4	5	6	7	8	9	< Develop and deliver electronic (PDF) content for the training courses					
10	11	12	13	14	15	16	< Develop and deliver electronic (PDF) content for the training courses					
17	18	19	20	21	22	23	< Develop and deliver electronic (PDF) content for the training courses					
24	25	26	27	28	29	30	< Develop and deliver electronic (PDF) content for the training courses					

5.2.2 Course Title: Introduction to Data Analytics

Course Description	Experience
Sophinea will provide training on the foundation elements of data analytics. Cohorts will leave the session with a thorough understanding of what data analytics comprises, why and how it has grown to become a critical capability for organizations, and the common attributes of successful data analytics programs.	Sophinea has over five years experience as a practitioner and providing formal and informal data analytics training in the Federal Government. This includes custom development of training that was delivered to the Department of the Army (G6) and through global data analytics modernization initiatives at the Department of State.

Staffing:

- Primary Instructor: Brian Thamm
- Program Coordinator: Skip Pettit
- Learning Lab Support: Brian Thamm and Skip Pettit
- Course Evaluation: Dr. Lester Hoffman

Duration: The course will be taught as a full day training, with the option to break the training into two, half-day training sessions. The class will start at 9am and run until 4pm. The instructor will open the webconference at 8:30.

Agenda:

Time	Duration	Description
9:00 am	0.5 hrs.	Introduction to Data Analytics Agenda Overview
9:30 am	0.5 hrs.	Introductions
10:00 am	1 hr.	Data Analysis: Defined
11:00 am	0.25 hrs.	Break
11:15 am	0.75 hrs.	Data Analytics Ecosystem
12:00 pm	1 hr	Lunch Break

1:00 pm	1 hr	Case Study: Opportunities and Challenges for Analytics in HR
2:00 pm	0.25 hrs.	Break
2:25 pm	0.75 hrs.	Case Study: Temple Health System
3:00 pm	0.75 hrs.	How to define use cases for Data Analytics in HR
3:45 pm	0.25 hrs.	Questions and Answers Discussion
4:00 pm	0	End of Day

Courseware: The course will be custom developed to meet NIH OHR requirements. It will be delivered using Zoom, PowerPoint, and Zoom Polls for additional classroom interaction. The instructor will use a Harvard Business Review Case Study and practitioner experience to provide real world examples of using analytics in HR and the necessary components to successfully apply data analytics in their day to day work.

Specific Technical Requirements: The course will be delivered virtually using Zoom. Students will require access to a computer that enables them to access Zoom.

Notional Schedule:

We have proposed below dates for these activities to occur. However, we agree these dates may move based on staff and participant availability.

Cohort 1:

- **11/4/21:** Deliver Introduction to Data Analytics course
- **11/11/21:** Support Introduction to Data Analytics lab

November 2021

Today < > November 2021							Month	2 week	Week	3 day	Day	See records
Sun	Mon	Tue	Wed	Thu	Fri	Sat						
31	1	2	3	4 Training	5	6						
7	8	9	10	11 Learning Lab	12	13						
14	15	16	17	18	19	20						
21	22	23	24	25	26	27						
28	29	30	1	2	3	4						

Cohort 2:

- **5/5/22:** Deliver Introduction to Data Analytics course
- **5/12/22:** Support Introduction to Data Analytics lab

May 2022

Today < > May 2022							Month	2 week	Week	3 day	Day	See records
Sun	Mon	Tue	Wed	Thu	Fri	Sat						
1	2	3	4	5 Training	6	7						
8	9	10	11	12 Learning Lab	13	14						
15	16	17	18	19	20	21						
22	23	24	25	26	27	28						
29	30	31	1	2	3	4						

5.2.3 Course Title: Data Collection

Course Description	Experience
Sophinea will provide training on best practices to develop a process-driven approach to data collection. This will include an overview of data collection and various approaches and methods to collect data. Cohorts will leave the session with a practical understanding of how to improve down-stream analytics processes through applying data collection best practices.	Sophinea has over five years experience as a data collection practitioner and providing formal and informal data collection training in the Federal Government. This includes custom development of data collection training that was delivered to NIH OHR.

Staffing:

- Primary Instructor: Brian Thamm
- Program Coordinator: Skip Pettit
- Learning Lab Support: Brian Thamm and Skip Pettit
- Course Evaluation: Dr. Lester Hoffman

Duration: The course will be taught as a full day training, with the option to break the training into two, half-day training sessions. The class will start at 9am and run until 4pm. The instructor will open the webconference at 8:30.

Agenda:

Time	Duration	Description
9:00 am	0.5 hrs.	Data Collection Agenda Overview
10:00 am	1 hr.	Data Collection Overview
11:00 am	0.25 hrs.	Break
11:15 am	0.75 hrs.	Data Collection Methods
12:00 pm	1 hr	Lunch Break
1:00 pm	1 hr	Data Collection Process
2:00 pm	0.25 hrs.	Break

2:25 pm	0.75 hrs.	Case Study: Tidy Up Your Company's Data
3:00 pm	0.75 hrs.	Student exercise: collecting data
3:45 pm	0.25 hrs.	Questions and Answers Discussion
4:00 pm	0	End of Day

Courseware: The course will be custom developed to meet NIH OHR requirements. It will be delivered using Zoom, PowerPoint, and Zoom Polls for additional classroom interaction. The instructor will use a Harvard Business Review Case Study and practitioner experience to provide real world examples of using analytics in HR and the necessary components to successfully apply data analytics in their day to day work.

Specific Technical Requirements: The course will be delivered virtually using Zoom. Students will require access to a computer that enables them to access Zoom.

Notional Schedule:

We have proposed below dates for these activities to occur. However, we agree these dates may move based on staff and participant availability. We expect this to be the case for this course in particular due to the Thanksgiving Holiday.

