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Description of document: Defense Finance and Accounting Service (DFAS)  
organizational assessment conducted by Booz Allen  
Hamilton under the contract HQ042308A0001, 2007-2019

Requested date: 2019

Release date: 18-July-2019

Posted date: 07-October-2019

Source of document: Defense Finance and Accounting Service  
Corporate Communications  
FOIA/PA Adherence Division  
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Indianapolis, IN 46249-0150  
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## DEFENSE FINANCE AND ACCOUNTING SERVICE

8899 EAST 56<sup>TH</sup> STREET  
INDIANAPOLIS, IN 46249-0201

July 18, 2019

This is in response to a Freedom of Information Act request we received from you requesting of a copy the organizational assessment conducted by Booz Allen Hamilton under the contract HQ042308A0001. Your request was given the control number 19-HQ-0505. Please refer to this number when inquiring about your request.


The enclosed documents that originated with our agency, responsive to your request, is part of a system of records exempt from the disclosure provisions of the Freedom of Information Act (FOIA). Personal information such as names social security numbers has been withheld. Removal of this information constitutes a partial denial pursuant to Title 5 U.S.C. §552, Exemption (b) (6) of the FOIA, because release could violate the personal privacy of individual's mentioned in the documents.

Because your request has been denied in part, you are advised of your right to appeal this determination in writing to the agency appellate authority, Director, Corporate Communications. Please send any appeal to DFAS-ZCF/IN, 8899 E. 56th Street, Indianapolis, IN 46249-0150.

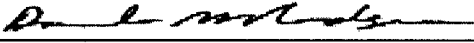
Your appeal must be postmarked within 90 calendar days from the date of this letter to be considered. A statement as to why your appeal should be granted should be included and an enclosed copy of this letter should be attached. Both the appeal letter and the envelope should bear the notation, "Freedom of Information Act Appeal."

Any questions concerning this matter should be directed to me at the following number as I am the official responsible for the denial of your request, 317-212-4591.

Sincerely,

  
Gregory L. Outlaw  
FOIA/PA Program Manager  
Corporate Communications

Enclosure: Requested Documents

AMENDMENT OF SOLICITATION/MODIFICATION OF CONTRACT				1. CONTRACT ID CODE		PAGE OF PAGES	
				1		2	
2. AMENDMENT/MODIFICATION NO.		3. EFFECTIVE DATE		4. REQUISITION/PURCHASE REQ. NO.		5. PROJECT NO. (If applicable)	
P00001		01-Mar-2009					
6. ISSUED BY		CODE		7. ADMINISTERED BY (If other than item 6)		CODE	
DEFENSE FINANCE AND ACCOUNTING SERVICE CONTRACT SERVICES DIRECTORATE BLDG 21/ 2B218 3990 EAST BROAD STREET COLUMBUS OH 43213-1152		HQ0423		See Item 6			
8. NAME AND ADDRESS OF CONTRACTOR (No., Street, County, State and Zip Code)						9A. AMENDMENT OF SOLICITATION NO.	
BOOZ ALLEN AND HAMILTON 8283 GREENSBORO DRIVE MCCLEAN VA 22102							
						9B. DATED (SEE ITEM 11)	
						X 10A. MOD. OF CONTRACT/ORDER NO. HQ0423-08-A-0001	
						X 10B. DATED (SEE ITEM 13) 30-Oct-2007	
CODE 17038		FACILITY CODE					
11. THIS ITEM ONLY APPLIES TO AMENDMENTS OF SOLICITATIONS							
<input type="checkbox"/> The above numbered solicitation is amended as set forth in Item 14. The hour and date specified for receipt of offer <input type="checkbox"/> is extended, <input type="checkbox"/> is not extended.							
Offer 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 _____ 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 you 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 APPLIES ONLY TO MODIFICATIONS OF CONTRACT/ORDERS. IT MODIFIES THE CONTRACT/ORDER NO. AS DESCRIBED IN ITEM 14.							
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.							
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).							
X C. THIS SUPPLEMENTAL AGREEMENT IS ENTERED INTO PURSUANT TO AUTHORITY OF: FAR 52.212-4(c) - Contract Terms and Conditions (Commercial Items) Changes							
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.) Modification Control Number: varthur09366 Reference BPA Master Agreement Page 2 of 19, Section B-Supplies or Services and Prices, "BPA Master Dollar Limit: delete \$20,000,000.00 without substitution. "BPA Call Limit: delete \$3,000,000.00 and substitute \$40,000,000.00.  Reference BPA Master Agreement, Page 13 of 19, Section H-Item 3, BPA Term: Delete the last sentence "The BPA ceiling is \$40,000,000.00" in its entirety without substitution. The reference to \$40,000,000.00 was intended to be a high estimate of the total value of BPA Calls to be issued. Since this is an estimate, the total value of orders issued under the BPA may exceed this total as long as they are within scope and issued during the term of the agreement.							
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)				16A. NAME AND TITLE OF CONTRACTING OFFICER (Type or print)			
				DANIEL M RODGERS / CONTRACT SPECIALIST TEL: 614-693-0115 EMAIL: Daniel.Rodgers@dfas.mil			
15B. CONTRACTOR/OFFEROR		15C. DATE SIGNED		16B. UNITED STATES OF AMERICA		16C. DATE SIGNED	
(Signature of person authorized to sign)				BY  (Signature of Contracting Officer)		02-Mar-2009	

**SECTION SF 30 BLOCK 14 CONTINUATION PAGE**

**SUMMARY OF CHANGES**

**SECTION A - SOLICITATION/CONTRACT FORM**

The overall BPA limit has been deleted.

The limit per BPA call has increased by \$10,000,000.00 from \$30,000,000.00 to \$40,000,000.00.

