Tasks and Deliverables

Base Year

Task 0: Management Plan

The contractor shall develop a management plan in draft for review by and coordination with the COR. The Management Plan must outline and/or reiterate the deliverables that are necessary to meet the Government's specific requirements. Activities to complete this task include: a management plan that provides a project timeline of deliverables and expected completion dates.

Deliverable: Management Plan

Task 1: Executive Leadership Development

The purpose of this task is to provide tools and resources designed to ensure XYZ's executives are well-equipped to lead the organization and ensure mission accomplishment. For this task, the contractor shall execute XYZ's New Executive Transition (NExT) Program Plan by assessing learning needs; developing and facilitating learning events to address those needs; recommending opportunities, tools, and resources to enhance executives' learning and growth; and identifying methods to improve executive engagement in their own learning and development. The contractor will also evaluate the impact of this program to further enhance its offerings. Consequently, efforts under this task will result in XYZ executives who are able to operate more effectively within their own organizations, who are able to work towards organizational excellence, and who demonstrate enhanced people and resource management skills. Through these efforts, this task will support HRM's commitment to foster the development of its senior leaders.

Activities include the following:
- Implement XYZ's New Executive Transition (NExT) Program Plan.
    - Assess training and development needs of XYZ's executives (those who are currently executives, as well as new to the SES and/or Federal environment) and provide recommendations to address identified needs.
    - Revise existing workshop materials (content, agenda, and/or exercises, as needed) for the 3-day executive training event (held bi-annually) based on assessment results, and provide one trainer to co-facilitate the event (offsite) with an XYZ facilitator. Trainer responsibilities will include attending the 3-day event, collaborating with XYZ SMEs and stakeholders prior to the event (to gain XYZ-specific knowledge needed for an effective delivery), and working with participants during small-group exercises.
    - Design, develop, and facilitate two learning events for XYZ's senior executives, based on assessment results. Materials for each event should include content, facilitator and participant guides, XYZ-specific activities, and slides. Events should be no longer than two hours each.
    - Document and implement XYZ-developed criteria to provide executives with access to executive coaching services.
    - Create and maintain an Excel-based tracking tool that contains an updated list of XYZ executives and program-specific information (such as the status of program activities and progress towards milestones and goals) to ensure the program meets its purpose and objectives.

- o Identify best practices to increase executives' and stakeholders' awareness of the NExT Program, engagement in the program's activities, and use of its tools and resources. Provide recommendations in a strategic communication plan that is aligned with the desired outcomes of the NExT Program. Implement communications plan.
- Evaluate the NExT Program for effectiveness and impact.
  - o Analyze participant feedback after each of the 4 executive learning events above; provide a summary report of findings with recommendations for improvement after each event.
  - o Conduct an evaluation and deliver an annual evaluation report that includes findings and recommendations to enhance the program (using evaluation results, stakeholder feedback, and best practices in leadership and executive development).
- Provide monthly status reports on task activities and deliverables.

Deliverables:
- Report containing recommendations to improve executive training and development
- Revised workshop materials for XYZ's 3-day executive training event
- Content and materials for two, 2-hour learning events for XYZ's senior executives
- Document containing XYZ-developed matching criteria and process for executive coaching
- Excel-based tracking tool containing NExT Program information
- Strategic communication plan for the NExT Program
- Four summary feedback reports with recommendations
- Evaluation report with findings and recommendations for program enhancement
- Monthly status reports on task activities and deliverables

Task 2: Career Development

The purpose of this task is to provide all XYZ employees, at all levels, with career and personal development opportunities through training and development. The contractor shall develop and implement career management resources that equip XYZ staff with the information, skills, opportunities, resources, and tools they need to successfully manage their careers and support their own professional development. The contractor will also evaluate the effectiveness and impact of these resources and provide recommendations for improvement. The activities under this task will support XYZ's goal of creating a high-performing workforce.

Activities include the following:
- Execute XYZ's Learning Strategy for the general workforce.
  - o Develop a 3-year implementation plan to execute XYZ's Learning Strategy for its general workforce, which will include a detailed outline of activities required to meet the learning and development needs of and to enhance professional growth opportunities for XYZ employees.
  - o Design, develop, and facilitate two 90-minute courses on 1) understanding budget and financial management at XYZ and 2) querying, analyzing, and reporting on data from XYZ systems. Materials for each course should include content, facilitator and participant guides, XYZ-specific activities, and slides.
  - o Design, develop, and narrate one online course on interviewing skills. Material for each online course include content, scripts, B-roll material, any supporting materials for participants, XYZ-specific examples and context, as well as a list of written edits needed after initial course development. (XYZ will provide and be responsible for all programming and equipment.)