Cohort 1:

- **11/18/21:** Deliver Data Collection course
- **11/30/21:** Support Data Collection lab

November 2021

Today < > November 2021							Month	2 week	Week	3 day	Day	See records
Sun	Mon	Tue	Wed	Thu	Fri	Sat						
31	1	2	3	4	5	6						
7	8	9	10	11	12	13						
14	15	16	17	18	19	20						
21	22	23	24	25	26	27						
28	29	30	1	2	3	4						
		Learning Lab										
				Training								

Cohort 2:

5/19/21: Deliver Data Collection course

5/26/21: Support Data Collection lab

May 2022

Today < > May 2022							Month	2 week	Week	3 day	Day	See records
Sun	Mon	Tue	Wed	Thu	Fri	Sat						
1	2	3	4	5	6	7						
8	9	10	11	12	13	14						
15	16	17	18	19	20	21						
22	23	24	25	26	27	28						
29	30	31	1	2	3	4						
				Learning Lab								
				Training								

5.2.4 Course Title: Data Management and Analysis

Course Description	Experience
Sophinea will provide process-driven training on best processes related to data analysis. This will build upon the data collection activities and introduce common exploratory data analysis best practices using tools such as Microsoft Excel, PowerBI, and Qlik . The cohort will leave the session with an understanding of how to approach and explore single and multiple data sets for purposes of extracting meaning from data.	Sophinea has over five years experience as a data management and analysis practitioner and providing formal and informal data management and analysis training in the Federal Government. This includes custom development of data management and analysis training that was delivered to NIH OHR and Department of the Army Human Resources Command Personnel and leading the development of advanced HR data analytics initiatives at CSC (now GDIT).

Staffing:

- Primary Instructor: Brian Thamm
- Program Coordinator: Skip Pettit
- Learning Lab Support: Brian Thamm and Skip Pettit
- Course Evaluation: Dr. Lester Hoffman

Duration: The course will be taught as a full day training, with the option to break the training into two, half-day training sessions. The class will start at 9am and run until 4pm. The instructor will open the webconference at 8:30.

Agenda:

Time	Duration	Description
9:00 am	0.5 hrs.	Data Management and Analysis Agenda Overview
9:30 am	0.5 hrs.	Data and Analysis Process
10:00 am	0.5 hrs.	Common Data Files and Types
10:30 am	0.75 hrs.	Common Statistical Measures
11:15 am	0.25 hrs.	Break

11:30 am	0.75 hrs.	Cleaning and Organizing Data in Excel
12:15 pm	1 hr	Lunch Break
1:00 pm	0.75 hrs.	Analyzing Data in Excel
1:45 pm	0.25 hrs.	Break
2:00 pm	1 hrs.	Guided Full-lifecycle Analysis of HR Dataset using Excel
3:00 pm	0.45 hrs.	Introduction to PowerBI and Qlik using HR Dataset
3:45 pm	0.25 hrs.	Questions and Answers Discussion
4:00 pm	0	End of Day

Courseware: The course will be custom developed to meet NIH OHR requirements. It will be delivered using Zoom, PowerPoint, and Zoom Polls for additional classroom interaction. The instructor will use a representative HR dataset that is open source and contains no sensitive information to demonstrate Excel, PowerBI and Qlik capabilities using a .csv file.

Specific Technical Requirements: The course will be delivered virtually using Zoom. Students will require access to a computer that enables them to access Zoom and have Excel installed. PowerBI and/ Qlik will not be required, but students would be able to follow along with the instructor if those programs are available to the student.

Notional Schedule

We have proposed below dates for these activities to occur. However, we agree these dates may move based on staff and participant availability.

Cohort 1:

- **12/6/21:** Deliver Data Management & Analysis course
- **12/9/21:** Support Data Management & Analysis lab

December 2021

Today < > December 2021							Month	2 week	Week	3 day	Day	See records
Sun	Mon	Tue	Wed	Thu	Fri	Sat						
28	29	30	1	2	3	4						
5	6 Training	7	8	9 Learning Lab	10	11						
12	13	14	15	16	17	18						
19	20	21	22	23	24	25						
26	27	28	29	30	31	1						

Cohort 2:

- **6/2/22:** Deliver Data Management & Analysis course
- **6/9/22:** Support Data Management & Analysis lab

June 2022

Today < > June 2022							Month	2 week	Week	3 day	Day	See records
Sun	Mon	Tue	Wed	Thu	Fri	Sat						
29	30 +	31	1	2 Training	3	4						
5	6	7	8	9 Learning Lab	10	11						
12	13	14	15	16	17	18						
19	20	21	22	23	24	25						
26	27	28	29	30	1	2						

5.2.5 Course Title: Data Visualization and Storytelling

Course Description	Experience
Sophinea will provide training that utilizes best practices related to data visualization and storytelling. This session will build upon the data management and analysis session and cover best practices related to selection of appropriate charts, data encodings, and user interaction features to effectively deliver data insights. We will also cover the topic of data storytelling, which will include a foundation on the delicate balance between conveying data insights while avoiding biasing the user. The cohort will leave the session with confidence in their ability to convey insights effectively to the intended audience.	Sophinea has over five years experience as a data collection practitioner and providing formal and informal data visualization and storytelling training in the Federal Government. This includes custom development of data visualization and storytelling training that was delivered to the Department of the Army G6 and communicating data through visualization and storytelling to Senior Department of State staff.

Staffing:

- Primary Instructor: Brian Thamm
- Program Coordinator: Skip Pettit
- Learning Lab Support: Brian Thamm and Skip Pettit
- Course Evaluation: Dr. Lester Hoffman

Duration: The course will be taught as a full day training, with the option to break the training into two, half-day training sessions. The class will start at 9am and run until 4pm. The instructor will open the webconference at 8:30.

Agenda:

Time	Duration	Description
9:00 am	0.5 hrs.	Data Visualization and Storytelling Agenda Overview
9:30 am	1 hr.	Visual Analytics: Defined
10:30 am	0.45 hrs.	Data Encodings for Impactful Visualizations

11:15 am	0.25 hrs.	Break
11:30 am	0.75 hrs.	Case Study: Visualizations that Really Work
12:00 pm	1 hr	Lunch Break
1:00 pm	1 hr	Data Storytelling: Defined
2:00 pm	0.25 hrs.	Break
2:25 pm	1 hrs.	Case Study: From Data to Storytelling
3:25 pm	0.25 hrs.	Questions and Answers Discussion
3:30 pm	0	End of Day

Courseware: The course will be custom developed to meet NIH OHR requirements

Specific Technical Requirements: The course will be delivered virtually using Zoom. Students will require access to a computer that enables them to access Zoom.

Notional Schedule:

We have proposed below dates for these activities to occur. However, we agree these dates may move based on staff and participant availability.

