

Performance Work Statement

for

HEP/CAMP Technical Assistance Support **Tracking Number: ESEP190025AP**

AUTHORITY

This project is authorized under the Higher Education Act of 1965, Pub. L. 89-329, Title IV, Sec. 418A, as amended, 20 U.S.C. section 1070d-2.

BACKGROUND

The mission of the Office of Migrant Education (OME) is to provide excellent leadership, technical assistance and financial support to improve the educational opportunities and academic success of migrant children, youth, agricultural workers, fishers, and their families.

The Office of Migrant Education manages the High School Equivalency Program (HEP) and College Assistance Migrant Program (CAMP). OME awards HEP grants to assist eligible students earn a high school equivalency diploma. OME awards CAMP grants to assist eligible students complete their first year of post-secondary education. HEP and CAMP grants are awarded to institutions of higher education and non-profit organizations.

A core function of OME is to provide excellent technical assistance to HEP and CAMP projects. OME regularly communicates with HEP and CAMP grantees in order to ensure that their technical assistance needs are met. This Performance Work Statement (PWS) supports OME in meeting the technical assistance needs of grantees.

This fixed price contract assists OME in meeting its mission by providing OME with support for its technical assistance activities. The purpose of OME's technical assistance is to improve the implementation of HEP and CAMP grantee's approved grant applications.

SCOPE OF WORK

The contractor shall provide technical assistance to all HEP and CAMP grantees. For the duration of the performance period, the contractor shall adhere to reporting requirements, provide logistical support for an annual meeting, secure subject matter experts at the request of the Department, provide logistical support for grantee coordination activities, and provide logistical support for a technical assistance initiative.

The contractor shall be responsible for carrying out the work in this PWS. Specifically, the contractor shall provide support to OME in the following technical assistance areas:

- ensuring accountability through monitoring and reporting,
- support for the Annual Directors Meeting,
- securing Subject Matter Experts,
- logistical Support for the Coordination Work Group, and
- coordinating the Coaching Initiative.

The contractor shall support OME in the above technical assistance activities as directed by the requirements detailed in this PWS. Due dates for deliverables are provided in the Schedule of Deliverables. In this PWS, “days” means business days unless otherwise noted. The contractor shall submit all deliverables electronically to the Contracting Officer’s Representative (COR), with carbon copies sent to the Alternate Contracting Officer’s Representative (ACOR), and Contract Specialist (CS). The contractor’s primary means of communication with the COR shall be by email, unless otherwise directed by the COR.

PERIOD OF PERFORMANCE

This contract has a 12-month base period and three 12-month option periods.

REQUIREMENTS & DELIVERABLES

The contractor shall carry out the following activities:

Task 1: Monitoring and Reporting:

The contractor shall ensure compliance with applicable Federal regulations and the requirements of this PWS through the regular monitoring of all business activities associated with this contract. The contractor shall complete the following tasks to ensure the effective management of this contract.

Task 1.A(1) Kick-off Meeting:

The contractor shall plan and lead an in-person kickoff meeting with the Contracting Officer (CO), the CS, and the COR within ten (10) days of the award of the contract. The purpose of the meeting is to review the active tasks (baseline tasks and exercised optional tasks). During this meeting, the contractor shall identify each active task, present their strategy for completing that task, and request feedback. Additionally, working timelines for each task will be confirmed by the COR. The COR will provide an overview of OME’s technical assistance goals for the year and identify potential complicating issues. The contractor will have the opportunity to ask clarifying questions regarding active tasks.

Task 1.A(2) Work Breakdown Structure:

The contractor shall prepare a Microsoft Excel document which clearly identifies milestones and due dates for all baseline tasks and exercised optional tasks. The contractor shall exclude optional tasks which were not exercised from the Work Breakdown Structure document.

The contractor shall submit a draft Work Breakdown Structure at least five (5) days before the scheduled Kick-off meeting (Task 1.A(1)). The COR will provide prompt feedback. The

contractor shall provide the final Work Breakdown Structure at least one (1) day prior to the scheduled Kick-off meeting.

Task 1.A(3) Kick-off Meeting Summary:

Within three (3) days of the kick-off meeting the contractor shall submit to the COR a memorandum summarizing this meeting. At minimum, this summary shall include the names and positions of all meeting participants, a summary of all discussion points, and a list of action items. Each action item shall identify the directly responsible individual responsible for following up on the task and the proposed resolution date.