- o Create and implement a plan to deliver up to five (5) courses, using existing materials, per month. Courses should be delivered by contractor and onsite at XYZ, and courses should be on topics identified as learning needs in XYZ's Learning Strategy.
- o Create and maintain an Excel-based tracking tool that contains program-specific information (such as the status of program activities and progress towards milestones and goals) to ensure XYZ meets the objectives of its learning strategy.
- o Identify best practices to increase awareness of, engagement in, and use of the vast learning and development opportunities and resources XYZ provides its staff. Provide recommendations in a strategic communication plan that is aligned with HRM's strategic workforce development goals and the XYZ Learning Strategy. Implement communications plan.
- o Design and develop one 30-minute briefing that highlights the learning and development resources, opportunities, and tools XYZ offers its staff. Briefing, to be delivered at organizational meetings by an XYZ SME, should be informative and engaging.
- o Deliver quarterly status reports for HRM senior executives and XYZ Academy stakeholders on progress towards learning strategy accomplishments.
- Evaluate the effectiveness and impact of the learning and development offered to XYZ staff.
  - o Deliver a summary report of participant feedback, using after-event evaluations, on a quarterly basis.
  - o Conduct a comprehensive evaluation and deliver an annual evaluation report that includes findings and recommendations to enhance learning and development offerings to XYZ staff (using evaluation results, stakeholder feedback, and best practices in employee and workforce development).
- Provide monthly status reports on task activities and deliverables.

Deliverables:
- 3-year implementation plan for XYZ's Learning Strategy
- Content and materials for two 90-minute courses
- Content and materials for one online course
- Delivery plan for and facilitation of up to five (5) courses per month
- Excel-based tracking tool containing program-specific information
- Strategic communication plan
- Briefing that highlights XYZ's learning and development resources, opportunities, and tools
- Quarterly status reports for HRM senior executives and XYZ Academy stakeholders
- Quarterly summary reports of participant feedback, using after-event evaluations
- Evaluation report with findings and recommendations
- Monthly status reports on task activities and deliverables

Task 3: Program Officer Development

The purpose of this task is to provide developmental activities targeting XYZ program officers. The contractor shall develop and execute XYZ requirements to ensure those in the mission-critical occupation have the resources needed to gain the knowledge and skills to meet XYZ's strategic goals. The contractor shall also evaluate the effectiveness of these activities and provide recommendations for enhances. This task will result in the successful execution of formal program officer developmental offerings.

Activities include the following:
- Deliver revised materials for the Merit Review Basics (MRB) series (four, one-day courses on applying merit review principles at XYZ) twice per year. Revisions will be based on participant feedback and/or

policy changes, and will include modifications to course content, facilitator and participant guides, and slides.

- Facilitate monthly offerings of MRB I and MRB II, which includes collaborating with XYZ SMEs, speakers, and resource advisors who attend, lead topic-based discussions, and/or provide instruction/information during the course. Facilitate quarterly offerings of MRB III and MRB IV. MRB series will be facilitated onsite at XYZ by one contractor/facilitator.
- Provide updated materials (content, facilitator and participant guides, slides) for the two-day Program Management Seminar twice a year.
- Develop and implement a process to ensure oversight and accountability for mandatory training requirements.
- Develop material for one video-based course, based on existing course materials. Video material will include content, scripts, B-roll material, any supporting materials for participants, XYZ-specific examples and context, as well as a list of written edits needed after initial course development. (XYZ will provide and be responsible for all programming and equipment.)
- One contractor will co-facilitate the Program Management Seminar, on a quarterly basis, which includes collaborating with XYZ SMEs, speakers, and resource advisors who attend, lead topic-based discussions, and/or provide information during the course.
- Conduct participant evaluations after each session and an annual evaluation to identify best practices and determine effectiveness and impact. Provide brief reports after each event and one report on an annual basis, with findings and recommendations for improvement.
- Deliver and implement a communication plan to ensure program officers and senior leaders are aware of sessions, understand related mandatory training requirements, and are engaged as participants, stakeholders, and/or learners.
- Create and maintain an Excel-based tool that tracks information needed for reports on program officer training activity and compliance.
- Deliver a summary report of participant feedback, using after-event evaluations, on a quarterly basis.
- Conduct an annual evaluation and deliver a report that includes findings and recommendations to improve program officer training and development opportunities.
- Provide monthly status reports on task activities and deliverables.

Deliverables:
- Content and materials for the four, one-day courses in the Merit Review Basics (MRB) series
- Content and materials for the two-day Program Management Seminar
- Documentation of process for mandatory program officer training oversight and accountability
- Content and materials for one video-based course
- Delivery of up to 25 one-day MRB sessions and four, two-day Program Management Seminar sessions
- Quarterly summary evaluation reports of participant feedback
- Program evaluation report and recommendations for course enhancement
- Communication plan
- Excel-based tool that tracks program officer training activity and compliance
- Monthly status reports

Optional Task 4: Aspiring and Senior Leadership Development Programs

The purpose of this task is to execute development programs designed for high-potential employees whose career plans include moving into management and/or senior management positions. Formal

training and leadership development activities are the foundation of these programs resulting in a cohort of employees who are prepared and qualified for leadership roles in XYZ and Federal agencies. To support the execution of this opportunity for employees, the contractor will design and implement a communication plan that will engage key stakeholders and attract the interest of potential applicants. As a result, HRM will meet its target of providing leadership development opportunities to staff, as well as ensure that it engages the entire pool of potential participants.