Cohort 1:

- **12/13/21:** Deliver Data Visualization & Storytelling course
- **12/16/21:** Support Data Visualization & Storytelling lab

December 2021

Today < > December 2021							Month	2 week	Week	3 day	Day	See records
Sun	Mon	Tue	Wed	Thu	Fri	Sat						
28	29	30	1	2	3	4						
5	6	7	8	9	10	11						
12	13	14	15	16	17	18						
19	20	21	22	23	24	25						
26	27	28	29	30	31	1						

Cohort 2:

- **6/16/22:** Deliver Data Visualization & Storytelling course
- **6/23/22:** Support Data Visualization & Storytelling lab

June 2022

Today < > June 2022							Month	2 week	Week	3 day	Day	See records
Sun	Mon	Tue	Wed	Thu	Fri	Sat						
29	30	31	1	2	3	4						
5	6	7	8	9	10	11						
12	13	14	15	16	17	18						
19	20	21	22	23	24	25						
26	27	28	29	30	1	2						

5.2.6 Post-Training Activities

Once the courses and learning labs are completed, Sophinea will participate in the below activities. We have proposed below dates for these activities to occur. However, we agree these dates may move based on staff and participant availability.

Cohort 1:

- **1/11/22:** Attend OHR Café: Data Capstone Project Presentation
- **1/18/22:** Participate in a debrief meeting with client and data mentors
- **1/19/22 - 2/14/22:** Implement approved changes and submit revised materials for next cohort at least two weeks prior to next cohort orientation

January 2022

Today < > January 2022						
Month 2 week Week 3 day Day See records						
Sun	Mon	Tue	Wed	Thu	Fri	Sat
26	27	28	29	30	31	1
2	3	4	5	6	7	8
9	10	11 Capstone	12	13	14	15
16	17	18 Course Debrief	19 Implement Changes	20	21	22
23 Implement Changes	24	25	26	27	28	29
30 Implement Changes	31	1	2	3	4	5

February 2022

Today < > February 2022							Month	2 week	Week	3 day	Day	See records
Sun	Mon	Tue	Wed	Thu	Fri	Sat						
30	31	1	2	3	4	5	< Implement Changes >					
6	7	8	9	10	11	12	< Implement Changes >					
13	14	15	16	17	18	19	< Implement Changes >					
20	21	22	23	24	25	26						
27	28	1	2	3	4	5						

Cohort 2:

- **7/14/22:** Attend OHR Café: Data Capstone Project Presentation
- **7/21/22:** Participate in a debrief meeting with client and data mentors
- **7/22/22 - 8/14/22:** Implement approved changes and submit revised materials for next cohort at least two weeks prior to next cohort orientation

July 2022

Today < > July 2022							Month	2 week	Week	3 day	Day	See records
Sun	Mon	Tue	Wed	Thu	Fri	Sat						
26	27	28	29	30	1	2						
3	4	5	6	7	8	9						
10	11	12	13	14	15	16						
				Capstone								
17	18	19	20	21	22	23						
				Course Debrief	Implement Changes							
24	25	26	27	28	29	30						
< Implement Changes												
31	1	2	3	4	5	6						
< Implement Changes												

August 2022

Today < > August 2022							Month	2 week	Week	3 day	Day	See records
Sun	Mon	Tue	Wed	Thu	Fri	Sat						
31	1	2	3	4	5	6						
< Implement Changes												
7	8	9	10	11	12	13						
< Implement Changes												
14	15	16	17	18	19	20						
< Implement Changes												
21	22	23	24	25	26	27						
28	29	30	31	1	2	3						

5.3 Quality Assurance Plan (QASP)

Sophinea's QASP will be data-oriented and objectively measured using agreed upon methods of data collection, analysis, and processes. The QASP for the Data Bootcamp will be created in collaboration with NIH OHR and follow the below steps:

- **Step 1:** Establish a process for feedback from the project team to communicate throughout the entire process.
- **Step 2:** Determine the goals & objectives of the project--why it's needed, who will use the data, and how the data will be used.
- **Step 3:** Design an implementation strategy for your project's sampling, analytics, and data requirements—essentially, what, how, when, and where you'll be monitoring.
- **Step 4:** Submission of draft QASP for review and comment and revise as needed.
- **Step 5:** Submission of final QASP for final approval and incorporation into the contract.
- **Step 6:** Implementation and tracking

5.4 Section 508 Compliance

Pursuant to Section 508 of the Rehabilitation Act of 1973 (29 U.S.C. 794d), as amended by the Workforce Investment Act of 1998, the contractor will make sure all materials are 508 compliant.

5.5 Electronic Library

During the course of the program, Sophinea will maintain an electronic library of all training materials. Sophinea proposes the use of Microsoft OneDrive for this purpose, but will work with NIH OHR to define the best approach based on organizational requirements and restrictions.

All training materials are made available to participants and NIH OHR staff electronically except when proprietary or copyright restrictions make doing so prohibitive. All developed materials for this effort become the final property of the NIH OHR except pre-copyrighted materials.

5.6 Use of Training Materials

Except if proprietary or copyrighted, all developed materials will be the final property of the NIH.

5.7 Training Sponsorship Markings

Sophinea's staff and all products and activities related to the contract shall clearly identify the NIH/OHR as the sponsor of this program. In addition, whenever possible the text and other

materials such as handouts, presentations, slides, and other instructional material shall also be identified by the NIH and OHR logos, banners, and program title.

5.8 Course Material Availability

Sophinea will ensure learners have access to all course materials and provide copies to the client.

5.9 Training Session Delivery

Sophinea will deliver all scheduled training sessions as outlined per the OHR Data Bootcamp Solicitation 75N98021Q00038 SOW.

5.10 Communication with Client

Sophinea will communicate with the client via email about necessary logistical information.

5.11 Client Observers

Sophinea understands that up to two client staff shall be permitted to observe all program sessions. These individuals will typically be the EDB Program Manager and Training Coordinator.

5.12 Technical Monitoring

Sophinea will perform all work done under this program under the general guidance and technical monitoring of the COR. Sophinea understands the COR has final approval on all plans, materials, logistical arrangements, etc. developed under the task order.

5.13 Emergency Closure

Payment for Emergency Closure – During an emergency closure of the government and/or the National Institutes of Health (NIH) taken for the public good, the NIH will issue either written or oral orders to stop work to the contractor. The contractor shall provide the NIH Contracting Officer and COR with verifiable documentation of expenses incurred which will be reviewed for equitable adjustment in the program delivery schedule, task order price, or both.

6.0 Past Experience

6.1 Prime Citation 1: Sophinea (NIH OHR - Data Collection and Analysis)

Overview: As a teammate with ITCI, Sophinea was the Lead Developer and Trainer in the Data Collection and Analysis course.

