

Statement of Work and Delivery Schedule

A. Background Information

Homelessness in the U.S. continues to be a social problem as well as a major public health concern. Approximately 2.1 million adults and 1.3 million children experience homelessness in any given year (Burt, M.R., Aron, L.Y., Lee, E., & Valente, J. [2001]. *Helping America's homeless: Emergency Shelter or Affordable Housing?* Washington, DC: The Urban Institute Press). In 2004, the Council of Mayors reported that 23% of the requests for emergency shelter went unmet (NAEH, 2005). Individuals with serious mental illness and/or substance use disorders are at particularly high risk, experiencing homelessness more often and for longer periods than other subgroups. The individual and societal costs of homelessness are profound and demand targeted and informed strategies for preventing and ending homelessness.

This Statement of Work (SOW) includes activities related to more than one (1) line item in the Substance Abuse and Mental Health Services' (SAMHSA) Center for Mental Health Services (CMHS) budget. It will be imperative that the Contractor implement internal controls to provide assurance that funds are spent for the designated purpose. The Contractor will be required to maintain an accounting system for each budget line item included in the contract. Proper accounting of funds is included in the performance review of this contract.

SAMHSA must continue to excel in its leadership role to assure the success of the Administration's goal of ending chronic homelessness by 2012, especially for people with mental or substance use disorders. SAMHSA is committed to ensuring the transformation goals of states' mental health service systems are met. These goals, outlined in the National Policy Academy (2003 through 2006) strategic planning process must be realized through the implementation of those multi-year plans. The Corporation for Supportive Housing has stated, "It is crucial that the federal government ensure that these efforts [to end chronic homelessness by 2012] are coordinated with essential targeted federal programs, like McKinney-Vento grants, as well as 'mainstream' programs such as Section 8, CDBG, and safety net resources, including Medicaid." In order to continue to provide States, and communities with innovative support and assistance, the Homeless Programs Branch (HPB) of the Division of Systems and Services Improvement (DSSI), CMHS, will develop an innovative National Resource Center on Homelessness (NRCH). The NRCH will rely on technology and imaginative support services to promote the agenda of the States' Strategic Plans to end Homelessness and to move those plans towards implementation. This will require an NRCH that is focused on working in collaboration with States and communities to provide innovative solutions to implementation barriers that hamper State realization of strategic goals and agenda.

The NRCH must spearhead the dissemination of best practices and policies not yet implemented in the field through training and TA (TA). The NRCH will also coordinate the synthesis of knowledge on emerging issues in Homelessness; convening expert

panels; developing of state-of-the-art policy papers; and developing workforce-related curricula, training, and manuals.

The NRCH is envisioned as a collaborative effort, led by a steering committee made up of public, private and consumer entities. The NRCH will focus on providing States the assistance they need to implement their multi-year strategic plans to end chronic homelessness.

The HPB, CMHS, serves as a lead within SAMHSA and the Department of Health and Human Services (DHHS) for administering programs and interdepartmental initiatives that meet the treatment, support service, and housing needs of persons who are homeless with serious mental illnesses and/or co-occurring substance abuse disorders. The HPB has initiated a broad array of service delivery, knowledge development and application, TA, and national leadership projects to assist States and localities in meeting the needs of this population.

As part of the Fiscal Year 1991 reauthorization of the Stewart B. McKinney Homeless Assistance Act, the President signed legislation creating the Projects for Assistance in the Transition from Homelessness (PATH) formula grant program. The PATH program provides funds to each State, the District of Columbia, Guam, American Samoa, the Commonwealths of Puerto Rico and the Northern Mariana Islands, and the Federal Territory of the Virgin Islands for the provision of services to individuals who have serious mental illnesses, or co-occurring serious mental illnesses and substance use disorders, and who are homeless or at imminent risk of becoming homeless (hereafter referred to as the "Client Population").