Activities include the following:
- Develop and implement a 3-year strategic communications plan that outlines activities required to engage stakeholders (leaders, Union officials, potential applicants), uses best practice research in the area of executing leadership development programs, and includes delivery of attractive and engaging communication material.
- Conduct an evaluation of communication strategy and efforts to determine effectiveness. Provide a summary report of findings with recommendations for improvements.
- Create and maintain an Excel-based tool to track the leadership development programs' progress, alignment with OPM requirements and Federal laws, and status of program goals and objectives.
- Deliver quarterly briefings for senior leaders containing status updates on program implementation and specific actions needed to ensure program success.

Deliverables:
- Communications plan
- Evaluation report with recommendations
- Excel-based tool to track progress and alignment with laws and requirements
- Quarterly briefings containing status updates on program implementation

Optional Task 5: Training Activity Tracking and Reporting

The purpose of this task is to illustrate XYZ's compliance with mandatory training. The contractor shall work with HRM subject matter experts to identify existing XYZ training data and reporting requirements, and develop a process and tool to reliably track and report training attendance. This task will result in a more comprehensive understanding of current training activities, compliance with requirements, and an organized method of tracking and reporting these training activities to internal and external stakeholders. These activities will help meet XYZ, OPM, and other agency training requirements for federal workforce awareness, knowledge, and development.

Activities include the following:
- Develop a process and Excel-based tool to demonstrate employee training activity and compliance with mandatory training requirements.
- Identify requirements for an internal report, with a documented process for employee notification (e.g., for future mandatory training requirements). Deliver a report showing training activity and compliance with mandatory requirements for XYZ leaders.
- Identify reports required by external stakeholders on mandatory workforce training, reporting deadlines, and submission requirements. Develop reports required by two external stakeholders on mandatory workforce training by the respective deadlines and according to the respective submission requirements.

Deliverables:
- Documented process and Excel-based tool to show training activity and compliance

- Report showing training activity for XYZ leaders
- Reports for two external stakeholders on mandatory workforce training

Optional Task 6: Federal Supervision

The purpose of this task is to ensure new supervisors at XYZ understand their roles and have resources to perform their jobs effectively. To support this effort, the contractor shall work with HRM to deliver four sessions of the mandatory, 3-day Federal Supervision at XYZ course. As a result of this task, XYZ supervisors will be better equipped to manage their resources and engage in staff development.

Activities include the following:

- Deliver revised materials for the 3-day Federal Supervision at XYZ course twice per year. Revisions will be based on participant feedback and/or policy changes, and will include modifications to course content, facilitator and participant guides, and slides.
- Facilitate the 3-day course, quarterly, which involves collaborating with XYZ SMEs, speakers, and resource advisors who attend, lead topic-based discussions, and/or provide information during the course. This course will be held onsite at XYZ by one contractor/facilitator.
- Conduct participant evaluations after each course. Provide an after-event summary of participant feedback after each offering, with recommendations for course improvement.
- Deliver and implement a communication plan to ensure supervisors are aware of sessions, understand related mandatory training requirements, and are engaged as participants, stakeholders, and/or learners.
- Create and maintain an Excel-based tool that tracks information needed for reports on supervisors training activity and compliance.

Deliverables:
- Updated content and materials for the 3-day Federal Supervision at XYZ, twice per year
- Delivery of four, 3-day sessions
- Four summary reports of participant feedback with improvement recommendations
- Communication plan
- Excel-based tool that tracks supervisor training compliance

Optional Task 7: Team Alignment Program

The Team Alignment Program is a new learning and development offering to be launched by HRM to support high-functioning teams and team leaders at XYZ. The purpose of this task is to design and implement a program to build effective teams and organizational units at XYZ. The contractor shall design a team-building workshop that supports XYZ teams in addressing issues that hinder performance. The contractor shall also conduct a pilot delivery of the workshop, with an XYZ SME, to gain feedback for necessary modifications. As a result of this task, HRM will meet its goal of partnering with XYZ leaders to building a high-performing workforce.

Activities include the following:
- Design and develop one team-building workshop. Workshop materials will include content, facilitator materials, participant guides, and team-building activities.
- Co-facilitate one workshop with a XYZ SME to pilot its effectiveness. Co-facilitation will include meeting with a XYZ team leader to assess needs, developing a plan to address the needs identified, tailoring the workshop materials accordingly, and facilitating the team workshop with the XYZ SME.
- Conduct an evaluation of the workshop and deliver a summary report on participant feedback.