Client: Department of Health and Human Services, National Institutes of Health (NIH)

Prime Contractor: International Training Consortium, Inc.

Prime Contract #: PO # 5833870 NIH

Contract Type: Firm Fixed Price (FFP)

Period of Performance (PoP): 10/22/2019 - 10/23/2019

Contract Ceiling: \$8,500.00

Funded Value: \$8,500.00

Government POC: Shawn Mullen, PhD

Office Phone: 301-451-9199

Cell Number: (301) 215-0516

Email Address: shawn.mullen@nih.gov

ITCI POC: Skip Pettit, President

Phone Number: (301) 928-5103

Email Address: skip@international-training.com

Project Background:

The National Institutes of Health's Office of the Director (OD), Office of Human Resources (OHR) required training for Data Collection and Analysis. Our team worked closely with Dr. Shawn Mullens at NIH OHR & members of the ITC team in tailoring a Data Collection & Analysis program specifically for the NIH HR professional. Brian Thamm was the instructor, and was the SME in federal government HR and Data Collection, Analysis & Visualization selected to train this impactful HR core competency specific program.

Solution:

Sophinea developed customized and tailored training for NIH's OD OHR staff. This included training related to data collection from surveys and analysis of collected data using Excel and Tableau as the primary analytics tools.

- **Data Collection:** Sophinea developed and delivered training that covered the various data collection methods, with a focus on data collection through surveys. The training focused on the methods available to prepare the collected data for analysis with a focus on understanding various biases in surveying and approaches to reducing bias in the dataset. Hands-on training was conducted with Microsoft Excel to reduce the manual effort of combining and cleaning datasets.

- **Data Analysis:** Sophinea developed data analysis training that focused on various approaches to analyzing data through the use of Microsoft Excel and Tableau. Training was provided on general statistical techniques that can be used to analyze data, including measures of central tendency, spread/dispersion, relative position, and relationships. Hands-on training was conducted with Microsoft Excel to teach students how to use Excel functions to reduce the time required to get to insights. Training with Tableau was also conducted with focused discussion regarding the value of visual analytics and visual analytics best practices.

Technologies:

- Tableau Desktop
- Microsoft Excel

6.2 Prime Citation 2: Sophinea (US Army - Data Collection and Analysis Training)

Overview: As a teammate with ITCI, Sophinea was the Lead Developer and Trainer in the Data Collection and Analysis course.

Client: Department of the Army, CIO/G6

Prime Contractor: International Training Consortium, Inc.

Contract #: TNG GRP (Training Group) 00016338

Contract Type: Firm Fixed Price (FFP)

Period of Performance (PoP): 3/16/2021 - 3/17/2021

Contract Ceiling: \$19,980.00

Funded Value: \$19,980.00

Government POC: Latacha Rhodes-Thomas

Office Phone: (703) 545-2281

Email Address: latacha.r.rhodesthomas.civ@mail.mil

ITCI POC: Skip Pettit, President

Phone Number: (301) 928-5103

Email Address: skip@international-training.com

Project Background:

The Department of the Army, CIO/G6 required training for Data Collection and Analysis.

Solution:

Sophinea developed customized and tailored training for the CIO G6 staff. This included training related to an overview of data and analytics and data analysis using MS Excel and SQL programming language.

- **Data Analytics Overview:** Sophinea developed and delivered training that provided an overview of data and analytics and its associated ecosystem of tools. This included a review of the history of data and analytics and how best practices and customer expectations have changed over time, as the value of data and analytics has become better recognized.
- **Data Analysis:** Sophinea developed data analysis training that focused on various approaches to analyzing data through the use of Microsoft Excel and using SQL. Training was provided on general statistical techniques that can be used to analyze data, including measures of central tendency, spread/dispersion, relative position, and relationships. Hands-on training was conducted with Microsoft Excel to teach students how to use Excel functions to reduce the time required to get to insights. Training on SQL was facilitated through the development of a custom Databricks workbook and guided instruction on how to query a data set using the SQL programming language. This included methods to join data sets and aggregate data using SQL.
- **Data Visualization:** Sophinea developed data visualization training, using Tableau. The focus of this training was to highlight the value of visual analytics and review visual analytics best practices.

6.3 Prime Citation 3: Sophinea (US Army - Tableau Training)

Overview: As a teammate with ITCI, Sophinea was the Lead Developer and Trainer in the Tableau Training course.

Client: Department of the Army, CIO/G6

Prime Contractor: International Training Consortium, Inc.

Contract #: TNG GRP (Training Group) 00015265

Contract Type: Firm Fixed Price (FFP)

Period of Performance (PoP): 5/12/2020 – 5/13/2020

Contract Ceiling: \$9,990.00

Funded Value: \$9,990.00

Government POC: Latacha Rhodes-Thomas

Office Phone: (703) 545-2281

Email Address: latacha.r.rhodesthomas.civ@mail.mil

ITCI POC: Skip Pettit, President



Phone Number: (301) 928-5103

Email Address: skip@international-training.com

Project Background: The CIO G6 required Tableau training to support mission initiatives and investments in Tableau

Solution:

Sophinea developed customized and tailored training for the CIO G6 staff. This included general training and functional training related to the use of Tableau

- **Data Visualization Best Practices:** The focus of this training was to highlight the value of visual analytics and review visual analytics best practices. This included a discussion regarding the importance of data visualization concepts and also the appropriate use of data encodings.
- **Business Intelligence Technical Training:** Sophinea developed functional data visualization training, using Tableau. This included all steps to develop dashboards in Tableau, from connecting to data sources (files and databases), to curating a data model that is optimal for Tableau, through developing worksheets, dashboards, and stories.

6.4 Subcontractor Citation 1: ITC (City of Austin, Texas)

Client: City of Austin, Texas

Prime Contractor: International Training Consortium, Inc.

Contract #: MA 5800 NA200000025

Contract Type: Firm Fixed Price (FFP)

Period of Performance (PoP): 11/2019 - Current

Contract Ceiling: \$801,000 + a potential optional 3-4 month extension \$100,000+

Funded Value: \$844,000.00

Government POC: Donna Stephans, City Director

Phone Number: (512) 212-0444

ITCI POC: Skip Pettit, President

Phone Number: (301) 928-5103

Email Address: skip@international-training.com

Project Background:

ITCI is delivering a multi-consultant team that provides a wide-range of data analysis and analytics and training support over a multi-year period of performance.