Eligible services to be provided under PATH include: outreach services; screening and diagnostic treatment services; habilitation and rehabilitation services; community mental health services; alcohol or drug treatment services; staff training; case management services; supportive and supervisory services in residential settings; referrals for primary health services, job training, and educational services; and relevant housing services. In addition, to improve coordination of services and housing for the target population, a limited set of housing services may be funded.

Among the provisions of the PATH legislation is the requirement that the Secretary of DHHS, "...provide TA to eligible entities in planning, developing, and operating programs...". This contract will constitute the implementation of this statutory requirement. "Eligible entities," in this instance, are the 56 State and Territorial mental health authorities that receive formula grant funds under the program. Each State/Territory has designated a primary contact person responsible for operation of the PATH program. This person is referred to as the State PATH Contact.

Overall, this contract is intended to support the HPB by developing a National Resource Center on Homelessness. The goal is to enhance the quality of life for homeless people with mental illness and co-occurring substance abuse disorders by encouraging the field to provide housing, treatment and appropriate supportive services, and to help end chronic homelessness.

B. Objectives

The objectives of this contract are to:

- Establish a National Resource Center on Homelessness (NRCH);
- Assist the HPB in transforming existing systems of care to better address homelessness;
- Create a learning community between stakeholders that will foster an environment of change and stimulate service system improvement;
- Convene a Steering Committee made up of public, private and consumer-based representatives to draft a strategic plan for the first three (3) years of the NRCH;
- Propose innovative solutions to promote the 10-year strategic plans developed by the States during recent Policy Academies to end Chronic Homelessness and to ensure the successful implementation of those plans.
- Update and maintain a national database of literature in the field;
- Establish and maintain a toll-free “800” number for responding to information requests;
- Maintain a website on homelessness;
- Organize, provide logistic support and conduct annual PATH meetings and a biennial national training conference on homelessness;
- Provide logistic support and implement workshops and trainings;
- Provide TA for services and systems improvement;
- Develop training materials;
- Develop curricula to support homeless services’ workforce. (i.e., providing online credentialed coursework, obtaining SAMHSA clearances, as necessary, developing web enabled coursework, maintaining the site, providing web-trends data, and providing an interface for the field with various credentialing organizations);
- Prepare OMB clearance package, including: preparing, submitting, and revising (as necessary) an OMB clearance package that will ensure that the evaluation satisfies the requirements of the Paperwork Reduction Act.
- Provide support to the HPB to identify emerging individual and systems issues pertaining to people who are homeless and who have serious mental illness and substance use disorders;
- Synthesize existing knowledge and information (e.g., research, best practices) and disseminate to the service providers, policy makers, and research communities;
- Assist States/Territories and local provider entities to adopt evidence based, exemplary, and promising practices and improve the effective implementation of the PATH program; and,
- Analyze PATH Data and Report Results, including: preparing analytic data files; writing statistical programs; statistically analyzing data; conducting literature searches; writing and editing technical reports and related products; developing written and oral presentation materials; responding to a variety of requests for information with quick turnaround times; providing consultation on statistical and analytic methods; and presenting information about the project to a variety of audiences, both orally and through written materials.