- Deliver a revised workshop based on feedback from the pilot session.
- Deliver a communication plan to ensure XYZ leaders are aware of this team-building service.

Deliverables:
- Content and materials for team alignment workshop
- Summary report of participant feedback after pilot session
- Revised content and materials for team alignment workshop
- Communications plan

Optional Task 8: Evaluation Activities

The purpose of this task is to evaluate HRM's learning and development initiatives and programs. The contractor shall work with HRM stakeholders to develop an evaluation framework and evaluation measures that speak to the effectiveness and impact of XYZ's learning and development activities. The contractor will also collect relevant data using agreed upon measures, and synthesize data to share findings and recommendations for XYZ's learning and development activities. This task will result in a comprehensive evaluation of the learning development offerings provided by HRM to XYZ through the continued assessment of individual program offerings, the creation of an evaluation framework (to include measures), and an evaluation report.

Activities include the following:
o Develop an evaluation plan and framework to include measures and survey and focus group protocols.
o Conduct survey, and up to 8 focus groups and 10 interviews to address gaps in existing data and assess the success of learning and development initiatives.
o Analyze evaluation data and organizational metrics (e.g., promotions, retention rates, FEVS data) to demonstrate the return on investment for learning and development initiatives and programs, in accordance with the evaluation plan.
o Collaborate with stakeholders to incorporate evaluation materials into learning and development offerings, and administer other ad-hoc evaluations, as appropriate, in support of a programmatic evaluation.

Deliverables:
- Evaluation plan, framework, measures, and protocols
- Evaluation report, synthesizing data collected, summarizing findings, and providing recommendations for enhancement of learning and development initiatives and programs

Option Year

Task 9: Executive Leadership Development

The purpose of this task is to provide tools and resources designed to ensure XYZ's executives are well-equipped to lead the organization and ensure mission accomplishment. For this task, the contractor shall execute XYZ's New Executive Transition (NExT) Program Plan by assessing learning needs; developing and facilitating learning events to address those needs; recommending opportunities, tools, and resources to

enhance executives' learning and growth; and identifying methods to improve executive engagement in their own learning and development. The contractor will also evaluate the impact of this program to further enhance its offerings. Consequently, efforts under this task will result in XYZ executives who are able to operate more effectively within their own organizations, who are able to work towards organizational excellence, and who demonstrate enhanced people and resource management skills. Through these efforts, this task will support HRM's commitment to foster the development of its senior leaders.

Activities include the following:
- Implement XYZ's New Executive Transition (NExT) Program Plan.
    o Assess training and development needs of XYZ's executives (those who are currently executives, as well as new to the SES and/or Federal environment) and provide recommendations to address identified needs.
    o Revise existing workshop materials (content, agenda, and/or exercises, as needed) for the 3-day executive training event (held bi-annually) based on assessment results, and provide one trainer to co-facilitate the event (offsite) with an XYZ facilitator. Trainer responsibilities will include attending the 3-day event, collaborating with XYZ SMEs and stakeholders prior to the event (to gain XYZ-specific knowledge needed for an effective delivery), and working with participants during small-group exercises.
    o Design, develop, and facilitate two learning events for XYZ's senior executives, based on assessment results. Materials for each event should include content, facilitator and participant guides, XYZ-specific activities, and slides. Events should be no longer than two hours each.
    o Document and implement XYZ-developed criteria to provide executives with access to executive coaching services.
    o Create and maintain an Excel-based tracking tool that contains a updated list of XYZ executives and program-specific information (such as the status of program activities and progress towards milestones and goals) to ensure the program meets its purpose and objectives.
    o Identify best practices to increase executives' and stakeholders' awareness of the NExT Program, engagement in the program's activities, and use of its tools and resources. Provide recommendations in a strategic communication plan that is aligned with the desired outcomes of the NExT Program. Implement communications plan.
- Evaluate the NExT Program for effectiveness and impact.
    o Analyze participant feedback after each of the 4 executive learning events above; provide a summary report of findings with recommendations for improvement after each event.
    o Conduct an evaluation and deliver an annual evaluation report that includes findings and recommendations to enhance the program (using evaluation results, stakeholder feedback, and best practices in leadership and executive development).
- Provide monthly status reports on task activities and deliverables.

Deliverables:
- Report containing recommendations to improve executive training and development
- Revised workshop materials for XYZ's 3-day executive training event
- Content and materials for two, 2-hour learning events for XYZ's senior executives
- Document containing XYZ-developed matching criteria and process for executive coaching
- Excel-based tracking tool containing NExT Program information
- Strategic communication plan for the NExT Program
- Four summary feedback reports with recommendations

- Evaluation report with findings and recommendations for program enhancement
- Monthly status reports on task activities and deliverables

Task 10: Career Development

The purpose of this task is to provide all XYZ employees, at all levels, with career and personal development opportunities through training and development. The contractor shall develop and implement career management resources that equip XYZ staff with the information, skills, opportunities, resources, and tools they need to successfully manage their careers and support their own professional development. The contractor will also evaluate the effectiveness and impact of these resources and provide recommendations for improvement. The activities under this task will support XYZ's goal of creating a high-performing workforce.