The SOW requirements include assessing the culture of the city by surveying a cross-section of the city's 18,000 employees, collecting the data, analyzing the data, making recommendations

for enhancing certain city services, designing a city-wide employee training program, and training a cadre of upwards of 60 city employees to be the future primary training provider.

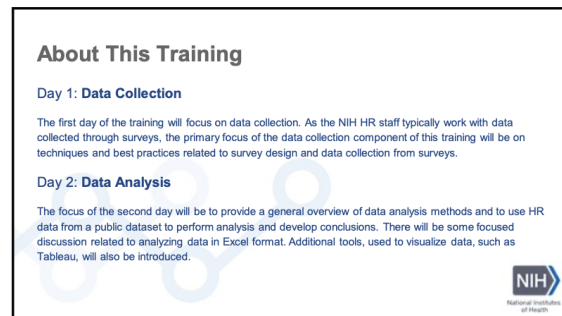
Key deliverables include: Assessing organizational culture, designing training, evaluating training materials & delivery at Kirkpatrick Level 2, collecting data, assessing data, visualizing data, and writing the Final Report.

7.0 Samples

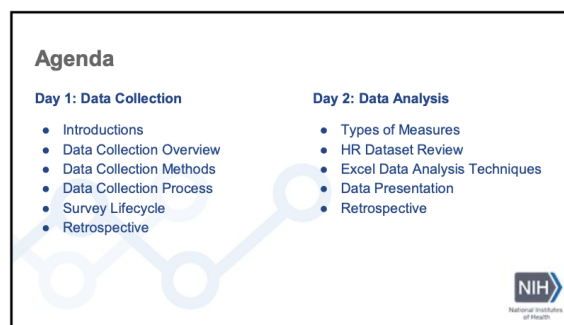
7.1 NIH Data Collection and Analysis Training



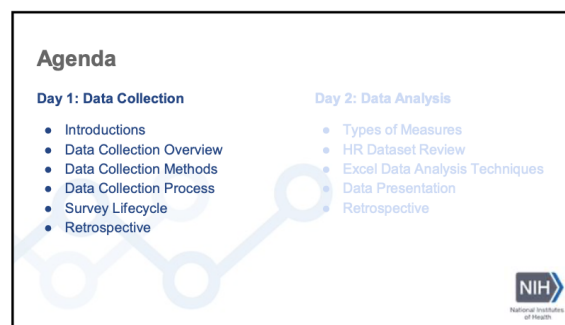
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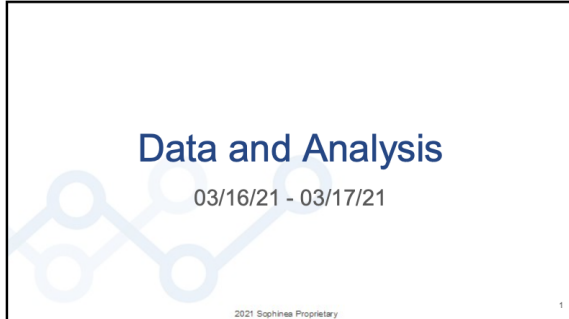
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4

- **Note:** Fully copy available upon request - too long to fit within allowable page count

7.2 Army Data and Analysis Training



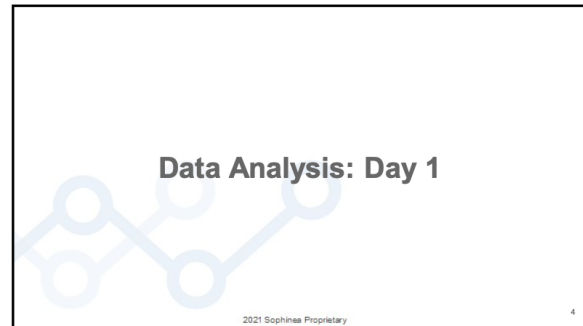
1



2



3



4

- **Note:** Fully copy available upon request - too long to fit within allowable page count

APPENDIX I: Resumes

Lead Instructor - Brian Thamm, MBA, CSM, PMP (Key Personnel)

Professional Summary

A business leader with a record of driving new business, successful program delivery and operational excellence for Fortune 200 and small businesses.

Demonstrated success with leveraging Business and Data acumen to conceptualize, design and deliver actionable and impactful data products. Some notable successes:

- Led the start-up of multiple, multi-million dollar, overseas programs.
- Led the development and execution of strategies to capture over \$40M in new business.
- Leading the development of data products that provide actionable insight across multiple business domains and groups.
- Led Executive-sponsored transformation initiatives - in the areas of process improvement and redesign.
- Experienced Data Analytics Professor

Education

Northwestern University

Master of Science, Predictive Analytics, June 2015

Villanova University

Master of Business Administration, May 2009

Virginia Commonwealth University

Bachelor of Science, Business Administration, May 2003

Relevant Experience

President/Chief Data Officer (CDO)

Sophinea Corporation, Arlington, VA, November 2018 - Present

- Leading global deployment of Tableau Server for the purpose of enterprise-level Business Intelligence (BI). This includes working with end users to define use cases for reporting; coordinating efforts with the Data Engineering team to ensure data models are properly structured; designing and deploying complex dashboards to answer questions related to the program. This platform has been used to improve

the Bureau's capacity to optimize business planning and is used to answer questions from the Executive and Legislative branches of government.

Lead Data & Analytics - Training and Consulting

International Training Consortium, Arlington, July 2019 – Present

- Led HR-focused training on Data Collection and Analysis for the Office of Human Resources (OHR) within the National Institutes of Health (NIH). This classroom training included the development and delivery of both lectures and practical hands-on exercises. The focus of the training was on best practices related to survey design to effectively capture data and using Microsoft Excel to analyze the data.
- Developed and delivered Data Visualization and Tableau training for the US Army. Training was delivered virtually and included lectures and practical hands-on exercises. The datasets aligned with common data used by the participants and instruction focused on data visualization best practices, preparing data for analysis, and using Tableau to develop dashboards for Data Storytelling.
- Developed and delivered end-to-end Data and Analytics training for the United States Army. This training was delivered virtually and included both lectures and practical hands-on exercises. Instruction covered an Introduction to Data and Analytics, Common Data Sources and Types, Data Analysis using Excel, Data Analysis using SQL on Databricks Lakehouse Platform, and visualizing data using Tableau.