C. General Requirements

1. All reports under this contract shall be produced using Microsoft Word and forwarded to the Government Project Officer (GPO) and Contracting Officer (CO) by e-mail, and one (1) hard copy using USPS rather than a more expensive alternative.
2. Telecommunications Services: The Contractor will be assisted by the GPO in using the appropriate Federal procedures for the initiation and use of the Government mandated FTS-2001 Service. Working with the Contractor, the Division of Operational Support (DOS), in coordination with the Division of Management Systems-Information Technology Team (DMS-IT), will coordinate the installation of the FTS-2001 Service at the Contractor site.
3. **SAMHSA/DMS-IT GUIDELINES:** The Contractor shall use software that meets SAMHSA guidelines. Specifically, the system(s) must be PC-compatible, operate in a Windows environment, and use Microsoft Office Suite (Word; Excel; PowerPoint; and Access), PowerBuilder or other software consistent with SAMHSA/DMS-IT standards. The Contractor shall at all times maintain compliance with current DMS-IT standards, which may change over the duration of this contract. Any deviation from the SAMHSA standard should be negotiated with DMS-IT prior to contract award.
4. **IT Plan:** The Contractor shall prepare an IT Plan that includes the Design, Development, Implementation, and Maintenance for all IT Applications. The IT Plan should include functional requirements (e.g., data, workloads, user interface, reliability, security, and maintenance), technical requirements (e.g., hardware, software, and telecommunications) and operational and other requirements. It should also include major IT milestones and implementation dates of the project. The draft and final IT Plan shall be submitted as a deliverable to the TOO and the DMS-IT for review and approval within one (1) month of the contract effective date (CED).
5. **IT Security Plan:** In compliance with SAMHSA POLICY DMS-IT 02-01-- Establishment of the SAMHSA Automated Information Security Program (AISP)--the Contractor shall prepare an IT Security Plan that includes a control process to ensure that appropriate administrative, physical and technical safeguards are incorporated to all new IT Applications and significant modifications. The Contractor shall comply with the IT Application(s) security requirements needed for the project as set forth in the SOW and applicable portions of the DHHS Automated Information Systems Security Program (AISSP) Handbook. The Contractor further agrees to include this provision in any subcontract awarded pursuant to the prime contract. The draft and final IT Security Plan shall be submitted as a deliverable to the GPO and the DMS-IT for review and approval within one (1) month of the CED.

6. **Adherence to SAMHSA Internet/Web Policy:** The Contractor shall follow all SAMHSA Internet/Website Policy. Any development and production of Internet/Web applications, including Intranets and Extranets, shall comply with SAMHSA policy and procedures. These policies and procedures cover web sites, web page linkages, and web development; and agency programmatic, concept, and technical clearances. All new contracts or modifications to existing contracts involving Internet/web sites shall require Programmatic and Concept Clearance from SAMHSA's Office of Communications (OC) and IT Clearance from the DMS-IT. Any new public web sites created by the Contractor shall become part of the SAMHSA website. Applications development may be accomplished on the Contractor's server. Production versions must reside on the SAMHSA/DMS-IT server.
7. **SAMHSA's Website Privacy Policy:** Each page of the web site, including the front or home page, must include a link to SAMHSA's Website Privacy Policy (found at <http://www.samhsa.gov/about/content/privacy.htm>). DHHS and SAMHSA policy does not allow for persistent cookies on any SAMHSA or SAMHSA-funded web sites. In addition, any forms on the site that will ask users to enter personal information must first be approved through SAMHSA channels.
8. **Internet Site Migration Plan:** The Contractor shall plan for, facilitate, and expedite the migration of all production (as opposed to development) web sites from the Contractor's web site to the SAMHSA web site. The Contractor shall prepare a plan that includes the design, development, implementation, maintenance, and migration from the vendor's web site to the SAMHSA server. The Internet Site Migration Plan should include functional requirements, technical requirements, and operational and other requirements. It should also include major milestones and implementation dates of the project, including the migration phase. The draft and final Internet Site Migration Plan shall be submitted as a deliverable to the GPO and the DMS-IT for review and approval.
9. **Cost Effective Methods:** Throughout this contract, unless otherwise specified, the Contractor is encouraged to use the most cost effective means to access the necessary topical and knowledge application experts to assist in carrying out contract tasks. This includes the use of alternatives to in-person meetings, such as conference calls, teleconferences, faxes, and Internet transmission of materials and receipt of expert input.
10. **Rights in Data:** All data tapes, diskettes, and CD ROM devices, customized computer software, screens, and formats, editing software, software to prepare tables, all other computer tapes, diskettes and records, word and data processing disks, training and/or user manuals, needed to carry out the tasks required under this contract are the property of the Government unless otherwise specified.

