

**National Preparedness Assessment Division (NPAD)**  
**Disaster Services Support Contract**  
**DR- 4781-TX Individual Assistance Reform Assessment – PART 2**  
**Performance Work Statement**  
**November 26, 2024**

**Purpose**

The purpose of this Performance Work Statement (PWS) is to initiate a Call Order from the Continuous Improvement Program (CIP) Disaster Support Blanket Purchase Agreement (BPA) for disaster support services to support Federal Emergency Management Agency (FEMA) efforts focused on assessing recent Individual Assistance (IA) program reforms for recent Region 6 disasters, including DR-4781-TX. This support is anticipated to culminate in the development of Evaluation Case Studies for specific reforms, and a final After-Action Report.

FEMA has an imperative to learn from disaster operations and better understand the challenges and successes experienced throughout the execution of FEMA's operational mission. This event presents an opportunity to support the Agency, Region, and field in capturing and disseminating best practices and lessons learned.

This after-action review and resulting products will provide FEMA with understanding of implementation of the recent Individual Assistance Program Reforms as well as serve as a platform to plan for longer term/larger scale program evaluation. This effort will assist planning and preparedness efforts for the current hurricane season, shape strategic planning and future performance metrics, and recommend operational improvements. The after-action review process will be driven by objective collection of qualitative and quantitative evidence, examining root causes, and recommending solutions that are actionable and impactful.

**Background**

In order to improve the disaster survivor experience, FEMA has worked to identify and initiate regulatory changes to the Individual Assistance program. These changes seek to simplify processes, remove barriers to access services, and increase eligibility for certain types of assistance under the program. The regulatory and procedural reforms identified are in effect for disasters declared on or after March 22, 2024, and are open for public comment through July 22, 2024.

FEMA Region 6 has had three disasters declared since the reforms were in effect with DR-4781-TX being the largest application of the reforms nationwide to date. The intent of the products resulting from the call order is to provide the Individual Assistance program with an immediate feedback loop to make operational improvements in implementing the new reforms as well as begin planning and evidence building that will support longer term evaluation of the reforms.

CIP is responsible for leading after-action review efforts in coordination with field and regional leadership. The success of the after-action review is not in the generation of a report itself, but in leadership's engagement and support of the implementation of actions to address identified areas for improvement, sustainment of strengths, and codification of best practices. The end products intend to propose deliberate Courses of Action (COAs) at the disaster, within the Region, or at the HQ level to enable a posture that better serves people and communities before, during and after disasters.

This call order is intended to support collection efforts on the IA program reforms in DR-4781-TX but can be used for similar declared disasters at the discretion and agreement of all involved parties. Regional or HQ CIP staff may clarify product expectations for products and may provide examples to support their expected deliverable approach for After-Action Reviews, Quick Look Reports, and other interim products. The final after-action reviews will be in line with CIP national templates, standards, and guidance. Discrepancies will be adjudicated by the COR or designee.

### **Scope**

#### **Project Dates: 365 Days from Award**

The focus of this CO is to support the after-action review of IA program reforms for Region 6 disaster operations, including DR-4781-TX, but can be used for similar declared disasters at the discretion and agreement of all involved parties.

Initial priorities include but are not limited to:

- Operational implementation of reforms in responder training, FEMA systems, and communications
- Effectiveness of programmatic reforms
- Staffing and deployment of IA operation

The products anticipated for this effort include:

- **Reform Evaluation Case Studies (up to six anticipated)** which will conduct a systematic review of a specific reforms, including mapping of the expected process, identifications of deviations from the expected process, analysis of existing data sets to gather survivor sentiment and any potential relationship to the reforms, and early Responder impressions of policy/process gaps, strengths, and/or needs for clarification.
- **After-Action Report** which will expound on the early QLR findings and incorporate evaluation case studies as chapters of a single overarching report.

Priorities and topics for case studies may be amended and updated by the CIP staff in coordination with field and/or regional leadership, COR, and Task Lead based upon available resources. Case studies will build upon the Evaluation Plan developed in the Call Order covering part 1 of this project.

The after-action review process will include planning, research, analysis, interviews, process mapping, the development of interim findings, briefings, and resolution sessions.

## **Objective**

The objective of this PWS is to provide FEMA with timely and effective learning from the implementation of IA programmatic reforms in response to recent Region 6 disasters in accordance with the disaster collection priorities. This includes providing objective, process-oriented analysis of what happened, and implementable, experience-based recommendations on how FEMA can improve to meet future events. Additionally, the assessment team will build on the experience-based perspective to inform deeper quantitative and process-oriented analysis to better understand the effects of specific program reforms in improving the survivor experience of IA programs.

Product recommendations should include proposed improvements to FEMA process, workforce readiness, systems, and tools to effectively implement IA reforms, targeting both those recommendations that are achievable in the immediate future as well as longer term recommendations. The immediate future are those recommendations that can be addressed by the early part of the 2024 hurricane season (prior to the end of August 2024), and the long-term recommendations are those that will require finalization prior to the 2025 hurricane season and beyond.