Task 1.B Monthly Progress Reports:

The contractor shall prepare monthly progress reports and submit them to the COR within the first seven (7) calendar days of each succeeding month. Monthly progress reports shall provide a summary status report on all active tasks. The monthly progress report shall be organized into the following sections:

- completed tasks,
- ongoing tasks,
- upcoming tasks, and
- attachments.

The contractor shall identify the tasks completed during that month, provide a brief summary of the work completed, any notable issues or delays, and if applicable, a copy of the final deliverable in the attachments section. Additionally, the contractor shall identify tasks which are ongoing, and provide a brief summary of any work completed during that month, and any notable issues or delays. Finally, the contractor shall identify any upcoming tasks that begin within the following month.

Task 1.C Biweekly Status Updates:

The contractor shall organize biweekly (first and third week of each month) status calls, to begin the first week after the initial kick-off meeting (Task 1.A(1)). The biweekly status call shall last no longer than thirty minutes. The contractor shall provide a biweekly call agenda to the COR one (1) day prior to the weekly status call. The purpose of the call is to provide status updates on contract activities occurring that week, and to discuss any planned activities for the next week. The contractor shall update the COR on any identified issues impacting the work described in this PWS, and solicit feedback from the COR on a plan of action for keeping all contract activities on time and on track. The contractor shall provide a memorandum to the COR within one (1) day of the biweekly status meeting. The memorandum shall include a summary of all topics and issues discussed, and provide a list of action items. Each action item shall identify the directly responsible individual responsible for following up on the task and the proposed resolution date.

Task 2: The Annual Directors Meeting (ADM)

The purpose of the HEP/CAMP Annual Directors Meeting is to provide technical assistance to all HEP and CAMP project directors. This annual meeting is held over a three day period (usually in July) at the U.S. Department of Education headquarters. Meeting attendance is approximately 150 grantee participants, 15 OME staff, and up to 10 guests or special invitees.

The New Directors Orientation (NDO) is a sub-meeting of the ADM that takes place during the ADM.

Task 2.A(1) – Annual Directors Meeting (ADM) Planning Meeting:

The purpose of the planning meeting is to review the goals and objectives of this task. The meeting will enable the contractor's staff to ask questions and to seek clarification of any potential issues related to implementation of this task. The contractor shall organize the initial planning meeting call no later than ninety (90) days prior to the first day of the ADM. The contractor shall provide a conference call line and host a planning conference call for up to twenty (20) persons. The COR shall provide the contractor with the email addresses of any OME staff or HEP/CAMP grantees that will be on the call. The contractor shall send an email calendar invitation with all necessary conference call information and materials to each meeting participant.

Task 2.A(2) – Annual Directors Meeting (ADM) Planning Meeting Summary:

The contractor shall submit a memorandum to the COR summarizing this meeting no later than three (3) days after the meeting. At minimum, this summary shall include the names and positions of all meeting participants, a summary of all discussion points, and a list of action items. Each action item shall identify the directly responsible individual responsible for following up on the task and the proposed resolution date.

Task 2.B(1) – Meeting Materials:

The contractor shall print meeting materials provided by the COR and, and stuff branded meeting folders with the meeting materials. The contractor shall ensure that all materials are delivered to the COR at least one (1) day before the opening of the on-site registration period. The contractor shall provide 150 folders. Each folder provided by the contractor shall contain:

- one (1) meeting agenda at approximately three (3) pages,
- one (1) directory of OME staff at approximately three (3) pages,
- one (1) staff biography at approximately five (5) pages,
- one (1) overall meeting evaluation form at approximately one (1) page, and
- ten (10) individual presentation evaluation forms at approximately one (1) page each.

The contractor shall print meeting materials on 8.5"x11" white paper with color ink.

OPTIONAL Task 2.B(2) – Meeting Signage:

The contractor shall print meeting signage as directed by the COR. The COR shall provide the contractor with the text for the signage. In the base year the contractor shall develop the graphic design of the sign, and send an electronic copy of the graphic design to the COR for approval no later than five (5) days before the first day of the ADM. This graphic design will be reused for any future option years where this task is exercised. The contractor shall ensure that three (3) signs are printed and delivered to the COR at least one (1) day before the beginning of the opening of the on-site registration period. The contractor shall print meeting signage on 20"x24" paper board, in color.