11. All reports and materials produced under this project shall be the property of the Federal government, which includes SAMHSA. SAMHSA may utilize, print, or disseminate such material without further charge.
12. **Project Management:** The Contractor is expected to maintain such internal policies and procedures as may be required to ensure the smooth operation of a project of this scope and complexity, including such training materials as may be necessary to introduce new Contractor or subcontractor employees to the project. The Contractor is expected to maintain an internal quality control process that assures that products and reports developed under the contract consistently meet contract objectives. While these policies, procedures, and materials are not deliverables under the contract, the Contractor is expected to make them available for inspection upon the request of the GPO or CO.
13. **All material for the NRCH and the PATH program shall be separated so that all activities in this contract are obviously named and dated as either NRCH or PATH. This contract will have Co-GPO's: One GPO for Tasks 1-8 (NRCH), and another GPO for Task 9 (PATH). Federal staff responsible for monitoring this contract must be able to separate the activities and costs associated with the activities of the PATH program due to legislative constraints of the Stewart B. McKinney Homeless Assistance Act. All PATH work (Task 9) will be directed by the designated GPO for Task 9.**

D. Specific Requirements

The Contractor shall fulfill the objectives of this contract by performing the following tasks:

Task 1.0 Contract Startup

Task 1.1 Startup at Beginning of Contract:

The Contractor shall coordinate an orderly transition of the project from the previous contractor during the time between award of this contract and expiration of the previous contract, for which the final option period is scheduled to end on September 30, 2006.

The Contractor shall:

1. aAt the Contracting Officer's discretion, participate in five (5) or more meetings with the contractor that currently holds the contract for the National Resource and Training Center on Homelessness and Mental Illness to effect a smooth transition and to receive detailed information on the operation.
2. eEnsure receipt from the Contractor or SAMHSA of complete documentation and all government furnished property, the library (the knowledge database), hardware, software, materials and data necessary to support continuation of full services,

capabilities and outstanding technical and related work inherited from the previous Contractor, and promptly notify the GPO of any omissions or deficiencies; and

3. Ensure that, during a three (3)-week transition period, the new Contractor's personnel receive training from the previous Contractor's senior personnel in all system operation and maintenance functions.

Task 1.2 Turnover at End of Contract

The Contractor shall provide, no later than the eighth month of the final performance period, one (1) electronic copy and one (1) hard copy of plans for transfer of the project to the GPO and the CO, as well as the new Contractor. If necessary, the Contractor shall initiate transition activities sixty (60) calendar days prior to the expiration of the contract.

These activities include:

- providing continued full service to the customers of the NRCH;
- at the Contracting Officer's discretion, participating in five (5) or more meetings with the new Contractor to effect a smooth transition and provide detailed information on the operation of the NRCH, as it transitions to the new contractor;
- providing complete documentation and all hardware, software, materials and data produced or acquired (including the library or knowledge database) with contract funds, or under the Contractor's control as Government Furnished Property or Materials, and turn it over to SAMHSA or the new Contractor in good condition;
- during a three (3)-week transition period, the Contractor's senior personnel shall train the new personnel (Contractor or government) in all system operation and maintenance functions; and
- performing appropriate closeout of all outstanding technical and related work.

Unless the underlying data used in the selected study analysis are leased or proprietary, analytic files (where source files are reduced in volume and tailored to specific analyses), data analytic programs and the results produced under the auspices of this project shall be the property of the federal government. If State data are used, the federal government will collaborate with the participating States in planning, carrying out and disseminating the results of such analyses.

All information and materials, including data, developed under this contract are the property of the government and shall be delivered as part of the turnover at the end of the contract. No information developed under this contract shall be released by the Contractor without the written permission of the government.

Task 1.3: Kick-Off Meeting

Within two (2) weeks of the CED, the Contractor and key personnel shall meet with the GPO and other relevant Government staff to discuss the administration of the contract and content of the work plan. The purpose of this meeting is to review and outline the goals, objectives, and anticipated outcomes of the contract activities and to ensure that all activities are responsive to the work plan.