<b>ORDER FOR SUPPLIES OR SERVICES</b>										PAGE 1 OF 19			
1. CONTRACT/PURCH. ORDER/ AGREEMENT NO. HQ0423-08-A-0001			2. DELIVERY ORDER/ CALL NO.		3. DATE OF ORDER/CALL 2007 Oct 30		4. REQ./ PURCH. REQUEST NO.			5. PRIORITY			
6. ISSUED BY DEFENSE FINANCE AND ACCOUNTING SERVICE CONTRACT SERVICES DIRECTORATE BLDG 21/ 2B218 3990 EAST BROAD STREET COLUMBUS OH 43213-1152			CODE HQ0423		7. ADMINISTERED BY  <b>SEE ITEM 6</b>			CODE		8. DELIVERY FOB <input type="checkbox"/> DEST <input checked="" type="checkbox"/> OTHER  (See Schedule if other)			
9. CONTRACTOR BOOZ ALLEN AND HAMILTON 8283 GREENSBORO DRIVE MCCLEAN VA 22102			CODE 17038		FACILITY		10. DELIVER TO FOB POINT BY (Date) <b>SEE SCHEDULE</b>			11. MARK IF BUSINESS IS <input type="checkbox"/> SMALL <input type="checkbox"/> SMALL DISADVANTAGED <input type="checkbox"/> WOMEN-OWNED			
							12. DISCOUNT TERMS Net 30 Days			13. MAIL INVOICES TO THE ADDRESS IN BLOCK See Item 15			
14. SHIP TO  <b>SEE SCHEDULE</b>			CODE		15. PAYMENT WILL BE MADE BY DEFENSE FINANCE AND ACCOUNTING SERVICE ATTN INVP DAFS 8899 EAST 56TH STREET INDIANAPOLIS IN 46249-1510			CODE HQ0347		MARK ALL PACKAGES AND PAPERS WITH IDENTIFICATION NUMBERS IN BLOCKS 1 AND 2.			
16. TYPE OF ORDER		DELIVERY/ CALL		This delivery order/call is issued on another Govt. agency or in accordance with and subject to terms and conditions of above numbered contract.									
		PURCHASE		Reference your quote dated Furnish the following on terms specified herein. REF:									
ACCEPTANCE. THE CONTRACTOR HEREBY ACCEPTS THE OFFER REPRESENTED BY THE NUMBERED PURCHASE ORDER AS IT MAY PREVIOUSLY HAVE BEEN OR IS NOW MODIFIED, SUBJECT TO ALL OF THE TERMS AND CONDITIONS SET FORTH, AND AGREES TO PERFORM THE SAME.													
NAME OF CONTRACTOR				SIGNATURE				TYPED NAME AND TITLE				DATE SIGNED (YYYYMMDD)	
<input checked="" type="checkbox"/> If this box is marked, supplier must sign Acceptance and return the following number of copies: 1													
17. ACCOUNTING AND APPROPRIATION DATA/ LOCAL USE													
18. ITEM NO.		19. SCHEDULE OF SUPPLIES/ SERVICES				20. QUANTITY ORDERED/ ACCEPTED*		21. UNIT	22. UNIT PRICE		23. AMOUNT		
		<b>SEE SCHEDULE</b>											
* If quantity accepted by the Government is same as quantity ordered, indicate by X. If different, enter actual quantity accepted below quantity ordered and encircle.						24. UNITED STATES OF AMERICA TEL: 614-693-0115 EMAIL: Daniel.Rodgers@dfas.mil BY: DANIEL M. RODGERS			25. TOTAL				
26. QUANTITY IN COLUMN 20 HAS BEEN <input type="checkbox"/> INSPECTED <input type="checkbox"/> RECEIVED <input type="checkbox"/> ACCEPTED, AND CONFORMS TO THE CONTRACT EXCEPT AS NOTED						27. SHIP NO.			28. DO VOUCHER NO.		29. DIFFERENCES		
DATE SIGNATURE OF AUTHORIZED GOVT. REP.						<input type="checkbox"/> PARTIAL <input type="checkbox"/> FINAL			32. PAID BY		30. INITIALS		
36. I certify this account is correct and proper for payment.						31. PAYMENT <input type="checkbox"/> COMPLETE <input type="checkbox"/> PARTIAL <input type="checkbox"/> FINAL					33. AMOUNT VERIFIED CORRECT FOR		
DATE SIGNATURE AND TITLE OF CERTIFYING OFFICER											34. CHECK NUMBER		
											35. BILL OF LADING NO.		
37. RECEIVED AT		38. RECEIVED BY		39. DATE RECEIVED (YYYYMMDD)		40. TOTAL CONTAINERS		41. S/R ACCOUNT NO.		42. S/R VOUCHER NO.			

**Section B - Supplies or Services and Prices**

BPA Master Dollar Limit: \$40,000,000.00

BPA Call Limit: \$30,000,000.00

Period of Performance: 30-Oct-2007 to 29-Oct-2012

FSC Codes:

R710

## Section C - Descriptions and Specifications

GROUP ONE**Statement of Work****DFAS TRANSFORMATION SOLUTIONS I****GROUP ONE****PROGRAM MANAGEMENT, ACCOUNTING, CONSULTING AND TRAINING SERVICES****1.0 Objective:**

To provide the Defense Finance and Accounting Service (DFAS) with services to support the DFAS mission, ongoing activities, and new initiatives as a result of, or directly related to the agency's Transformation mission. The contractor shall provide the services described in this statement of work required to meet the objectives of DFAS as directed in each BPA Call.