## **Tasks**

The contractor shall provide necessary services to conduct the management of this Call Order, and the technical knowledge, skills, and abilities to complete all the deliverables. The contractor shall provide the services necessary to design a methodology, conduct research, collect information, to conduct data analysis, to develop and finalize formal products, and support briefing of results.

The contractor will integrate as part of FEMA's CIP Team in support of the Region's collection priorities. The contractor will serve in a variety of roles including planning collections, leading tasks, supporting tasks, providing expertise and insight, conducting interviews, working as part of interdisciplinary teams, conducting analysis and research, and writing drafts of reports. It is the expectation of the Government that the contractor will take a flexible approach to help CIP achieve the after-action review requirements.

The contractor shall acknowledge receipt of this CO to support the stated after-action reviews for disaster operations to the contracting officer or designee via email within one (1) business day of receipt. The contractor shall perform the following tasks in coordination with and under the direction of the Government. Interim products will require varying approaches based on regional requirements.

## **Quality**

All products and deliverables must meet government acceptable quality standards as set forth within the agreed upon Quality Control Plan (QCP) and Disaster BPA Call Order Quality Assurance and Quality Control (QA/QC) Approach to be accepted by the government. Products/deliverables that fail to meet these standards may be subject to contractor rework at the time/labor/cost risk of the contractor and at the discretion of the government.

### **Task 1: Program Management**

- Initiate, execute, and maintain the appropriate project management products, processes, and systems to complete this task and deliverables.
- Modify/Apply the BPA Quality Control Plan (QCP) and Disaster BPA Call Order Quality Assurance And Quality Control (QA/QC) Approach to be call order specific and that includes a self-inspection plan for documents, deliverables and processes, an internal staffing plan, and an outline of the procedures the contractor shall use to maintain quality, timelines, and responsiveness for this CO and deliverables. This will be approved, supervised, and maintained by COR, Task Lead, or designee(s).
- Develop milestone and deliverable schedule including work breakdown structure. Changes to timelines are subject to change depending on circumstances and when all parties agree.
- Conduct regularly scheduled progress reviews and develop reports to assess the status of activities in coordination with the Task Lead, COR, or designee. Each review shall provide insight for this CO into past and projected expenditures, staffing levels, project accomplishments, upcoming milestones, and potential risks. The briefs should identify potential problems and risks while also outlining alternate or recommended solutions.
- COR and Task Lead will be provided copies of all CO deliverables.
- Monthly reports of activities (more often if requested) are required for the COR, Task Lead, or designee consistent with Contract requirements.

## **Task 2: Methodology Design, Research, and Data Collection**

- Support the determination of focus areas, priorities, and research questions, to include the incorporation of field and Regional leadership inputs, and the National Collection Analysis Priorities (NCAP) for the FEMA after-action review.
- Identify and develop product methodologies and evaluation plans, and review with the government for comment and approval.
- Develop the data collection plan and schedule resulting from the product methodologies, including the relevant research methods to collect, analyze, and validate information and data required to complete the products as set forth in the CO.
- Establish the deliverables schedule for all CO products. Changes to timelines are subject to change depending on circumstances when all parties agree.
- Research laws, authorities, regulations, standards, policies, procedures, processes, systems, and tools related to the data collection plan for the CO products.
- Conduct interviews, surveys (with required approval), group interviews, focus groups, document review and analysis.
- Support the determination of data sources.
- Facilitate working groups, and other stakeholder engagement activities.
- Conduct briefings with field, regional, and HQ leadership in coordination with the Regional CIP staff and Task Lead. Initial briefings and post-collection briefings with field leadership are expected unless specifically declined by leadership. Additional briefings should be provided based upon requests from field, regional, or HQ leadership.

## **Task 3: Data Analysis & Validation**

- Perform root cause and process-based analysis on data collected.
- Conduct information coding and information analysis.
- Perform quantitative and qualitative analysis on source data and data obtained from other programs and source data to verify the information collected and provide background, context, and perspective.
- Support validation of findings through interviews, surveys, and other engagements.
- If needed, complete additional data collection beyond what individual data collection has not captured.



#### **Task 4: Product Development**

- Develop a requirements analysis and success criteria for each product, for government review and approval.
- Lead the development of each product as identified in the scope.
- Provide relevant Subject Matter Experts, and coordinate with the applicable government Subject Matter Experts and identified stakeholders to support the review and development of products and adjudicate their feedback for updates of the report and associated documents.
- Create other communication products as requested by Task Lead, COR, or designee.
- Support the input, tracking, management, and reporting of findings in the approved system of record as well as any applicable communication materials.

#### **Task 5: Finalization of the Products**

- Support efforts to prepare deliverables for public release, as applicable.
- Support the review, adjudication, and clearance processes as applicable for each product or deliverable, to include formatting, grammar, 508 compliance, etc.
- Lead a project self-assessment and report development for learning on future after-action review efforts.

## Plan of Action and Milestones

Table 1 outlines the main milestones as established in this CO with estimated dates of execution and completion. Dates of deliverables are estimates only and can shift to the right at the agreement of all parties.