Task 2.C – Student Speaker Travel and Lodging Arrangements:

The contractor shall coordinate and reimburse the travel, per diem, lodging arrangements (two-nights) for program student speakers. The pricing for travel and lodging will be the total fixed

price that is negotiated for a non-local speaker (two nights). Each contract year will have two (2) student speakers for this sub-task. The contractor shall make travel reservations on behalf of the selected student speakers at least thirty (30) days prior to the beginning of the ADM. All costs associated with the travel reservations must be based on the Federal per diem rate for individual expenses and travel. The student speakers will not be provided an honorarium or speaking fee. The contractor shall contact the student speakers, and coordinate all travel logistics with the student. If directed by the COR, the contractor shall coordinate student speaker travel arrangements with the student's project director. The contractor shall reimburse non-local speakers for all reimbursable hotel, airline and ground transportation (common carrier) charges.

Task 2.D – Non-local Speaker Lodging Arrangements:

The contractor shall coordinate and reimburse the per diem and lodging arrangements (up to two-nights) for non-local speakers, which may include HEP and CAMP project directors, at least thirty (30) days prior to the beginning of the ADM. The pricing for lodging will be the total fixed price that is negotiated for a non-local speaker (up to two nights). Each contract year will have a minimum of two (2) and a maximum of eight (8) non-local speakers. The contractor shall reimburse speakers based on the Federal per diem rate for individual expenses and travel. The speakers will not be provided an honorarium or speaking fee, and will not have travel costs reimbursed. The contractor shall contact the non-local speakers, and coordinate all logistics with the non-local speaker. The contractor shall reimburse non-local speakers for all reimbursable per diem and hotel costs. The contractor shall not charge the Government for any instances of travel that are not requested by the COR.

Task 2.E – Evaluation Analysis and Report:

The contractor shall collect all meeting evaluation forms within five (5) calendar days of the end of the meeting. The contractor shall develop a report which includes a statistical analysis of participant responses for each individual session as well as the overall meeting. For the overall meeting and for each individual session, the contractor shall record all written responses within the evaluations. The contractor shall discuss their strategy for this task during the ADM kick-off meeting. The contractor shall modify their strategy based on feedback from the COR. The contractor shall submit the evaluation report no later than fifteen (15) calendar days after the end of the meeting.

OPTIONAL Task 2.F – Meeting Registration:

The contractor shall procure a 508-compliant commercial online registration system through which grantees and others can register for the meeting. After COR approval, the contractor shall provide an online registration system through which grantees and others can register for the meeting at least ninety (90) prior the start of the meeting. The online registration system shall include the tentative agenda provided by the COR and other information, as needed, to inform registrants about meeting logistics. The contractor shall keep the COR apprised of the persons and organizations that have confirmed registrations until the start of the meeting. The contractor shall inform the COR by email of the persons and organizations that have confirmed registrations on a weekly basis.

OPTIONAL Task 2.G – Meeting Supplies:

The contractor shall provide OME with meeting supplies at least three (3) calendar days prior to the first day of the ADM. The contractor shall provide OME with:

- six (6) flipcharts;
- three (3) boxes of markers, black; and
- three (3) boxes of markers, assorted colors.

OPTIONAL Task 2.H – Secure Meeting Venue:

The Contractor shall arrange and pay for a conference venue in Washington, DC for an annual technical assistance conference occurring over three full business days. The meeting venue shall be within walking distance to restaurants, since food will not be provided at the conference. Additionally, the meeting venue must be within walking distance to a WMATA Metro station. The Contractor shall conduct site visits to prospective conference venues to ensure the accessibility of meeting rooms as well as overall building access, including restroom facilities, prior to signing a contract with the conference venue for space. The conference facilities must be accessible to disabled individuals, consistent with Section 504 of the Rehabilitation Act of 1973, 29 U.S.C. 794. The COR must approve the conference location.

The Contractor shall secure one main plenary meeting room with the capacity to comfortably seat 180 attendees and approximately four (4) breakout rooms with a seating capacity of approximately forty (40) people each. The main plenary room shall be equipped with a podium, one (1) podium microphone, two (2) microphones with stands in the audience, a table to seat 5 panelists during a panel discussion, three (3) extra microphones for use during the panel discussion, one (1) LCD Projector, one (1) large screen, tables for materials, one (1) laptop and internet access. Each break out room shall be equipped with a podium, one (1) microphone, one (1) LCD Projector, one (1) large screen, tables for materials, one (1) laptop and internet access.