**2.0 Requirements:**

The contractor will provide services to DFAS under one or more of the following GSA Federal Supply Schedule (FSS) Categories and SINS:

**Schedule MOBIS Mission Oriented Business Integrated Services**

SINS: 874 1: Consulting Services  
 874 4: Training Services  
 874 5: Support Products  
 874 7: Program Integration and Project Management Services

**Schedule 520 Financial and Business Solutions**

SINS: 520 11: Accounting  
 520 12: Budgeting  
 520 13: Complementary Financial Management Services  
 520 14: Audit and Financial Training Services  
 520 7: Financial and Performance Audits  
 520 9: Recovery Audits

**Schedule PES Professional Engineering Services**

SINS: 871 1: Strategic Planning for Technology Programs/Activities  
 871 2: Concept Development and Requirements Analysis  
 871 3: System Design, Engineering and Integration  
 871 4: Test and Evaluation  
 871 5: Integrated Logistics Support  
 871 6: Acquisition and Life Cycle Management  
 871 1: Schedule Brochure

**3.0 Tasks:**

Tasks required to be performed under this BPA will include those described herein. Specific task requirements and deliverables will be described in the BPA Call and specifically priced prior to the issuance of the Call. Services anticipated are:

		<b>Types of Work envisioned under the BPA – Program Management, Consulting, Training Support, Accountants</b>
<b>3.1</b>	<b>Consultant</b>	Participate in meetings and other forums to provide assistance in planning and development of work products.
<b>3.2</b>		Prepare implementation plans for identified improvements for training, metrics, monitoring and control for business processes.
<b>3.3</b>		Prepare, deliver, and maintain work products based on PMBOK standards, DFAS instructions and other tools identified by the work group.
<b>3.4</b>		Prepare meeting notes, summaries, reports and other information requested by the PMO during participation in meetings and other forums.
<b>3.5</b>		Provide analytical skills/tools, advice and recommendations on best business practices, methodologies and other tools to help the PMO in the identification of sources of data.
<b>3.6</b>		Prepare documentation in support of a single end-to-end reporting process flow document.
<b>3.7</b>		Participate and assist in the development of cost estimation/cost methodology. Provide advice and recommendations on best business practices, methodologies, and standards to determine cost estimation/cost methodology.
<b>3.8</b>		Review audit findings and recommendations and perform the following: <ul style="list-style-type: none"> <li>• Summarize key issues</li> <li>• Track the status of corrective actions and ongoing initiatives that arise from audits, reviews and self-identified improvements</li> <li>• Participate in communications with management and audit entities</li> <li>• Support populating the database to capture issues and actions</li> <li>• Support weekly reporting process</li> </ul>
<b>3.9</b>		Provide advice and recommendations on best business practices, methodologies and other tools to help DFAS in re-engineering the process.
<b>3.10</b>		Develop training program(s) for target audiences identified by DFAS. Training could include both automated and manual processes identified in “as is” or “to be” models.
<b>3.11</b>		Review DoD regulatory requirements to provide input/advice/recommendations to DFAS on development of processes or resolution of issues.



		<b>Types of Work envisioned under the BPA – Program Management, Consulting, Training Support, Accountants</b>
<b>3.12</b>		Provide advice and recommendations in the identification of the requirements for report to reconcile budget execution with cost
<b>3.13</b>		<p>Develop user requirements documentation for:</p> <ul style="list-style-type: none"> <li>• Comptroller</li> <li>• DFAS</li> <li>• OUSD(C) P/B</li> <li>• Components</li> <li>• DoD External customers/stakeholders including Congress &amp; GAO</li> </ul> <p>Use templates, formats, instructions, tools and other guidance provided by the PMO to document the process.</p>
<b>3.14</b>		Develop documentation for the “As Is” processes. Use templates, formats, instructions, tools and other guidance to document the process, identify reporting gaps, and recommend corrective actions
<b>3.15</b>		Develop user requirements documentation.
<b>3.16</b>		Develop and maintain a prioritized list of recommendations of improvements. Participate and assist in the identification of the improvement strategies. Provide advice and recommendations on best business practices, methodologies, measures and other tools to help DFAS in developing an improved process.
<b>3.17</b>		<p>Provide advice, recommendations, and assistance on best business practices, methodologies, and Business Intelligence tools to meet capabilities and customer requirements in the following areas:</p> <ul style="list-style-type: none"> <li>• Developing reports</li> <li>• Documenting requirements</li> <li>• Defining the frequency of reporting data</li> <li>• Determining the timeliness of reporting data</li> <li>• Defining the content delivery and data retention requirements of reporting data</li> </ul> <p>Determining improvements to access detailed information rapidly</p>
<b>3.18</b>		Assessing the current status and needs of the identified location and/or business area.
<b>3.19</b>		Assist in assessing, correcting, and reporting on internal control in accordance with OMB circular A-123.
<b>3.20</b>		Assist in the integration of business activity modeling and reporting for management internal controls

		<b>Types of Work envisioned under the BPA – Program Management, Consulting, Training Support, Accountants</b>
3.21		Conducting data collection and requirements analysis.
3.22		Identifying the target state operational environment.
3.23		Perform activity based costing studies
3.24		Creating detailed project management plans.
3.25	<b>Accountant</b>	The contractor shall research, analyze and prepare financial reports to support the Reports and Analysis Division and a clean financial opinion.
3.26		The contractor shall research, analyze and prepare accounting requirements, reports, and general ledger extracts to support the General Ledger Division and a clean financial opinion.
3.27		The contractor shall research, analyze and prepare audited financial statements and associated data to support the Audited Financial Statements Division and a clean financial opinion.
3.28		Contractor shall provide research and reconciliation support services to deliver financial reports in accordance with established schedules.
3.29	<b>Training</b>	The contractor shall apply adult learning principles throughout course instruction. Contractor shall thoroughly prepare and understand the stated course learning objectives prior to instructing. Contract instructors shall communicate the stated learning objectives to the students within the scheduled class hours. The contractor shall discuss the enabling learning objectives for each unit of instruction and answer student questions pertaining to those objectives. Contractor instructors shall be subject matter experts. Contractor shall use mobile training teams to provide training at locations specified and shall deliver training for DFAS employees.
3.30	<b>Program Management</b>	Develop and maintain a Project Charter that includes, but not limited to, Project Purpose, Project Scope, Project Objectives, Roles and Responsibilities, Project Approach, Project Deliverables, Constraints, Assumptions, Dependencies, Risks, Performance Measures, Approval, Project Governance Structure Outcomes, etc.