Activities include the following:

- Execute XYZ's Learning Strategy and General Workforce's Learning and Development Implementation Plan.
    - o Design, develop, and deliver three 90-minute courses on 1) understanding budget and financial management at XYZ and 2) analyzing and reporting on data pulled from XYZ systems data. Materials for each brownbag should include content, facilitator and participant guides, XYZ-specific activities, and slides.
    - o Design, develop, and facilitate three online courses on 1) individual development plans, 2) understanding budget and financial management at XYZ, and 3) analyzing and reporting on data pulled from XYZ systems data. Material for each online course include content, scripts, B-roll material, any supporting materials for participants, XYZ-specific examples and context, as well as any edits needed after initial development. (XYZ will provide and be responsible for all programming and equipment.)
    - o Create and implement a plan to deliver up to five (5) courses, using existing materials, per month. Courses should be delivered by contractor and onsite at XYZ.
    - o Create and maintain an Excel-based tracking tool that contains program-specific information (such as the status of program activities and progress towards milestones and goals) to ensure XYZ meets the objectives of its learning strategy.
    - o Identify best practices to increase awareness of, engagement in, and use of the vast learning and development opportunities and resources XYZ provides its staff. Provide recommendations in a strategic communication plan that is aligned with HRM's strategic workforce development goals and the XYZ Learning Strategy. Implement communications plan.
    - o Deliver a revised briefing that highlights the resources, opportunities, and tools XYZ offers its staff. Briefing, to be delivered at organizational meetings by an XYZ SME, should be informative and engaging.
    - o Deliver quarterly status reports for HRM senior executives and XYZ Academy stakeholders on progress towards learning strategy accomplishments.
- Evaluate the effectiveness and impact of the learning and development offered to XYZ staff.
    - o Deliver a summary report of participant feedback, using after-event evaluations, on a quarterly basis.
    - o Conduct a comprehensive evaluation and deliver an annual evaluation report that includes findings and recommendations to enhance learning and development offerings to XYZ staff (using evaluation results, stakeholder feedback, and best practices in employee and workforce development).

- Provide bi-weekly status reports on task activities and deliverables.

Deliverables:
- Content and materials for three 90-minute courses
- Content and materials for three online courses
- Delivery of up to five (5) courses
- Excel-based tracking tool containing program-specific information
- Strategic communication plan
- Briefing that highlights XYZ's learning and development resources, opportunities, and tools
- Quarterly status reports for HRM senior executives and XYZ Academy stakeholders
- Quarterly summary reports of participant feedback, using after-event evaluations
- Evaluation report with findings and recommendations
- Bi-weekly status reports on task activities and deliverables

Task 11: Program Officer Development

The purpose of this task is to provide developmental activities targeting XYZ program officers. The contractor shall develop and execute XYZ requirements to ensure those in the mission-critical occupation have the resources needed to gain the knowledge and skills to meet XYZ's strategic goals. The contractor shall also evaluate the effectiveness of these activities and provide recommendations for enhances. This task will result in the successful execution of formal program officer developmental offerings.

Activities include the following:
- Deliver revised materials for the Merit Review Basics (MRB) series (four, one-day courses on applying merit review principles at XYZ) twice per year. Revisions will be based on participant feedback and/or policy changes, and will include modifications to course content, facilitator and participant guides, and slides.
- Facilitate monthly offerings of MRB I and MRB II, which includes collaborating with XYZ SMEs, speakers, and resource advisors who attend, lead topic-based discussions, and/or provide instruction/information during the course. Facilitate quarterly offerings of MRB III and MRB IV. MRB series will be facilitated onsite at XYZ by one contractor/facilitator.
- Provide updated materials (content, facilitator and participant guides, slides) for the two-day Program Management Seminar twice a year.
- One contractor will co-facilitate the Program Management Seminar, on a quarterly basis, which includes collaborating with XYZ SMEs, speakers, and resource advisors who attend, lead topic-based discussions, and/or provide information during the course.
- Assess effectiveness of existing process used to ensure oversight and accountability for mandatory training requirements for program officers. Modify process based on findings.
- Develop material for one video-based course, based on existing course materials. Video material will include content, scripts, B-roll material, any supporting materials for participants, XYZ-specific examples and context, as well as a list of written edits needed after initial course development. (XYZ will provide and be responsible for all programming and equipment.)
- Conduct participant evaluations after each session and an annual evaluation to identify best practices and determine effectiveness and impact. Provide brief reports after each event and one report on an annual basis, with findings and recommendations for improvement.
- Deliver and implement a communication plan to ensure program officers and senior leaders are aware of sessions, understand related mandatory training requirements, and are engaged as participants, stakeholders, and/or learners.