Preliminary suggestions for a conference site shall be submitted to the COR no later than thirty (30) days after the initial kick-off meeting (Task 1.A(1)). The Contractor shall secure the conference site no later than ninety (90) days prior to the targeted date of the meeting.

Task 3: Support for Subject Matter Experts

The purpose of a Subject Matter Expert (SME) is to provide technical assistance to grantees in key areas related to Federal grant administration, education, and migrant and seasonal farm work.

The contractor shall oversee the COR-approved SMEs in the conduct of activities such as:

- developing and delivering presentations at conferences or during webinars;
- conducting literature reviews of educational research;
- conducting telephone inquiries to fewer than nine individuals or programs;
- facilitating focus group meetings on a variety of topics;
- analyzing, synthesizing, and reporting the findings from the literature reviews, telephone inquiries and focus groups in a manner appropriate for the particular audience;
- developing research reports; and
- synthesizing and organizing research and other materials for dissemination activities.

The contractor is responsible for managing the performance of the SME. The identified SMEs must be willing to travel as necessary, and possess excellent written and verbal communication skills, and excellent team participation skills.

To request a Subject Matter Expert, the COR shall provide to the contractor a written SME work request that sets forth the schedule of deliverables for the work. The written work request will identify the maximum number of labor hours allowed for the request, and whether travel is required. All costs associated with the travel must be based on the Federal per diem rate for individual expenses and travel. The contractor may provide feedback to the COR on the number of hours required for the SME request. Once the number of maximum labor hours is agreed upon, the contractor shall reference the SME database, and submit the name and qualifications of the proposed SME to complete the activity. The COR shall reject the contractor's selection if the selection does not meet the requirements of the written work request.

For this task, the contractor may only charge the Government for SME requests, labor hours, and travel instances specifically requested by the COR through written work requests. Unused SME requests, labor hours, and travel instances may not be charged to the Government.

Task 3.A: Subject Matter Expert Identification (Base year only):

The contractor shall develop and submit a draft database of Subject Matter Experts (SME) to the COR within ten (10) days of the base year kick-off meeting (Task 1.A(1)). In the development of the SME database, the contractor shall be responsible for identifying potential SMEs, evaluating SME experience, and confirming SME availability. At a minimum, the database shall contain the following information for each SME:

- name,
- phone number,
- email address, and
- area of expertise.

The contractor shall provide a current resume for all SMEs with the submission of the final SME database. The contractor shall submit the final SME database within ten (10) days of receiving the COR's feedback on the draft SME database. At a minimum, the SMEs shall have experience in at least one of the following areas:

- expert knowledge of issues affecting migrant and seasonal farmworkers and their immediate family members,
- Federal grant administration,
- Adult Basic Education instructional best practices,
- postsecondary education support service best practices,
- student retention at the Post-secondary level,
- High School Equivalency exam testing resources,
- literacy and numeracy teaching strategies, or
- Federal grant project evaluation.

Task 3.B: Subject Matter Experts Selection Revision (Option Years only):

The contractor shall revise the SME database within three (3) weeks of the start of the new Option Year. The contractor and COR shall discuss revisions to the SME database during the Option Year Kick-off meeting (Task 1.A(1)). The contractor shall contact all SMEs on the previous year's SME database to confirm availability, and to request an updated resume. Additionally, the COR may request that the contractor expand the SME database by identifying additional SMEs with skills in specific content areas.

Task 3.C Coaching Initiative Subject Matter Experts:

Task 3.C provides the Government the right to exercise SME requests, labor hours, and SME travel specifically for the purpose of supporting the Coaching Initiative, in accordance with the fixed price set in the contract for SME requests, SME labor hours, and SME travel (price set at one or two nights).

For this task, the Government shall make a minimum of one (1) and maximum of two (2) SME requests within each contract year. The contractor shall select a SME that has significant experience in administering a Federal grant project at an Institution of Higher Education or a Non-profit organization. The contractor shall not select a current HEP or CAMP project director to serve in this role. The contractor may select one (1) SME that has experience related to both HEP and CAMP, or, with COR approval, the contractor may select two (2) SMEs (one SME for HEP and one SME for CAMP).

The Government shall exercise a minimum of fifty (50) SME labor hours and a maximum of two hundred (200) SME labor hours per contract year. For each SME request where the SME is non-local and the SME will need to travel, the contractor shall provide one (1) instance of travel, lodging, and per diem for the SME and be paid at the fixed price for a non-local speaker (up to two nights lodging) as set forth in the contract.