At this first meeting, the Contractor shall submit a draft work plan for conducting all tasks associated with the successful performance of the contract in Year 1.

At a minimum, the work plan must include:

- All proposed activities outlined in Tasks 2-9 below (including staffing plans and timetables);
- A detailed plan for the knowledge database that identifies source materials and describes how materials will be compiled;
- A detailed plan of the arrangements to be completed for the National Training Conference to be held in 2007;
- A detailed plan of the development of curricula and web development;
- A process that assures that products developed and activities funded through the contract will be culturally competent;
- A detailed plan to disseminate exemplary practices;
- Samples of products and a plan marketing the National Resource Center on Homelessness;
- A process for coordinating the work of this contract with other related SAMHSA contracts, including the Chronic Homelessness Initiative TA contract, the Policy Academy on Chronic Homelessness TA contract, and the DSSI's Knowledge Synthesis, Documentation and Marketing contract. This coordination shall include, but not be limited to, sharing of conference plans and distribution of written documents in order to avoid duplication of efforts.

Within two (2) weeks after receiving comments from the GPO, the Contractor shall revise the work plan and re-submit it to the GPO for final review and approval.

Task 1.4: Develop Work Plan for Option Years

Six (6) weeks prior to the contract expiration date, the Contractor shall submit to the GPO a draft work plan for the upcoming option year. The purpose of the work plan is to ensure that it is responsive to the needs of the field during the next option year. Within two (2) weeks after the beginning of the new option year, the Contractor shall meet with the GPO to discuss the work plan. The work plan for the option years shall follow the template of the work plan for the base year. Within two (2) weeks after GPO review of the work plan for that option year, the Contractor shall revise the plan and deliver it to the GPO. The same procedure shall be followed for all subsequent option years of the contract.

Task 1.5: Meetings with GPO

In the first six (6) months of the contract, the Contractor shall participate in weekly meetings (either face-to-face or via conference call) with the GPO and other relevant SAMHSA staff. The GPO will determine the 'mode' of the meeting, including whether all relevant subcontractors (if applicable) are to attend or call in. The purpose of these meetings is to discuss current contract activities, briefly review progress made on completion of contract tasks, and identify and discuss emerging challenges. After the first six (6) months, the Contractor shall participate in bi-weekly meetings at the discretion of the GPO. The Contractor shall coordinate all logistical arrangements for conference calls.

Task 1.6: Biannual Meetings

The Contractor shall participate in meetings every six (6) months with the GPO and other relevant SAMHSA staff, at the discretion of the GPO. The purpose of these meetings is to discuss current contract activities, review progress made on completion of contract tasks, and develop relevant action plans for troubleshooting and emerging challenges.

Task 1.7: Monthly Reports

The Contractor shall submit monthly reports by the 10th day of the following month (e.g., the January Progress Report is due no later than February 10th). If the 10th falls on a weekend or holiday, then the reports shall be due the next business day. The reports must include a summary of activities in the preceding month by task, including web-trend summary statements for the web site, summary of additions to resource database with abstracts, any concerns/problems related to the project, proposed recommendation(s) to address or resolve the problem (or actions already taken to resolve the problem), and work anticipated in the coming months. As a separate and distinct part of each monthly report, the Contractor shall prepare and deliver accurate financial reports of actual and expected expenditures, and a by-name roster of all Contractor personnel assigned to the contract, with labor hour category and unloaded hourly wage/salary rates. The Contractor shall keep the National Resource funds separate from the PATH funds and both shall be reported separately and billed separately in each month.

Task 1.8: Quarterly Budget Report

No later than two (2) weeks following the end of each contract quarter, the Contractor shall submit to the GPO two (2) budget projections: one for the NRCH (Tasks 1-8) and one for PATH (Task 9). These budgets will show the contract amount, the expenditures to date on each task, the categories of those expenditures, the balance remaining, and a projection of how the remaining funds will be spent.