- Create and maintain an Excel-based tool that tracks information needed for reports on program officer training activity and compliance.
- Deliver a summary report of participant feedback, using after-event evaluations, on a quarterly basis.
- Conduct an annual evaluation and deliver a report that includes findings and recommendations to improve program officer training and development opportunities.
- Provide monthly status reports on task activities and deliverables.

Deliverables:
- Content and materials for the four, one-day courses in the Merit Review Basics (MRB) series
- Content and materials for the two-day Program Management Seminar
- Delivery of up to 25 one-day MRB sessions and four, two-day Program Management Seminar sessions
- Documentation of revised process for mandatory training oversight and accountability
- Content and materials for one video-based course
- Quarterly summary evaluation reports of participant feedback
- Program evaluation report and recommendations for course enhancement
- Communication plan
- Excel-based tool that tracks program officer training activity and compliance
- Monthly status reports

Optional Task 12: Aspiring and Senior Leadership Development Programs

The purpose of this task is to execute development programs designed for high-potential employees whose career plans include moving into management and/or senior management positions. Formal training and leadership development activities are the foundation of these programs resulting in a cohort of employees who are prepared and qualified for leadership roles in XYZ and Federal agencies. To support the execution of this opportunity for employees, the contractor will design and implement a communication plan that will engage key stakeholders and attract the interest of potential applicants. As a result, HRM will meet its target of providing leadership development opportunities to staff, as well as ensure that it engages the entire pool of potential participants.

Activities include the following:
- Deliver a revised strategic communications plan for XYZ's leadership development programs, using evaluation findings. Execute the plan to inform stakeholders about the program's purpose and progress, engage potential applicants, and deliver attractive communications material (e.g., e-mails, flyers, posters, brochures).
- Maintain an Excel-based tool to track the leadership development programs' progress, alignment with OPM requirements and Federal laws, and status of program goals and objectives.
- Deliver quarterly briefings for senior leaders containing status updates on program implementation and specific actions needed to ensure program success.

Deliverables:
- Communications plan and materials
- Excel-based tool to track progress and alignment with laws and requirements
- Quarterly briefings containing status updates on program implementation

Optional Task 13: Training Activity Tracking and Reporting

The purpose of this task is to show XYZ's compliance with mandatory training. The contractor shall work with HRM subject matter experts to identify existing training data and reporting requirements, and develop a process and tool to reliably track and report training attendance. This task will result in a more comprehensive understanding of current training activities, compliance with requirements, and an organized method of tracking and reporting these training activities to internal and external stakeholders. These activities will help meet XYZ, OPM, and other agency training requirements for federal workforce awareness, knowledge, and development.

Activities include the following:
- Provide report for XYZ leaders showing training activity and compliance on a quarterly basis.
- Provide reports required by two external stakeholders on mandatory workforce training by the respective deadlines and according to the respective submission requirements.

Deliverables:
- Quarterly report showing training activity for XYZ leaders
- Reports for two external stakeholders on mandatory workforce training

Optional Task 14: Federal Supervision

The purpose of this task is to ensure new supervisors at XYZ understand their roles and have resources to perform their jobs effectively. To support this effort, the contractor shall work with HRM to deliver four sessions of the mandatory, 3-day *Federal Supervision at XYZ* course. As a result of this task, XYZ supervisors will be better equipped to manage their resources and engage in staff development.

Activities include the following:
- Deliver revised materials for the 3-day Federal Supervision at XYZ course twice per year. Revisions will be based on participant feedback and/or policy changes, and will include modifications to course content, facilitator and participant guides, and slides.
- Facilitate the 3-day course, quarterly, which involves collaborating with XYZ SMEs, speakers, and resource advisors who attend, lead topic-based discussions, and/or provide information during the course. This course will be facilitated onsite at XYZ by one contractor/facilitator.
- Conduct participant evaluations after each course. Provide an after-event summary of participant feedback after each offering, with recommendations for course improvement.
- Deliver and implement a communication plan to ensure supervisors are aware of sessions, understand related mandatory training requirements, and are engaged as participants, stakeholders, and/or learners.
- Create and maintain an Excel-based tool that tracks information needed for reports on supervisors training activity and compliance.

Deliverables:
- Updated content and materials for the 3-day Federal Supervision at XYZ, twice per year
- Delivery of four, 3-day sessions
- Four summary reports of participant feedback with improvement recommendations
- Communication plan
- Excel-based tool that tracks supervisor training compliance

Optional Task 15: Team Alignment Program

The purpose of this task is to support XYZ teams and team leaders in building effective units that support mission accomplishment at XYZ. The contractor shall work with HRM to provide a team-building workshop that supports XYZ teams in addressing issues that hinder performance. As a result of this task, HRM will meet its goal of partnering with XYZ leaders to building a high-performing workforce.