		<b>Types of Work envisioned under the BPA – Program Management, Consulting, Training Support, Accountants</b>
<b>3.31</b>		Develop a Preliminary Project Scope Statement that includes but not limited to project constraints, assumptions, objectives, boundaries, requirements, deliverables, etc.
<b>3.32</b>		Develop comprehensive WBS to sufficient detail where cost and schedule can be reliably estimated (work package and control account level). Include resources projections for each task, responsibility matrix, and a WBS Dictionary
<b>3.33</b>		Develop detailed Project Schedule to include activity definition, task dependencies and duration, Critical Path, and resource projections by task. Schedules shall be linked to DFAS Transformation WBS structure.
<b>3.34</b>		Develop and maintain EVM metrics based on Project Cost, Schedule, and other performance data.
<b>3.35</b>		Identify and document risks associated with the project and provide and maintain a Risk Mitigation and Management Plan.
<b>3.36</b>		Develop and maintain a detailed communications plan that includes, but is not limited to, communication goals and objectives, communication channels, and target audience to include Senior Leadership updates. The communication schedule shall be linked to the detailed project schedule.

#### **4.0 Performance Measurement.**

Performance may be measured by the following as cited in each BPA Call:

- Timeliness of completion of tasks.
- Level of appropriate detail and completeness of processes within the final document.
- Quality of documents as compared to regulatory requirements, Accounting Standards, Department of Defense policy, etc.
- Quality/comparability of procedures text to process flow.
- Ease of understanding of materials by all levels of federal employees.
- Performance metrics are achieved or exceeded.
- Accurate reports are delivered by required due dates.
- Abnormal balances and accounting discrepancies are resolved timely.
- SOPs and desktop procedures are accurate and up-to-date.
- Accounting system general ledgers and feeder systems are balanced to supporting files.
- Undistributed disbursements and collections are resolved or corrections identified.
- Assigned tasks and audit inquiries are met within established due dates.
- Financial data integrity is enhanced through analysis and research.
- System requirements are documented and changes adequately tested.
- Required reports are developed using approved DFAS software.

#### **GROUP TWO**

##### **Statement of Work**

#### **DFAS TRANSFORMATION SOLUTIONS I**

##### **GROUP TWO**

#### **HUMAN RESOURCES AND TRAINING**

#### **5.0 Objective:**

To provide the Defense Finance and Accounting Service (DFAS) with services to support the DFAS mission, ongoing activities, and new initiatives as a result of, or directly related to the agency's Transformation mission. The contractor shall provide the services described in this statement of work required to meet the objectives of DFAS as directed in each BPA Call

#### **2.0 Requirements:**

The contractor will provide services to DFAS under one or more of the following GSA Federal Supply Schedule (FSS) Categories and SINS:

Schedule 738	Human Resources & EEO
SINS:	595 21: Human Resource Services

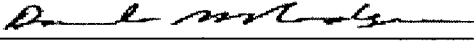
Schedule 69      Training Aids & Devices: Instructor Led, Course Development & Test Administration  
 SINS:            27 200: Prepared Printed Instructional Material  
                      27 300: Prepared Audio & Visual Instructional Material  
                      27 400: Instructor Led Training  
                      27 500: Course Development and Test Administration

### 3.0 Tasks:

Tasks required to be performed under this BPA will include those described herein. Specific task requirements and deliverables will be described in individual BPA Calls and specifically priced prior to issuance of the Call. Services anticipated to be required are:

	Labor Support	Types of Work envisioned under the BPA – HR and Training Support
3.1	Human Resources	<ul style="list-style-type: none"> <li>Human Resource Services may include providing support in the functions of planning, recruitment and internal placement, pre-employment screening - background investigations, position classification, personnel actions, training, employee assistance, employee relations, outplacement, function review/integration services and worker's compensation.</li> <li>The contractor must have knowledge of federal personnel programs sufficient to understand specialized terminology relating to Reduction-In-Force, Veterans Preference, Department of Defense placement programs, and the congressional oversight process.</li> <li>The contractor must have knowledge of Veteran and Federal Government benefits programs, unemployment compensation, and financial planning.</li> <li>The contractor shall produce adhoc material/handouts in support of senior leadership's presentation and briefing requirements.</li> <li>Consults with HR technical experts and provides advice and assistance to on site managers. Advocates for on site managers with HR as to the management position on specific issues. Attend site staff meetings and coordinate issues arising from the meeting with HR technical staff.</li> <li>Serves as an advisor to the business office on the proper creation, coordination and submission of RPAs. Serve as centralized coordination point for realignment/reorganization packages.</li> <li>Provides assistance to employees and applicants at the site on a variety of HR related systems, i.e EBIS, Resumix, IDP, general information on how to apply for a job, completion and</li> </ul>