OPTIONAL Task 3.D: Additional Support for Subject Matter Experts:

Task 3.D provides the Government the right to exercise optional SME requests, labor hours, and SME travel in accordance with the fixed price set in the contract for SME requests, SME labor hours, and SME travel (price set at one or two nights).

For this task, the Government shall make a minimum of one (1) and a maximum of three (3) SME requests within each contract year. The Government shall exercise a minimum of thirty (30) SME labor hours and a maximum one hundred (100) SME labor hours per contract year. For each SME request where the SME is non-local and the SME will need to travel, the contractor shall provide travel, lodging, and per diem for the SME and be paid at the fixed price for a non-local speaker (up to two nights lodging) as set forth in the contract.

Task 4: Logistical Support for the Coaching Initiative

The purpose of the Coaching Initiative is to provide targeted technical assistance to project directors who have expressed or demonstrated a need for extra support. Experienced HEP/CAMP project directors with a track record of success will serve as coaches on a voluntary

basis. A coach serves as the primary point of contact for one to two project directors. As the primary point of contact, the coach will regularly check in on their assigned project directors, and will be a project director's first point of contact for any general questions.

Each coach will identify one to three topics which they feel particularly knowledgeable and experienced in. Each coach's strengths will be identified within an OME developed document that will be made available to all coaches and project directors participating in the Coaching Initiative. If a coach cannot answer a question posed by a project director, then they will review the coach's strengths document and refer the project director to another coach. This particular aspect of the Coaching Initiative is available to all project directors, not just the project directors that are assigned a coach.

A Subject Matter Expert will provide technical and logistical support for the Coaching Initiative. The SME will ensure that coaches are regularly checking in with their assigned project directors, and will occasionally follow up with project directors directly, to ensure that their technical assistance needs are being met through the Coaching Initiative. The SME may participate in technical assistance site visits for the most in need project directors.

Task 4.A(1): Initial Planning Conference Call for the Coaching Initiative:

The contractor shall organize a conference call line and host a planning conference call for up to twenty (20) persons within thirty (30) days of the Kick-off meeting (Task 1.A(1)). The COR shall provide the contractor with the email addresses of any OME staff or HEP/CAMP grantees that will be on the call. The contractor shall send an email calendar invitation with all necessary conference call information and materials to each meeting participant at least ten (10) days prior to the call.

Task 4.A(2): Initial Planning Conference Call Memorandum:

The contractor shall submit to the COR a memorandum summarizing the meeting within three (3) days of the end of the meeting. At minimum, this summary shall include the names and positions of all meeting participants, a summary of all discussion points, and a list of action items. Each action item shall identify the directly responsible individual responsible for following up on the task and the proposed resolution date.

Task 4.B Monthly Status Calls for the Coaching Initiative:

The contractor shall organize monthly status calls, to begin the first month after the initial planning call. The conference line shall accommodate up to twenty (20) callers. Participants in the call will include contractor staff, OME staff, coaches, and SMEs. The monthly status call shall last no longer than one (1) hour. The contractor shall provide a monthly call agenda to the COR one (1) day prior to the weekly status call. The purpose of the call is to provide status updates on Coaching Initiative activities occurring that month, and to discuss any planned activities for the next month. The contractor shall provide a memorandum to the COR within one (1) day of the monthly status meeting. The memorandum shall include a summary of all topics and issues discussed, and provide a list of action items. Each action item shall identify the directly responsible individual responsible for following up on the task and the proposed resolution date.

Task 4.C Coaching Initiative Site Visits:

The contractor shall provide logistical support for Coaching Initiative participant travel. The contractor shall not have any Task 4.C duties where the coach and project director coincidentally live in the same commuting area. When the coach and project director are in separate locations, the contractor will provide reimbursement for travel, lodging, and per diem for the traveling coach or project director. Per each coach/project director pair, the contractor would be required to pay for only one person, because either the coach will travel to the project director or the project director will travel to the coach.

Per contract year, there shall be a maximum of sixteen (16) instances of travel for which the contractor shall arrange travel and reimburse the traveler. Participants may travel a maximum of two (2) times per contract year. A coach may travel to a project director's worksite, and a project director may travel to a coach's worksite. There shall be a minimum of six (6) and a maximum of sixteen (16) travel instances, where each instance is only one person traveling. The price per person will be the fixed price set for a single non-local speaker (two nights) set forth in the contract. Neither the coach nor the project director will receive any honorarium.