Activities include the following:
- Co-facilitate one team-alignment workshop with a XYZ SME, on a quarterly basis. Co-facilitation will include meeting with a XYZ team leader to assess needs, developing a plan to address the needs identified, tailoring the workshop materials accordingly, and facilitating the team workshop with the XYZ SME.
- Conduct an after-event evaluation after each and deliver a summary report on participant feedback.
- Deliver written communications to inform XYZ team leaders about this service, encourage them to participate, and share best practices on ongoing team-building efforts, on a monthly basis.

Deliverables:
- Delivery of four team alignment workshops
- Tailored content and materials for four team alignment workshops
- Four summary reports of participant feedback
- Monthly communications on team building opportunities and best practice research for XYZ leaders

Optional Task 16: Evaluation Activities

The purpose of this task is to evaluate HRM's learning and development initiatives and programs. The contractor shall work with HRM stakeholders to develop an evaluation framework and evaluation measures that speak to the effectiveness and impact of XYZ's learning and development activities. The contractor will also collect relevant data using agreed upon measures, and synthesize data to share findings and recommendations for XYZ's learning and development activities. This task will result in a comprehensive evaluation of the learning development offerings provided by HRM to XYZ through the continued assessment of individual program offerings, the creation of an evaluation framework (to include measures), and an evaluation report.

Activities include the following:
- Develop an evaluation plan and framework to include measures and survey and focus group protocols.
- Conduct survey, and up to 8 focus groups and 10 interviews to address gaps in existing data and assess the success of learning and development initiatives.
- Analyze evaluation data and organizational metrics (e.g., promotions, retention rates, FEVS data) to demonstrate the return on investment for learning and development initiatives and programs, in accordance with the evaluation plan.
- Collaborate with stakeholders to incorporate evaluation materials into learning and development offerings, and administer other ad-hoc evaluations, as appropriate, in support of a programmatic evaluation.

Deliverables:
- Evaluation plan, framework, measures, and protocols
- Evaluation report, synthesizing data collected, summarizing findings, and providing recommendations for enhancement of learning and development initiatives and programs

Performance Objectives

Task(s)	Objective	Criteria
	For the given task(s), what is the goal aimed to be accomplished?	How will Contractor success be measured? What is considered an acceptable level?
Task 1 Executive Leadership Development	Support XYZ in developing its new and existing executives and supporting their transition into the Foundation.	Programmatic management and support for executive development activities will reflect in-depth program knowledge and include strategic enhancements grounded in performance data. Building upon existing developmental activities, new developmental programs will be responsive to and reflective of the Foundation's emerging needs and reflect best practices in learning and development, human capital and management, and XYZ's strategic goals
Task 2 Career Development	Support XYZ in developing its workforce across all levels of the organization - including leadership, program staff and administrative professionals- to effectively meet the career development needs of a diverse and rotational workforce.	Programmatic management and support for existing workforce and leadership development activities will reflect in-depth program knowledge and include strategic enhancements grounded in performance data. Building upon existing developmental activities, new developmental programs will be responsive to and reflective of the Foundation's emerging needs and reflect best practices in learning and development, human capital and management, and XYZ's strategic goals
Task 3 Program Officer Development	Support XYZ in developing Program Officers to effectively meet the needs of this mission critical position.	Programmatic management and support for Program Officer development activities will reflect in-depth program knowledge and include strategic enhancements grounded in performance data. Building upon existing developmental activities, new developmental programs will be responsive to and reflective of the Foundation's emerging needs and reflect

Task(s)	Objective	Criteria
		best practices in learning and development, human capital and management, and XYZ's strategic goals
Optional Task 4 Aspiring and Senior Leadership Development Programs	Support XYZ in developing its aspiring and senior leaders through the successful launch of the Aspiring and Senior Leadership Development Programs.	Programmatic management and support for leadership development activities will reflect in-depth program knowledge and include strategic enhancements grounded in performance data. Building upon existing developmental activities, new developmental programs will be responsive to and reflective of the Foundation's emerging needs and reflect best practices in learning and development, human capital and management, and XYZ's strategic goals
Optional Task 5 Training Activity Tracking and Reporting	Support XYZ in identifying workforce training activities, integrating all training into an Excel-based database for ease in reporting, and understanding and responding to internal and external requests for training information in an efficient and effective manner.	Excel-based database will be reflective of HRM's requirements, to integrate and include data from multiple sources on workforce training activities and requirements. Reports for internal HRM audiences will be accurate and tailored to the needs of the intended audience; reporting requirements for external stakeholders will reflect current knowledge of best practices and mandatory federal training requirements.
Optional Task 6 Federal Supervision	Support XYZ in developing supervisors through the successful administration of the Federal Supervision sessions.	Programmatic management and support for supervisor development activities will reflect in-depth program knowledge and include strategic enhancements grounded in performance data. Building upon existing developmental activities, new developmental programs will be responsive to and reflective of the Foundation's emerging needs and reflect best practices in learning and development, human capital and management, and XYZ's strategic goals
Optional Task 7 Team Alignment Program	Support XYZ in developing successful teams and team leaders through the launch and implementation of the Team Alignment Program.	Programmatic management and support for team alignment activities will reflect in-depth program knowledge and include strategic enhancements grounded in performance data. Building upon existing activities, new service offerings will be responsive to and reflective of the Foundation's emerging needs and reflect