Chief Technology Officer

One Federal Solution, Alexandria, VA, January 2018 – October 2018

- Deployed internal instance of Tableau Server on Google Cloud Platform (GCP). Ensured compliance with associated networking and security architectures.
- Designed and deployed an internal instance of Salesforce Sales Cloud CRM, to include consulting leadership on the design and operational implementation of workflow processes, account structures, and reporting relationships.

Manager: Analytics

CSRA, Arlington, VA, July 2016 – January 2018

- Led the global deployment of Tableau Desktop and Tableau Server. This large-scale implementation of Tableau enables analytics and serves as a single source of truth to improve the Department of State's United States Refugee Assistance Program's (USRAP) capacity to use data for program optimization and scale reporting best practices. Developed the vision and technical solution; gained executive approval; managed the fundamental change of Tableau adoption across government, project, and NGO stakeholder - & integrated data stack for program.

- Led efforts to design and implement monitoring tools to evaluate the performance and end user experience of the application. Pulled log data for a systematic view, grounded in analytics, regarding occasional and enduring performance issues. Gathered user feedback refine process and data workflows; organization of content and user roles; and planning future enhancements to information systems.
- Served as project lead for identifying and implementing process improvements using data analysis. PRM, US Digital Service,& WRAPS leadership.

Principal: Operations

CSRA, Falls Church, VA, April 2013 – July 2016

- Spearheaded adoption of process-aligned data product initiatives to improve business operations. This included the development of use cases and designing prototypes and proof of concepts to justify an ongoing investment.
- Led the initiative to deploy an internal application called "Insight" which is being used to deploy analytics dashboards to CSRA business leaders (including CSRA's C-Suite) and program managers. This custom platform was developed using Agile and involved collaboration with several stakeholder groups within the organization, such as the Chief Information Officer (CIO) organization, data owners, and the user population. Platform used JavaScript, AngularJS, and HTML; included the use of PostgreSQL for data storage and a Hortonworks Hadoop cluster for data processing; was deployed on AWS GovCloud.
- Led efforts to design and implement a monitoring tool for Insight, called New Relic. This included the use of external services integrated through the use of an API. These data provided a systematic view, grounded in analytics, regarding occasional and enduring performance issues. Gathered direct user feedback, which was used to refine process and data workflows; organization of content and user roles; and planning future enhancements to the information systems.
- Used R programming language and automated the process of data cleansing and modeling to support predictive modeling and visualizations for management. It also included the development of training materials for other prospective analysts.
- Developed data analytics strategy for program delivery & high-value use cases, evaluating data source quality and availability, and identifying analytic techniques that provide informed conclusions to stakeholders.
- Integrated analytics for decisions & data collection for further process analysis.

Certifications & Programming

Certified ScrumMaster (CSM) – February 2018

Project Management Professional (PMP) – December 2009

Databricks Developer - Essentials - April 2021

Tableau Desktop Qualified Associate – July 2017

Charles (Skip) Pettit, M.Ed. ITC (Key Personnel)

President, International Training Consortium, Inc. - Trainer, Author, & Consultant

Skip Pettit is a recognized subject matter expert in HR training and consulting at NIH.

He also brings expertise in Leadership, Unconscious Bias, EEO, Sexual Harassment Awareness & Prevention, Diversity, Equity & Inclusion (DE&I), Micro-Messaging, and Leadership & Supervision. He has trained more than 100,000 federal professionals in 30+ agencies.

At the behest of the Federal EEO Executive Leadership Counsel, he hosted three 3-day Thought Leadership Conferences bringing together thought leaders from the US government, private industry, academia, not-for-profits and elsewhere to wrestle with daunting topics, such as bullying in the workplace, veteran suicide, sexual harassment awareness and prevention, unconscious bias, and diversity and inclusion.

In 2020 & 2021 Skip and his team were awarded project work with 2 large organizations - one with 18,000 employees and the other with 350,000. In 2017, Skip Pettit and a team of 7 SMEs trained 3,000 managers and supervisors in all 50 US states and Puerto Rico. For the past 18 years ITC has provided NIH OHR with tailored training on HR Core Competencies.

ITC understands NIH OHR's culture and the OHR mission - and looks forward to building this new Data Collection & Analysis Boot Camp program.

For 29 years Skip has designed and delivered tailored training to more than 50 Public Sector clients including NIH, FDA, CDC, EPA, DOE, DOD, US Navy, DLA, DISA, Missile Defense Agency, Nuclear Regulatory Agency, National Science Foundation, NIH, HHS, SAMSA, Public Health Service, VA, VOA, DOT, DOS, DOC, DHS, and others. Training delivered includes all aspects of Leadership, Supervision, Diversity and Inclusion, Data Analysis, IT Security, Unconscious Bias, Project Management, Group Facilitation, and Building High-Performance Teams. Participants are mentored and coached in strategies for success and practical application of learning.

Chief Learning Officer

Thought Leadership Conferences (TLC)

March 2011 – Present (10 years) Washington, DC

Mr. Pettit continues as the Chief Learning Officer for Thought Leadership Conferences at select locations around the world - 3-Day off-site Think Tanks bringing thought leaders together for D&I best practices.

US Army (1970-1993). Entered military service during the Vietnam War as a Combat Medic and retired from the U.S. Army in 1993. Traveled and lived abroad including 9 years in Europe, plus military TDY assignments to Korea and Germany. Traveled to the Middle East, Africa,

Asia, Europe, Latin America, Canada, and North America. Taught at numerous US Army Leadership Academies and attended DEOMI in 1979-80 - the PREMIER federal government EEO Training Program. In 1982, he returned as Adjunct Faculty.

Graduate Degrees & Diversity Expertise. After completing Mental Health and Clinical Psychology degrees in 1974-1977 (Montgomery College and Antioch University, USA), completed 2 Masters' Degrees in *Counseling* and *Personnel Services/Rehabilitation Counseling* at the University of Maryland, College Park, MD in 1980-1982.

Cited in *Who's Who International* and the *Yearbook of Experts, Authorities, and Spokespersons*. Mr. Pettit is a nationally recognized trainer, consultant, and educator. His extensive work with the Department of Defense (DOD) and NIH, in particular, makes him a unique contributor to this effort. He is a Subject Matter Expert in HR, Personnel, Recruiting & Retention, Staff Development & Training, Project Management, Team Building, Inclusion, Diversity, Performance Management, Supervision, Communication, Workplace Bias, and Managing Conflict.