Task 1.9: Annual Reports

Two (2) weeks after the end of each contract year, the Contractor shall submit a draft annual report to the GPO for review and comment. The report must summarize the results of the activities that were conducted during the performance of the contract,

including problems encountered and their solutions. The Annual Report must also include an Annual Budget Report as part of the Final Annual Report summarizing all costs across all quarters of the contract for the contract year. The Contractor shall incorporate any edits from the GPO into the final report. The Contractor shall submit one (1) copy electronically and one (1) hard copy of the final report to the GPO for approval and to the CO, within two (2) weeks after GPO approval of the draft report.

Task 1.10: Final Report

Four (4) weeks prior to the contract expiration date, the Contractor shall submit a draft final report to the GPO for review and comment. The report must summarize the results of the activities that were conducted during the performance of the contract, including problems encountered and their solutions. The report must also include the financial report for the entire contract -- summarizing costs, identifying all subcontractors, and a summary (by task) of costs per year and cumulatively. The Contractor shall incorporate any edits from the GPO into the final report. The Contractor shall submit one (1) electronic and one (1) hard copy of the draft and final report to the GPO for approval and to the CO, within two (2) weeks after GPO approval of the draft report.

Task 1.11: Annual Advisory Steering Committee Meeting

The Contractor shall convene an advisory steering committee composed of Federal, state, private and consumer representation with expertise and interests in the Homelessness arena. The committee fosters communication and collaboration among the Federal Agencies in collaboration with private sector organizations, and consumer groups.

Task 1.11.1 Advisory Steering Committee Membership

Advisory Steering Committee Membership is structured to ensure the inclusion of the viewpoints of those populations, and the families who have experienced homelessness. Membership will be at the discretion of the GPO, and may include representatives from the following Federal Agencies: Assistant Secretary for Planning and Evaluation (ASPE); Health Resources and Services Administration (HRSA); Department of Housing and Urban Development (HUD); the Veterans Administration (VA); the Department of Labor (DOL); the Administration for Children and Families (ACF); and may include the Centers for Medicare and Medicaid Services (CMS). Additional membership may include the National Council of Homeless Vets (NCHV); National Trauma Center (NTC); SAMHSA's Center for Substance Abuse Treatment (CSAT); at least two (2) State representatives who attended a Policy Academy; Consumer representation; one (1) Path State contact; and at least one (1) PATH sub-recipient. It is expected that membership will be approximately 15 members and may include representation from the research on homelessness community. It is estimated that membership will revolve for those States and private organizations and last approximately two (2) years. The Contractor shall be responsible for the logistics of the meetings of the committee (to meet at least once per year). The work of the first Advisory Steering Committee shall be to propose a strategic plan for the NRCH and shall focus on the implementation of States' 10-year Strategic Plans to end chronic homelessness. It is expected that this meeting will be approximately

two (2) days. This meeting shall occur between 6-8 months after the CED.

Task 1.12: Development of Marketing Plan and Associated Products

The Contractor shall develop a marketing plan and associated materials to inform the field and other interested public and private entities of the NRCH. Products must include a brochure and rolodex card highlighting the work of the NRCH. Samples should be brought to the kickoff meeting, two (2) weeks after the CED.

Task 2: Maintain Library Knowledge Database

The Contractor shall collect and maintain a resource library of published studies, reports (including those generated under this contract), program descriptions, abstracts, and other related web-based and media materials. The library shall be passed to the Contractor as part of the closeout/transition process from the previous contractor, and meet the following specifications:

- Include coverage of the current period (i.e., produced/published within the past 2 months) and at least 10 years of prior published work;
- Include seminal documents/resources in the field, regardless of age;
- Address the topics of service delivery, supports (e.g., housing, income & entitlements, health, employment), epidemiology, research, evaluation, measurement issues, prevention, and community perspectives related to homelessness, mental illnesses, and co-occurring substance abuse disorders;
- Contain training materials, curricula, resource guides, and multi-media products in addition to journal articles, books, or popular press, etc.;
- Embrace the range of homeless subpopulations including children; youth; single adults; families; older adults; veterans; ethnic, migrant and immigrant populations; those individuals who are homeless with cognitive or mental impairment and persons experiencing chronic/long-term homelessness; and
- Be searchable by key words and accessible on the NRCH website.