Task(s)	Objective	Criteria
		best practices in learning and development, human capital and management, and XYZ's strategic goals
Optional Task 8 Evaluation Activities	Support HRM in measuring and articulating the effectiveness and return on investment of learning and development programs and activities.	Evaluation report will accurately reflect the current state of HRM's learning and development initiatives and programs, participant awareness, learning, and impact, and provide recommendations for enhancements that are responsive to and reflective of the Foundation's emerging needs and reflect best practices in learning and development, human capital and management, and XYZ's strategic goals
Task 9 Executive Leadership Development	Support XYZ in developing its new and existing executives and supporting their transition into the Foundation for an additional year.	Programmatic management and support for executive development activities will reflect in-depth program knowledge and include strategic enhancements grounded in performance data. Building upon existing developmental activities, new developmental programs will be responsive to and reflective of the Foundation's emerging needs and reflect best practices in learning and development, human capital and management, and XYZ's strategic goals
Task 10 Career Development	Support XYZ in developing its workforce across all levels of the organization - including leadership, program staff and administrative professionals- to effectively meet the career development needs of a diverse and rotational workforce for an additional year.	Programmatic management and support for existing workforce and leadership development activities will reflect in-depth program knowledge and include strategic enhancements grounded in performance data. Building upon existing developmental activities, new developmental programs will be responsive to and reflective of the Foundation's emerging needs and reflect best practices in learning and development, human capital and management, and XYZ's strategic goals
Task 11 Program Officer Development	Support XYZ in developing Program Officers to effectively meet the needs of this mission critical position for an additional year.	Programmatic management and support for Program Officer development activities will reflect in-depth program knowledge and include strategic enhancements grounded in performance data. Building upon existing developmental activities, new

Task(s)	Objective	Criteria
		developmental programs will be responsive to and reflective of the Foundation's emerging needs and reflect best practices in learning and development, human capital and management, and XYZ's strategic goals
Optional Task 12 Aspiring and Senior Leadership Development Programs	Support XYZ in developing its aspiring and senior leaders through the successful launch of the Aspiring and Senior Leadership Development Programs for an additional year.	Programmatic management and support for leadership development activities will reflect in-depth program knowledge and include strategic enhancements grounded in performance data. Building upon existing developmental activities, new developmental programs will be responsive to and reflective of the Foundation's emerging needs and reflect best practices in learning and development, human capital and management, and XYZ's strategic goals
Optional Task 13 Training Activity Tracking and Reporting	Support XYZ in identifying workforce training activities, integrating all training into an Excel-based database for ease in reporting, and understanding and responding to internal and external requests for training information in an efficient and effective manner for an additional year.	Excel-based database will be reflective of HRM's requirements, to integrate and include data from multiple sources on workforce training activities and requirements. Reports for internal HRM audiences will be accurate and tailored to the needs of the intended audience; reporting requirements for external stakeholders will reflect current knowledge of best practices and mandatory federal training requirements.
Optional Task 14 Federal Supervision	Support XYZ in developing supervisors through the successful administration of the Federal Supervision sessions for an additional year.	Programmatic management and support for supervisor development activities will reflect in-depth program knowledge and include strategic enhancements grounded in performance data. Building upon existing developmental activities, new developmental programs will be responsive to and reflective of the Foundation's emerging needs and reflect best practices in learning and development, human capital and management, and XYZ's strategic goals
Optional Task 15 Team Alignment Program	Support XYZ in developing successful teams and team leaders through the launch and implementation of the Team Alignment Program for an additional year.	Programmatic management and support for team alignment activities will reflect in-depth program knowledge and include strategic enhancements grounded in performance data. Building upon existing

Task(s)	Objective	Criteria
		activities, new service offerings will be responsive to and reflective of the Foundation's emerging needs and reflect best practices in learning and development, human capital and management, and XYZ's strategic goals
Optional Task 16 Evaluation Activities	Support HRM in measuring and articulating the effectiveness and return on investment of learning and development programs and activities for an additional year.	Evaluation report will accurately reflect the current state of HRM's learning and development initiatives and programs, participant awareness, learning, and impact, and provide recommendations for enhancements that are responsive to and reflective of the Foundation's emerging needs and reflect best practices in learning and development, human capital and management, and XYZ's strategic goals