	Labor Support	Types of Work envisioned under the BPA – HR and Training Support
		<p>submission of personnel security related forms, etc. Prepare reports from HRBID as requested by management. Analyze results of reports and provide analysis to senior site management. Coordinate report requests with HR for data not available through HRBID. Ensures that new employees are in-processed. Participates in exit survey process of departing employees. Provide employee recognition awards such as length of service.</p> <ul style="list-style-type: none"> <li>• Serves as focal point for the site director coordinating personnel security-related issues to include the following: Provides guidance to management regarding proper position sensitivity designations; coordinates with Contract Office Representatives to ensure proper submission of forms required for contractors; coordinates requests for reconsideration for site director; delivers official security-related actions to employees (Letters of Denial, Requests for Additional Information, Statements of Reason, etc.); develops reports and analyses for site director regarding personnel security program operations.</li> <li>• Provides assistance to management on recruitment strategies, recruitment sources, how to work referral lists/certificate of eligibles. Coordinates on proper fund site for PCS orders.</li> <li>• Provides advice to management on construction and administration of pay pools. Performs pay for performance analyses for the site.</li> <li>• Provide general LR advice to management after consulting with HR technical staff, such as duty to notify the union, duty to negotiate, etc. on specific issues. Assists management and HR in preparing and providing written notification to the local union on issues such as inclement weather issues, granting of administrative leave, etc.</li> <li>• Performs learning consultant services. Participates in on site HR related supervisory training such as the Basic Supervisory Course.</li> </ul>
3.2	Training	<ul style="list-style-type: none"> <li>• Instructor Led Training Includes General Education, Computer, Vocational/Trade, Health/Safety, Business (Excluding procurement training courses developed by FAI (Federal Acquisition Institute and DAU (Defense Acquisition University) .</li> <li>• Classroom Instructional Concepts – The</li> </ul>

<b>AMENDMENT OF SOLICITATION/MODIFICATION OF CONTRACT</b>				1. CONTRACT ID CODE		PAGE OF PAGES 1   2	
2. AMENDMENT/MODIFICATION NO. <b>P00001</b>		3. EFFECTIVE DATE <b>01-Mar-2009</b>		4. REQUISITION/PURCHASE REQ. NO.		5. PROJECT NO.(If applicable)	
6. ISSUED BY CODE  DEFENSE FINANCE AND ACCOUNTING SERVICE CONTRACT SERVICES DIRECTORATE BLDG 21/ 2B218 3990 EAST BROAD STREET COLUMBUS OH 43213-1152		7. ADMINISTERED BY (If other than item 6) CODE  <b>See Item 6</b>		8. NAME AND ADDRESS OF CONTRACTOR (No., Street, County, State and Zip Code) BOOZ ALLEN AND HAMILTON 8283 GREENSBORO DRIVE MCCLEAN VA 22102		9A. AMENDMENT OF SOLICITATION NO.	
CODE 17038		FACILITY CODE		9B. DATED (SEE ITEM 11)		10A. MOD. OF CONTRACT/ORDER NO. HQ0423-08-A-0001	
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<input type="checkbox"/> The above numbered solicitation is amended as set forth in Item 14. The hour and date specified for receipt of Offer <input type="checkbox"/> is extended, <input type="checkbox"/> is not extended. Offer 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 _____ 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 you 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 APPLIES ONLY TO MODIFICATIONS OF CONTRACT/ORDERS. IT MODIFIES THE CONTRACT/ORDER NO. AS DESCRIBED IN ITEM 14.							
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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).							
X C. THIS SUPPLEMENTAL AGREEMENT IS ENTERED INTO PURSUANT TO AUTHORITY OF: FAR 52.212-4(c) - Contract Terms and Conditions (Commercial Items) Changes							
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.) Modification Control Number: varthur09366 Reference BPA Master Agreement Page 2 of 19, Section B-Supplies or Services and Prices, "BPA Master Dollar Limit: delete \$20,000,000.00 without substitution. "BPA Call Limit: delete \$3,000,000.00 and substitute \$40,000,000.00.  Reference BPA Master Agreement, Page 13 of 19, Section H-Item 3, BPA Term: Delete the last sentence "The BPA ceiling is \$40,000,000.00" in its entirety without substitution. The reference to \$40,000,000.00 was intended to be a high estimate of the total value of BPA Calls to be issued. Since this is an estimate, the total value of orders issued under the BPA may exceed this total as long as they are within scope and issued during the term of the agreement.							
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)				16A. NAME AND TITLE OF CONTRACTING OFFICER (Type or print) DANIEL M RODGERS / CONTRACT SPECIALIST TEL: 614-693-0115 EMAIL: Daniel.Rodgers@dfas.mil			
15B. CONTRACTOR/OFFEROR  (Signature of person authorized to sign)		15C. DATE SIGNED		16B. UNITED STATES OF AMERICA BY  (Signature of Contracting Officer)		16C. DATE SIGNED 02-Mar-2009	

**SECTION SF 30 BLOCK 14 CONTINUATION PAGE**

**SUMMARY OF CHANGES**

**SECTION A - SOLICITATION/CONTRACT FORM**

The overall BPA limit has been deleted.

The limit per BPA call has increased by \$10,000,000.00 from \$30,000,000.00 to \$40,000,000.00.