Mr. Pettit develops, coordinates, executes, and evaluates managerial training and development programs across several areas. His 25+ years' experience in managerial leadership, performance management, manager orientation, and communication skills, makes him an outstanding candidate to deliver these Data Learning Lab training.

Mr. Pettit is a noted educator who has delivered guest lectures at Johns Hopkins University, the University of Maryland, Montgomery College, Pentagon, and Gallaudet University. He is a graduate of the Defense Equal Opportunity Management Institute (DEOMI) and former 10-year adjunct faculty member.

NOTE: In 2021, Skip Pettit published his latest book on Remote Work -- ***"The Ultimate Guide To Remote Work – 900 Tips, Strategies & Best Practices."***

Dr. Lester Hoffman, PhD (Harvard University) - Consultant

Expert at Kirkpatrick Level 2 Training Evaluation, Scientific Communication Training, and Instructional Systems Design

Kirkpatrick Training Evaluation Expert

- 25+ years' experience in planning and conducting Kirkpatrick Evaluation Processes, Levels 1-4 - Designed/conducted 350 processes at all 4 levels, including over 100 Level 2 processes
- Designed more than 2,000 Mastery Test Questions (Level 2) for such clients as: USDA, VA, IBB, HHS, AT&T, Citigroup, Novartis, Merck, and others. Other Kirkpatrick Evaluation process clients include National Cancer Institute, US Navy, IBM, Lockheed-Martin, FedEx, JP Morgan/Chase
- Total number of employees Dr. Hoffman has gathered course & program evaluation data from exceeds 200,000 technical & non-technical
- Conducted 20+ Program Evaluation processes for programs with budgets ranging from \$20,000 to \$990,000 to \$6,600,000

- Taught post-graduate level workshops at the NYU Management Institute on Training Evaluation

Scientific & Technical Communication Skills Training and Evaluation of Training Programs (including NIH)

- Developed/instructed 200 workshops for scientists, researchers, and health professionals in technical communication skills (writing & presentation), writing team collaboration, presentation techniques, etc. Worked with these populations at NIH, NCI, FDA, US Navy, EPA, NOAA, VA, IBM, Novartis Pharmaceuticals, Columbia University Graduate School of Public Health
- At NIH and NCI, designed, developed, and taught scientific communication and data presentation skills to 600+ scientists and researchers At NIH and NCI, evaluated learning processes in over 30 training programs
- For Grants Administration Division of NIH, evaluated skill levels of 65 grants administrators
- For FDA (2020-2021) currently teaching programs on scientific communication skills, including conducting evaluation processes of student mastery of scientific communication and data presentation skills

Experience In Instructional Systems Design (Training Program Development)

Served as Instructional Designer and/or Developer of 300 separate Training Modules, including:

- Developing courses & interactive team exercises in such topics as Data Analysis, Leadership Skills, Project Management, Improving Customer Service Quality, Supervisory Skills, Addressing Unconscious Bias, and Problem Solving/Decision-Making
- Consulted on ISD with 18 Federal agencies & over 40 Fortune 200 companies, e.g., USDA, EPA, VA (14 years), NIH (8 years), NCI, US Navy, NOAA, Census Bureau, IBM, Lockheed-Martin, AT&T, Pfizer, Deloitte, Novartis
- Taught post-graduate level workshops at the NYU Management Institute on ISD

Biographical Information

- PhD from Harvard University - taught and did research on Instructional Design, Program Evaluation, Curriculum Development, and Cognitive Psychology
- BA (Phi Beta Kappa) from Columbia University
- Conducted research at Harvard University sponsored by National Science Foundation
- Conducted research at Brandeis University sponsored by National Science Foundation

APPENDIX II: Letters of Commitment

Skip Pettit - ITC (Key Personnel)

To whom this may concern:

This letter confirms that I have committed to supporting Sophinea's delivery of a Data Bootcamp under Solicitation 75N98021Q00038. I further confirm that I have the authority to make this commitment on behalf of ITC.

Anticipated Period of Performance:

Base Year: 9/2021 - 9/2022
Option Year 1: 9/2022 - 9/2023
Option Year 2: 9/2023 - 9/2024
Option Year 3: 9/2024 - 9/2025
Option Year 4: 9/2025 - 9/2026

Name: __Charles ("Skip") Pettit__

Signature: 

Date: __8/22/2021__

Dr. Lester Hoffman - Consultant

To whom this may concern:

This letter confirms that I have committed to supporting Sophinea's delivery of a Data Bootcamp under Solicitation 75N98021Q00038. I further confirm that I have the authority to make this commitment.

Anticipated Period of Performance:

Base Year: 9/2021 - 9/2022
Option Year 1: 9/2022 - 9/2023
Option Year 2: 9/2023 - 9/2024
Option Year 3: 9/2024 - 9/2025
Option Year 4: 9/2025 - 9/2026