The contractor shall contact the coach/project director to give them information on travel reimbursement policies and procedures. The contractor shall reimburse a coach or project director for all reimbursable hotel, airline and ground transportation (common carrier) charges within thirty (30) days of receiving a coach or project director's completed reimbursement request. The contractor shall not charge the Government for any instances of travel that are not requested by the COR.

OPTIONAL Task 4.D Coaching Initiative Subject Matter Expert Site Visits:

The contractor shall provide logistical support for Coaching Initiative SME travel. The contractor shall not have any Task 4.D duties where the SME and project director coincidentally live in the same commuting area. When the SME and project director are in separate locations, the contractor will provide reimbursement for travel, lodging, and per diem for the traveling

Per contract year, there shall be a maximum of four (4) instances of travel for which the contractor shall arrange travel and reimburse the traveler. A SME may travel to a project director's worksite to provide additional technical assistance and support during a coach's site visit. There shall be a minimum of zero (0) and a maximum of four (4) travel instances, where each instance is only one person traveling. The price per person will be the total fixed price set for a single non-local speaker (two nights) set forth in the contract.

The contractor shall contact the SME to give them information on travel reimbursement policies and procedures. The contractor shall reimburse the SME for all reimbursable hotel (two-nights), airline and ground transportation charges within thirty (30) days after the SME completes the travel. The contractor shall not charge the Government for any instances of travel that are not requested by the COR.

OPTIONAL Task 5: Logistical Support for the Coordination Work Group

The purpose of the Coordination Work Group (CWG) is to increase collaboration between OME and HEP/CAMP project directors, as well as to ensure that the needs and views of project directors are incorporated into OME decision making. The Coordination Work Group will consist of nine HEP and CAMP project directors who would represent all HEP and CAMP project directors in meetings with OME. Tasks 5.B and 5.D shall not both be exercised within the same contract year.

OPTIONAL Task 5.A: Initial Planning Conference Call for the Coordination Work Group:

The contractor shall provide a conference call line and host a planning conference call for up to twenty (20) persons within thirty (30) days of the Kick-off meeting (Task 1.A(1)). The COR shall provide the contractor with the email addresses of any OME staff or HEP/CAMP grantees that will be on the call. The contractor shall send out an email calendar invitation with all necessary conference call information and materials.

OPTIONAL Task 5.B Coaching Initiative Virtual Meeting Support:

The contractor shall provide support for two (2) virtual meetings for the CWG. During the meetings, the contractor shall record the minutes of the meeting, which shall last for approximately two (2) hours. Within five (5) days of the end of each meeting, the contractor shall send the COR a draft memorandum which identifies meeting participants, summarizes key topics of discussion, and identifies any post-meeting action items. The COR shall provide feedback to the contractor. The contractor shall provide the COR with the final virtual meeting memorandum within three (3) days of receiving feedback from the COR. The COR shall then make the memorandum available to all CWG participants.

OPTIONAL Task 5.C: Coordination Work Group Travel:

After receiving direction from the COR, the contractor shall coordinate and reimburse the travel, per diem, lodging arrangements (two-nights) for CWG members traveling to U.S. Department of Education Headquarters for no more than one (1) in-person meeting with OME staff. The pricing for travel and lodging will be the total fixed price that is negotiated for a non-local speaker (two nights). Each contract year will have a maximum number of nine (9) non-local speakers for this sub-task. The contractor shall make travel reservations on behalf of the CWG members. All costs associated with the travel reservations must be based on the Federal per diem rate for individual expenses and travel. The CWG members will not be provided an honorarium or speaking fee. The contractor shall contact the CWG members, and coordinate all travel logistics. The contractor shall reimburse the CWG members for all reimbursable hotel, airline and ground transportation (common carrier) charges.

OPTIONAL Task 5.D: Coordination Work Group Meeting Support:

The contractor shall provide support for one (1) in-person meetings and one (1) virtual meeting for the CWG. During the in-person meeting, the contractor shall record the minutes of the meeting, which shall last for no more than two (2) business days. During the virtual meeting, the contractor shall record the minutes of the meeting, which shall last for approximately two (2) hours. Within five (5) days of the end of each meeting, the contractor shall send the COR a draft memorandum which identifies meeting participants, summarizes key topics of discussion, and

identifies any post-meeting action items. The COR shall provide feedback to the contractor. The contractor shall provide the COR with the final meeting memorandum within three (3) days of receiving feedback from the COR. The COR shall then make the memorandum available to all CWG participants.