<b>ORDER FOR SUPPLIES OR SERVICES</b>										PAGE 1 OF 19			
1. CONTRACT/PURCH. ORDER/ AGREEMENT NO. HQ0423-08-A-0001			2. DELIVERY ORDER/ CALL NO.		3. DATE OF ORDER/CALL 2007 Oct 30		4. REQ./ PURCH. REQUEST NO.			5. PRIORITY			
6. ISSUED BY DEFENSE FINANCE AND ACCOUNTING SERVICE CONTRACT SERVICES DIRECTORATE BLDG 21/ 2B218 3990 EAST BROAD STREET COLUMBUS OH 43213-1152				CODE HQ0423		7. ADMINISTERED BY  <b>SEE ITEM 6</b>				8. DELIVERY FOB <input type="checkbox"/> DEST <input checked="" type="checkbox"/> OTHER  (See Schedule if other)			
9. CONTRACTOR BOOZ ALLEN AND HAMILTON 8283 GREENSBORO DRIVE MCCLEAN VA 22102				CODE 17038		FACILITY		10. DELIVER TO FOB POINT BY (Date) <b>SEE SCHEDULE</b>			11. MARK IF BUSINESS IS <input type="checkbox"/> SMALL <input type="checkbox"/> SMALL DISADVANTAGED <input type="checkbox"/> WOMEN-OWNED		
12. DISCOUNT TERMS Net 30 Days								13. MAIL INVOICES TO THE ADDRESS IN BLOCK See Item 15					
14. SHIP TO  <b>SEE SCHEDULE</b>				CODE		15. PAYMENT WILL BE MADE BY DEFENSE FINANCE AND ACCOUNTING SERVICE ATTN INVP DAFS 8899 EAST 56TH STREET INDIANAPOLIS IN 46249-1510				CODE HQ0347			
16. DELIVERY/ CALL This delivery order/call is issued on another Govt. agency or in accordance with and subject to terms and conditions of above numbered contract.													
16. PURCHASE Reference your quote dated Furnish the following on terms specified herein. REF:													
ACCEPTANCE. THE CONTRACTOR HEREBY ACCEPTS THE OFFER REPRESENTED BY THE NUMBERED PURCHASE ORDER AS IT MAY PREVIOUSLY HAVE BEEN OR IS NOW MODIFIED, SUBJECT TO ALL OF THE TERMS AND CONDITIONS SET FORTH, AND AGREES TO PERFORM THE SAME.													
NAME OF CONTRACTOR				SIGNATURE				TYPED NAME AND TITLE				DATE SIGNED (YYYYMMDD)	
<input checked="" type="checkbox"/> If this box is marked, supplier must sign Acceptance and return the following number of copies: 1													
17. ACCOUNTING AND APPROPRIATION DATA/ LOCAL USE													
18. ITEM NO.		19. SCHEDULE OF SUPPLIES/ SERVICES				20. QUANTITY ORDERED/ ACCEPTED*		21. UNIT		22. UNIT PRICE		23. AMOUNT	
<b>SEE SCHEDULE</b>													
* If quantity accepted by the Government is same as quantity ordered, indicate by X. If different, enter actual quantity accepted below quantity ordered and encircle.						24. UNITED STATES OF AMERICA TEL: 614-693-0115 EMAIL: Daniel.Rodgers@dfas.mil BY: DANIEL M RODGERS				25. TOTAL		29. DIFFERENCES	
26. QUANTITY IN COLUMN 20 HAS BEEN <input type="checkbox"/> INSPECTED <input type="checkbox"/> RECEIVED <input type="checkbox"/> ACCEPTED, AND CONFORMS TO THE CONTRACT EXCEPT AS NOTED  DATE SIGNATURE OF AUTHORIZED GOVT. REP.						27. SHIP NO.		28. DO VOUCHER NO.		30. INITIALS		33. AMOUNT VERIFIED CORRECT FOR	
36. I certify this account is correct and proper for payment.  DATE SIGNATURE AND TITLE OF CERTIFYING OFFICER						31. PAYMENT <input type="checkbox"/> COMPLETE <input type="checkbox"/> PARTIAL <input type="checkbox"/> FINAL		32. PAID BY		34. CHECK NUMBER		35. BILL OF LADING NO.	
37. RECEIVED AT		38. RECEIVED BY		39. DATE RECEIVED (YYYYMMDD)		40. TOTAL CONTAINERS		41. S/R ACCOUNT NO.		42. S/R VOUCHER NO.			

**Section B - Supplies or Services and Prices**

BPA Master Dollar Limit: \$40,000,000.00

BPA Call Limit: \$30,000,000.00

Period of Performance: 30-Oct-2007 to 29-Oct-2012

FSC Codes:

R710

## Section C - Descriptions and Specifications

GROUP ONE**Statement of Work****DFAS TRANSFORMATION SOLUTIONS I****GROUP ONE****PROGRAM MANAGEMENT, ACCOUNTING, CONSULTING AND TRAINING SERVICES****1.0 Objective:**

To provide the Defense Finance and Accounting Service (DFAS) with services to support the DFAS mission, ongoing activities, and new initiatives as a result of, or directly related to the agency's Transformation mission. The contractor shall provide the services described in this statement of work required to meet the objectives of DFAS as directed in each BPA Call.

**2.0 Requirements:**

The contractor will provide services to DFAS under one or more of the following GSA Federal Supply Schedule (FSS) Categories and SINS:

## Schedule MOBIS Mission Oriented Business Integrated Services

SINS: 874 1: Consulting Services  
 874 4: Training Services  
 874 5: Support Products  
 874 7: Program Integration and Project Management Services

## Schedule 520 Financial and Business Solutions

SINS: 520 11: Accounting  
 520 12: Budgeting  
 520 13: Complementary Financial Management Services  
 520 14: Audit and Financial Training Services  
 520 7: Financial and Performance Audits  
 520 9: Recovery Audits

## Schedule PES Professional Engineering Services

SINS: 871 1: Strategic Planning for Technology Programs/Activities  
 871 2: Concept Development and Requirements Analysis  
 871 3: System Design, Engineering and Integration  
 871 4: Test and Evaluation  
 871 5: Integrated Logistics Support  
 871 6: Acquisition and Life Cycle Management  
 871 1: Schedule Brochure

**3.0 Tasks:**

Tasks required to be performed under this BPA will include those described herein. Specific task requirements and deliverables will be described in the BPA Call and specifically priced prior to the issuance of the Call. Services anticipated are:

		<b>Types of Work envisioned under the BPA – Program Management, Consulting, Training Support, Accountants</b>
<b>3.1</b>	<b>Consultant</b>	Participate in meetings and other forums to provide assistance in planning and development of work products.
<b>3.2</b>		Prepare implementation plans for identified improvements for training, metrics, monitoring and control for business processes.
<b>3.3</b>		Prepare, deliver, and maintain work products based on PMBOK standards, DFAS instructions and other tools identified by the work group.
<b>3.4</b>		Prepare meeting notes, summaries, reports and other information requested by the PMO during participation in meetings and other forums.
<b>3.5</b>		Provide analytical skills/tools, advice and recommendations on best business practices, methodologies and other tools to help the PMO in the identification of sources of data.
<b>3.6</b>		Prepare documentation in support of a single end-to-end reporting process flow document.
<b>3.7</b>		Participate and assist in the development of cost estimation/cost methodology. Provide advice and recommendations on best business practices, methodologies, and standards to determine cost estimation/cost methodology.
<b>3.8</b>		Review audit findings and recommendations and perform the following: <ul style="list-style-type: none"> <li>• Summarize key issues</li> <li>• Track the status of corrective actions and ongoing initiatives that arise from audits, reviews and self-identified improvements</li> <li>• Participate in communications with management and audit entities</li> <li>• Support populating the database to capture issues and actions</li> <li>• Support weekly reporting process</li> </ul>
<b>3.9</b>		Provide advice and recommendations on best business practices, methodologies and other tools to help DFAS in re-engineering the process.
<b>3.10</b>		Develop training program(s) for target audiences identified by DFAS. Training could include both automated and manual processes identified in “as is” or “to be” models.
<b>3.11</b>		Review DoD regulatory requirements to provide input/advice/recommendations to DFAS on development of processes or resolution of issues.

		<b>Types of Work envisioned under the BPA – Program Management, Consulting, Training Support, Accountants</b>
3.12		Provide advice and recommendations in the identification of the requirements for report to reconcile budget execution with cost
3.13		<p>Develop user requirements documentation for:</p> <ul style="list-style-type: none"> <li>• Comptroller</li> <li>• DFAS</li> <li>• OUSD(C) P/B</li> <li>• Components</li> <li>• DoD External customers/stakeholders including Congress &amp; GAO</li> </ul> <p>Use templates, formats, instructions, tools and other guidance provided by the PMO to document the process.</p>
3.14		Develop documentation for the “As Is” processes. Use templates, formats, instructions, tools and other guidance to document the process, identify reporting gaps, and recommend corrective actions
3.15		Develop user requirements documentation.
3.16		Develop and maintain a prioritized list of recommendations of improvements. Participate and assist in the identification of the improvement strategies. Provide advice and recommendations on best business practices, methodologies, measures and other tools to help DFAS in developing an improved process.
3.17		<p>Provide advice, recommendations, and assistance on best business practices, methodologies, and Business Intelligence tools to meet capabilities and customer requirements in the following areas:</p> <ul style="list-style-type: none"> <li>• Developing reports</li> <li>• Documenting requirements</li> <li>• Defining the frequency of reporting data</li> <li>• Determining the timeliness of reporting data</li> <li>• Defining the content delivery and data retention requirements of reporting data</li> </ul> <p>Determining improvements to access detailed information rapidly</p>
3.18		Assessing the current status and needs of the identified location and/or business area.
3.19		Assist in assessing, correcting, and reporting on internal control in accordance with OMB circular A-123.
3.20		Assist in the integration of business activity modeling and reporting for management internal controls

		<b>Types of Work envisioned under the BPA – Program Management, Consulting, Training Support, Accountants</b>
3.21		Conducting data collection and requirements analysis.
3.22		Identifying the target state operational environment.
3.23		Perform activity based costing studies
3.24		Creating detailed project management plans.
3.25	<b>Accountant</b>	The contractor shall research, analyze and prepare financial reports to support the Reports and Analysis Division and a clean financial opinion.
3.26		The contractor shall research, analyze and prepare accounting requirements, reports, and general ledger extracts to support the General Ledger Division and a clean financial opinion.
3.27		The contractor shall research, analyze and prepare audited financial statements and associated data to support the Audited Financial Statements Division and a clean financial opinion.
3.28		Contractor shall provide research and reconciliation support services to deliver financial reports in accordance with established schedules.
3.29	<b>Training</b>	The contractor shall apply adult learning principles throughout course instruction. Contractor shall thoroughly prepare and understand the stated course learning objectives prior to instructing. Contract instructors shall communicate the stated learning objectives to the students within the scheduled class hours. The contractor shall discuss the enabling learning objectives for each unit of instruction and answer student questions pertaining to those objectives. Contractor instructors shall be subject matter experts. Contractor shall use mobile training teams to provide training at locations specified and shall deliver training for DFAS employees.
3.30	<b>Program Management</b>	Develop and maintain a Project Charter that includes, but not limited to, Project Purpose, Project Scope, Project Objectives, Roles and Responsibilities, Project Approach, Project Deliverables, Constraints, Assumptions, Dependencies, Risks, Communications, Performance Measures, Approval, Project Governance Structure Outbreak, etc.

		<b>Types of Work envisioned under the BPA – Program Management, Consulting, Training Support, Accountants</b>
<b>3.31</b>		Develop a Preliminary Project Scope Statement that includes but not limited to project constraints, assumptions, objectives, boundaries, requirements, deliverables, etc.
<b>3.32</b>		Develop comprehensive WBS to sufficient detail where cost and schedule can be reliably estimated (work package and control account level). Include resources projections for each task, responsibility matrix, and a WBS Dictionary
<b>3.33</b>		Develop detailed Project Schedule to include activity definition, task dependencies and duration, Critical Path, and resource projections by task. Schedules shall be linked to DFAS Transformation WBS structure.
<b>3.34</b>		Develop and maintain EVM metrics based on Project Cost, Schedule, and other performance data.
<b>3.35</b>		Identify and document risks associated with the project and provide and maintain a Risk Mitigation and Management Plan.
<b>3.36</b>		Develop and maintain a detailed communications plan that includes, but is not limited to, communication goals and objectives, communication channels, and target audience to include Senior Leadership updates. The communication schedule shall be linked to the detailed project schedule.