Name: Lester Hoffman

Signature: *Lester Hoffman*

Date: 08 / 22 / 2021

P - ID: 202-00400000-44040004000000000000-07000-07-0000

Signed Amendment 1

AMENDMENT OF SOLICITATION/MODIFICATION OF CONTRACT				1. CONTRACT ID CODE	PAGE 1 OF 2 PAGES
2. AMENDMENT/MODIFICATION NO. 0001		3. EFFECTIVE DATE See Block 16C		4. REQUISITION/PURCHASE REQ. NO.	
6. ISSUED BY National Institutes of Health OD- Office of Logistics and Acquisitions Operations 6011 Executive Blvd. Room 529S Rockville, MD 20852-3804		7. ADMINISTERED BY (if other than item 6) National Institutes of Health OD- Office of Logistics and Acquisitions Operations 6011 Executive Blvd. Room 529S Rockville, MD 20852-3804		5. PROJECT NO. (if applicable) OD/OLAO	
8. NAME AND ADDRESS OF CONTRACTOR (No., street, county, State and ZIP Code)				9A. AMENDMENT OF SOLICITATION NO. <input checked="" type="checkbox"/> 75N98021Q00038	
				9B. DATED (SEE ITEM 11) Aug 5, 2021	
				10A. MODIFICATION OF CONTRACT/ORDER NO.	
				10B. DATED (SEE ITEM 13)	
CODE		FACILITY CODE			
11. THIS ITEM ONLY APPLIES TO AMENDMENTS OF SOLICITATIONS					
<input checked="" type="checkbox"/> The above numbered solicitation is amended as set forth in Item 14. The hour and date specified for receipt of Offers <input checked="" type="checkbox"/> is extended, <input type="checkbox"/> is not extended. Offers must acknowledge receipt of this amendment prior to the hour and date specified in the solicitation or as amended, by one of the following methods: (a) By completing items 8 and 15, and returning <u>1</u> copies of the amendment; (b) By acknowledging receipt of this amendment on each copy of the offer submitted; or (c) By separate letter or telegram which includes a reference to the solicitation and amendment numbers. FAILURE OF YOUR ACKNOWLEDGMENT TO BE RECEIVED AT THE PLACE DESIGNATED FOR THE RECEIPT OF OFFERS PRIOR TO THE HOUR AND DATE SPECIFIED MAY RESULT IN REJECTION OF YOUR OFFER. If by virtue of this amendment your desire to change an offer already submitted, such change may be made by telegram or letter, provided each telegram or letter makes reference to the solicitation and this amendment, and is received prior to the opening hour and date specified.					
12. ACCOUNTING AND APPROPRIATION DATA (if required)					
13. THIS ITEM ONLY APPLIES TO MODIFICATION OF CONTRACTS/ORDERS. IT MODIFIES THE CONTRACT/ORDER NO. AS DESCRIBED IN ITEM 14.					
CHECK ONE	A. THIS CHANGE ORDER IS ISSUED PURSUANT TO: (Specify authority) THE CHANGES SET FORTH IN ITEM 14 ARE MADE IN THE CONTRACT ORDER NO. IN ITEM 10A.				
<input type="checkbox"/>					
<input type="checkbox"/>	B. THE ABOVE NUMBERED CONTRACT/ORDER IS MODIFIED TO REFLECT THE ADMINISTRATIVE CHANGES (such as changes in paying office, appropriation date, etc.) SET FORTH IN ITEM 14, PURSUANT TO THE AUTHORITY OF FAR 43.103(b).				
<input type="checkbox"/>	C. THIS SUPPLEMENTAL AGREEMENT IS ENTERED INTO PURSUANT TO AUTHORITY OF:				
<input type="checkbox"/>	D. OTHER (Specify type of modification and authority)				
E. IMPORTANT: Contractor <input type="checkbox"/> is not, <input checked="" type="checkbox"/> is required to sign this document and return <u>1</u> copies to the issuing office.					
14. DESCRIPTION OF AMENDMENT/MODIFICATION (Organized by UCF section headings, including solicitation/contract subject matter where feasible.)					
This amendment updates the due date of the solicitation from August 19, 2021 at 3pm EST to August 23, 2021 at 3pm EST. No other changes occur as a result of this modification.					
Except as provided herein, all terms and conditions of the document referenced in item 9A or 10A, as heretofore changed, remains unchanged and in full force and effect.					
15A. NAME AND TITLE OF SIGNER (Type or print) Brian Thamm		15A. NAME AND TITLE OF CONTRACTING OFFICER (Type or print) Zedekiah J. Worsham Contracting Officer			
15B. CONTRACTOR/OFFICER  (Signature of person authorized to sign)		15C. DATE SIGNED 8/22/21		15D. UNITED STATES OF AMERICA (Signature of Contracting Officer)	
				15E. DATE SIGNED	
NSN 7540-01-152-8070 Previous edition unusable					
STANDARD FORM 30 (REV. 10-83) Prescribed by GSA FAR (48 CFR) 53.243					

INSTRUCTIONS

Instructions for items other than those that are self-explanatory, are as follows:

- (a) Item 1 (Contract ID Code). Insert the contract type identification code that appears in the title block of the contract being modified.
- (b) Item 3 (Effective date).
- (1) For a solicitation amendment, change order, or administrative change, the effective date shall be the issue date of the amendment, change order, or administrative change.
 - (2) For a supplemental agreement, the effective date shall be the date agreed to by the contracting parties.
 - (3) For a modification issued as an initial or confirming notice of termination for the convenience of the Government, the effective date and the modification number of the confirming notice shall be the same as the effective date and modification number of the initial notice.
 - (4) For a modification converting a termination for default to a termination for the convenience of the Government, the effective date shall be the same as the effective date of the termination for default.
 - (5) For a modification confirming the contracting officer's determination of the amount due in settlement of a contract termination, the effective date shall be the same as the effective date of the initial decision.
- (c) Item 6 (Issued By). Insert the name and address of the issuing office. If applicable, insert the appropriate issuing office code in the code block.
- (d) Item 8 (Name and Address of Contractor). For modifications to a contract or order, enter the contractor's name, address, and code as shown in the original contract or order, unless changed by this or a previous modification.
- (e) Item 9, (Amendment of Solicitation No. - Dated), and 10, (Modification of Contract/Order No. - Dated). Check the appropriate box and in the corresponding blanks insert the number and date of the original solicitation, contract, or order.
- (f) Item 12 (Accounting and Appropriation Data). When appropriate, indicate the impact of the modification on each affected accounting classification by inserting one of the following entries.
- (1) Accounting classification
Net increase \$ _____
 - (2) Accounting classification
Net decrease \$ _____
- NOTE: If there are changes to multiple accounting classifications that cannot be placed in block 12, insert an asterisk and the words "See continuation sheet".
- (g) Item 13. Check the appropriate box to indicate the type of modification. Insert in the corresponding blank the authority under which the modification is issued. Check whether or not contractor must sign this document. (See FAR 43.103.)
- (h) Item 14 (Description of Amendment/Modification).
- (1) Organize amendments or modifications under the appropriate Uniform Contract Format (UCF) section headings from the applicable solicitation or contract. The UCF table of contents, however, shall not be set forth in this document.
 - (2) Indicate the impact of the modification on the overall total contract price by inserting one of the following entries:
 - (i) Total contract price increased by \$ _____
 - (ii) Total contract price decreased by \$ _____
 - (iii) Total contract price unchanged.
 - (3) State reason for modification.
 - (4) When removing, reinstating, or adding funds, identify the contract items and accounting classifications.
 - (5) When the SF 30 is used to reflect a determination by the contracting officer of the amount due in settlement of a contract terminated for the convenience of the Government, the entry in Item 14 of the modification may be limited to --
 - (i) A reference to the letter determination; and
 - (ii) A statement of the net amount determined to be due in settlement of the contract.
 - (6) Include subject matter or short title of solicitation/contract where feasible.
- (i) Item 16B. The contracting officer's signature is not required on solicitation amendments. The contracting officer's signature is normally affixed last on supplemental agreements.

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