SCHEDULE OF DELIVERABLES

Item	Deliverable/Activity	Narrative Due Date	Calendar Due Date (to be filled in at a later date)
1.A(1)	Kick-off meeting	Within ten (10) days of the award of contract	
1.A(2)	Draft Work Breakdown Structure	No less than seven (7) calendar days prior to the scheduled Kick-off meeting	
1.A(2)	Final Work Breakdown Structure	No less than one (1) calendar day prior to the scheduled Kick-off meeting	
1.A(3)	Kick-off Meeting Summary	Within three (3) days of the Kick-off meeting	
1.B	Monthly Progress Reports	Within the first seven (7) days of each succeeding month (ongoing)	
1.C	Biweekly Status Update Calls	First and third week of each month	
1.C	biweekly call agenda	Within one (1) day prior to the weekly status call	
1.C	Call memorandum	Within one (1) day of the biweekly status meeting	
2.A(1)	ADM Planning Meeting	No later than ninety (90) days prior to the first day of the ADM	
2.A(2)	Annual Directors Meeting (ADM) Planning Meeting Summary	No later than three (3) days after the meeting	
2.B(1)	Meeting Materials	At least one (1) day before the opening of the on-site registration period	
2.B(2)	Meeting Signage Graphic (BY Only)	No later than five (5) days before the start of the meeting	

2.B(2)	Meeting Signage Printing	At least one (1) day prior to the opening of the on-site registration period	
2.C	Non-local Speaker Travel and Lodging Arrangements for Students	At least thirty (30) days prior to the beginning of the ADM	
2.D	Non-local Speaker Lodging Arrangements	At least thirty (30) days prior to the beginning of the ADM	
2.E	Collect all meeting evaluation forms	Within five (5) calendar days of the end of the ADM.	
2.E	Evaluation Analysis and Report	No later than fifteen (15) calendar days after the end of the meeting	
2.F	Meeting Registration and On-site Support	At least ninety (90) prior the start of the meeting	
2.G	Meeting Supplies	At least three (3) calendar days prior to the first day of the ADM	
2.H	Propose conference venue	Within thirty (30) day of the initial kick-off meeting	
2.H	Secure conference venue	At least ninety (90) days prior to the targeted start date for the conference	
3.A	Draft database of Subject Matter Experts	within ten (10) days of the base year kick-off meeting	
3.A	final SME database	within ten (10) days of receiving the COR's feedback	
3.B	revise the SME database	within three (3) weeks of the start of the new Option Year	
3.C	Coaching Initiative Subject Matter Experts	Ongoing	
3.D	Additional Support for Subject Matter Experts	Ongoing	
4.A(1)	Organize a conference call line	Within thirty (30) days of the start of the Kick-off meeting	
4.A(1)	Send an email calendar invitation	At least ten (10) days prior to the call	
4.A(2)	Memorandum summarizing the meeting	Within three (3) days of the end of the meeting	
4.B	Organize monthly status calls	Monthly	
4.B	monthly call agenda	One (1) day prior to the weekly status call	
4.B	memorandum	within one (1) day of the monthly status meeting	
4.C	Coaching Initiative Site Visits	Ongoing	

4.D	Coaching Initiative Subject Matter Expert Site Visits	Ongoing	
5.A	Conference call line	Within thirty (30) days of the Kick-off meeting (Task 1.A(1))	
5.B	first virtual meeting	approximately ninety (90) days prior to the Annual Directors Meeting	
5.B	second virtual meeting	approximately ninety (90) days after the Annual Directors Meeting	
5.B	draft memorandum	Within five (5) days of the end of each meeting	
5.B	final memorandum	within three (3) days of receiving feedback from the COR	
5.C	Coordination Work Group Travel	After receiving direction from the COR	
5.D	in-person meeting	approximately one hundred and twenty (120) days prior to the Annual Directors Meeting	
5.D	virtual meeting	approximately sixty (60) days after the Annual Directors Meeting	
5.D	draft memorandum	Within five (5) days of the end of each meeting	
5.D	final memorandum	within three (3) days of receiving feedback from the COR	