#### **4.0 Performance Measurement.**

Performance may be measured by the following as cited in each BPA Call:

- Timeliness of completion of tasks.
- Level of appropriate detail and completeness of processes within the final document.
- Quality of documents as compared to regulatory requirements, Accounting Standards, Department of Defense policy, etc.
- Quality/comparability of procedures text to process flow.
- Ease of understanding of materials by all levels of federal employees.
- Performance metrics are achieved or exceeded.
- Accurate reports are delivered by required due dates.
- Abnormal balances and accounting discrepancies are resolved timely.
- SOPs and desktop procedures are accurate and up-to-date.
- Accounting system general ledgers and feeder systems are balanced to supporting files.
- Undistributed disbursements and collections are resolved or corrections identified.
- Assigned tasks and audit inquiries are met within established due dates.
- Financial data integrity is enhanced through analysis and research.
- System requirements are documented and changes adequately tested.
- Required reports are developed using approved DFAS software.

#### **GROUP TWO**

##### **Statement of Work**

#### **DFAS TRANSFORMATION SOLUTIONS I**

##### **GROUP TWO**

#### **HUMAN RESOURCES AND TRAINING**

#### **5.0 Objective:**

To provide the Defense Finance and Accounting Service (DFAS) with services to support the DFAS mission, ongoing activities, and new initiatives as a result of, or directly related to the agency's Transformation mission. The contractor shall provide the services described in this statement of work required to meet the objectives of DFAS as directed in each BPA Call

#### **2.0 Requirements:**

The contractor will provide services to DFAS under one or more of the following GSA Federal Supply Schedule (FSS) Categories and SINS:

Schedule 738	Human Resources & EEO
SINS:	595 21: Human Resource Services



Schedule 69      Training Aids & Devices: Instructor Led, Course Development & Test Administration  
 SINS:            27 200: Prepared Printed Instructional Material  
                      27 300: Prepared Audio & Visual Instructional Material  
                      27 400: Instructor Led Training  
                      27 500: Course Development and Test Administration

### 3.0 Tasks:

Tasks required to be performed under this BPA will include those described herein. Specific task requirements and deliverables will be described in individual BPA Calls and specifically priced prior to issuance of the Call. Services anticipated to be required are:

	Labor Support	Types of Work envisioned under the BPA – HR and Training Support
3.1	Human Resources	<ul style="list-style-type: none"> <li>Human Resource Services may include providing support in the functions of planning, recruitment and internal placement, pre-employment screening - background investigations, position classification, personnel actions, training, employee assistance, employee relations, outplacement, function review/integration services and worker's compensation.</li> <li>The contractor must have knowledge of federal personnel programs sufficient to understand specialized terminology relating to Reduction-In-Force, Veterans Preference, Department of Defense placement programs, and the congressional oversight process.</li> <li>The contractor must have knowledge of Veteran and Federal Government benefits programs, unemployment compensation, and financial planning.</li> <li>The contractor shall produce adhoc material/handouts in support of senior leadership's presentation and briefing requirements.</li> <li>Consults with HR technical experts and provides advice and assistance to on site managers. Advocates for on site managers with HR as to the management position on specific issues. Attend site staff meetings and coordinate issues arising from the meeting with HR technical staff.</li> <li>Serves as an advisor to the business office on the proper creation, coordination and submission of RPAs. Serve as centralized coordination point for realignment/reorganization packages.</li> <li>Provides assistance to employees and applicants at the site on a variety of HR related systems, i.e EBIS, Resumix, IDP, general information on how to apply for a job, completion and</li> </ul>

	<b>Labor Support</b>	<b>Types of Work envisioned under the BPA – HR and Training Support</b>
		<p>submission of personnel security related forms, etc. Prepare reports from HRBID as requested by management. Analyze results of reports and provide analysis to senior site management. Coordinate report requests with HR for data not available through HRBID. Ensures that new employees are in-processed. Participates in exit survey process of departing employees. Provide employee recognition awards such as length of service.</p> <ul style="list-style-type: none"> <li>• Serves as focal point for the site director coordinating personnel security-related issues to include the following: Provides guidance to management regarding proper position sensitivity designations; coordinates with Contract Office Representatives to ensure proper submission of forms required for contractors; coordinates requests for reconsideration for site director; delivers official security-related actions to employees (Letters of Denial, Requests for Additional Information, Statements of Reason, etc.); develops reports and analyses for site director regarding personnel security program operations.</li> <li>• Provides assistance to management on recruitment strategies, recruitment sources, how to work referral lists/certificate of eligibles. Coordinates on proper fund site for PCS orders.</li> <li>• Provides advice to management on construction and administration of pay pools. Performs pay for performance analyses for the site.</li> <li>• Provide general LR advice to management after consulting with HR technical staff, such as duty to notify the union, duty to negotiate, etc. on specific issues. Assists management and HR in preparing and providing written notification to the local union on issues such as inclement weather issues, granting of administrative leave, etc.</li> <li>• Performs learning consultant services. Participates in on site HR related supervisory training such as the Basic Supervisory Course.</li> </ul>
<b>3.2</b>	<b>Training</b>	<ul style="list-style-type: none"> <li>• Instructor Led Training Includes General Education, Computer, Vocational/Trade, Health/Safety, Business (Excluding procurement training courses developed by FAI (Federal Acquisition Institute and DAU (Defense Acquisition University) .</li> <li>• Classroom Instructional Concepts – The</li> </ul>