*Table 1: Deliverables and Milestones*

Activities / Deliverables / Milestones	Description	Estimated Date
<b>Call Order Kickoff Meeting</b>	Call Order kickoff meeting to initiate project.	5 business days from CO award
<b>Call Order Draft PMP</b>	Initial Draft Project Management Plan for CO Execution, including deliverable schedule and work breakdown structure.	Presented at Kickoff Meeting
<b>Call Order Final PMP</b>	Final Draft Project Management Plan for CO Execution, updates and corrections conducted as needed.	Within 10 business days of Kickoff Meeting occurring
<b>Deliverable 1: Evaluation Case Study – Serious Needs Assistance</b>	Develop an Evaluation Case Study which systematically reviews process changes, process implementation, data sets, Responder impressions, and systems, tools, policy, and guidance for implementation.	December 2024
<b>Deliverable 2: Evaluation Case Study – Displacement Assistance</b>	Develop an Evaluation Case Study which systematically reviews process changes, process implementation, data sets, Responder impressions, and systems, tools, policy, and guidance for implementation.	December 2024
<b>Deliverable 3: Evaluation Case Study—Underinsured Survivors</b>	Develop an Evaluation Case Study which systematically reviews process changes, process implementation, data sets, Responder impressions, and systems, tools, policy, and guidance for implementation.	December 2024
<b>Deliverable 4: Evaluation Case Study—Simplified ONA (SBA removal)</b>	Develop an Evaluation Case Study which systematically reviews process changes, process implementation, data sets, Responder impressions, and systems, tools, policy, and guidance for implementation.	April 2025
<b>Deliverable 5: Evaluation Case Study—Home Repair Assistance</b>	Develop an Evaluation Case Study which systematically reviews process changes, process implementation, data sets, Responder impressions, and systems, tools, policy, and guidance for implementation.	April 2025
<b>Deliverable 6: Evaluation Case Study—Simplified Self-Employed Assistance</b>	Develop an Evaluation Case Study which systematically reviews process changes, process implementation, data sets, Responder impressions, and systems, tools, policy, and guidance for implementation.	April 2025

<b>Deliverable 7: IA Program Reform After-Action Report</b>	Develop an After-Action Report which aggregates Case Study and Quick Look Report results and builds a single based on learning throughout the course of all projects.	May 2025
<b>Products Finalized</b>	Finalize all products, and ensure they are distributed and posted to approved locations as relevant	June 2025
<b>Call Out Close Out</b>	Close out of CO and tasking (occurs when final deliverable approved)	August 2025

## Staffing

This call order requires three key personnel including the Call Order Project Executive who will oversee the Contract Team on the Call Order; Project Lead who will lead the team and be the government's primary point of contact, and a Senior Data Analyst. The team may be required to travel to disaster sites for data collection and validation, but data collection may be conducted virtually at the discretion of the HQ Task Lead.

The team will be supported by the Contract Project Executive, technical writing and editing, data visualization, graphics, and administrative and logistical support, as well.

*Table 2: Call Order anticipated labor categories, work location, hours for the period of performance, and number of staff in each labor category.*

Labor Category	Role	Degree	Years of Experience	Hours per Staff	# of Staff
<b>Mid-Level Project Executive-Contr</b>	Project Exec	Bachelors	15 years	19	1
<b>Senior Program Manager-Gov</b>	Program Manager	Bachelors	10 years	63	1
<b>Senior Project Manager-Contr*</b>	Project Lead	Bachelors	10 years	1080	1
<b>Senior Analyst-Contr</b>	Collection Team	Masters	10 years	760	1
<b>Mid-Level Analyst-Contr</b>	Collection Team	Bachelors	6 years	720	1
<b>Junior Analyst-Contr</b>	Collection Team	Bachelors	2 years	760	1
<b>Senior Analyst-Gov*</b>	Lead Data Analyst	Masters	10 years	300	1
<b>Mid-Level Analyst-Gov</b>	Data Analyst	Bachelors	6 years	300	1
<b>Mid-Level Data Visualization / Graphics Specialist-Contr</b>	Graphics	Bachelors	5 years	60	1
<b>Mid-Level Analyst-Contr</b>	Tech Edit	Bachelors	6 years	50	1

\* Indicates key personnel



## **Addendums**

- The contract team will follow all FEMA workforce health and safety guidance.
- As available and with the approval of the Task Lead and coordination by the COR or designee government property in the form of a government issued laptop will be provided for contractor use upon successful security adjudication.
- Mobile devices may be issued to any contractor while on a disaster site for safety/security where lifelines are disrupted for the duration of the time that they are at the disaster site. Mobile devices must be returned to the property custodian of the disaster prior to demobilization. Exceptions may be approved by the Task Lead provided an appropriate justification of need is provided.
- All products and deliverables from this call order including final products, drafts, interview notes etc. are the express property of the government. Permission by contractors to share or distribute this information to media or any outside source requires written approval from the contract officer and agreement from the program.
- FEMA's SharePoint and files are reserved for active task order work only. If access is needed for another specific purpose, contact the contractor PM, Task Lead, or COR.