Task 3: Update and Develop Annotated Bibliographies

The Contractor shall develop bibliographies, in conjunction with the development of policy papers and technical reports, as directed by the GPO. Following GPO approval, the Contractor shall proceed with preparation of the annotated bibliographies and submit them to the GPO for approval prior to disseminating them. Upon approval by the GPO, the bibliographies shall be added to the Knowledge Database. The Contractor shall make the bibliographies available through the NRCH website, and update them annually.

Task 4: Maintain a Website on Homelessness

The Contractor shall update the current website and assure the continuous maintenance, operation, evolution and enhancements of the existing website while the site is being updated. The goal of this website is to provide easy access to mental health and substance abuse information resources, provide for distance education applications, and link to other vital web sites of interest as it pertains to homelessness. The Contractor shall conduct a usability test of the updated website using the processes outlined by renowned web expert Jakob Nielsen. The Contractor shall submit a usability testing report to the GPO four (4) weeks before the site is to migrate to the SAMHSA server and go live. The Contractor shall make all changes, or provide a cogent argument for why the changes would be disadvantageous to the effort. Usability shall include a review of the navigation, reading level, language, aesthetics, accurate readability and a review of any applets, animation or graphics or other live linked material. The Contractor shall maintain a web-trends review of the site.

The Contractor shall also assure that the website is modified, as necessary, to reflect the addition of new products, programs and services. The Contractor shall update the website (e.g., out of date items removed) at least monthly.

Task 4.1: Maintain Website

Currently, basic services are being maintained within the SAMHSA Internet site www.nrchmi.samhsa.gov. The Contractor shall request the domain name www.nrch.samhsa.gov, and shall upgrade material and continue to maintain the website, including, but not limited to:

- Development of new content areas in support of SAMHSA programs and activities, including relevant SAMHSA grants announcements;
- Development of processes for posting print resources (producing files in multiple formats, e.g., HTML and PDF);
- Development and maintenance of a searchable SAMHSA calendar of events that includes all homeless, mental health, and substance abuse prevention and treatment conferences, meetings, and activities in the United States;
- Preparation and maintenance of online resources, including HTML coding of SAMHSA/HPB-produced documents;
- Development and maintenance of electronic forums for SAMHSA/HPB;
- Establishment of linkages with other relevant homeless information websites;
- Provision of a system of inquiry response and user feedback;
- Development and maintenance a tracking system to monitor usage of the website;
- Establishment of workforce development through the use of distance education with CEU credits sought through various organizations of interest to the homeless services workforce; and,
- Incorporation of consistent site design, graphics, use of color, and page length.

By the sixth week of the contract, the Contractor shall submit to the GPO a draft annual development and maintenance plan for the website. The GPO will provide comments within two (2) weeks. The Contractor shall finalize the plan within two (2) weeks of receipt of the GPO's comments. By the third week of each option year of the contract,

the Contractor shall submit to the GPO a draft annual development and maintenance plan for the NRCH website. The GPO will provide comments within two (2) weeks. The Contractor shall finalize the plan within two (2) weeks of receipt of the GPO's comments.

For each year of the contract, implementation of the finalized plan shall begin immediately upon GPO approval. The SAMHSA Office of Communication and Internet Technology office shall be consulted regarding the development and review of the annual plans for the web site.

Task 4.2: On-line Security

The Contractor shall coordinate with the SAMHSA Information Systems Security Officer and the SAMHSA Network Contractor to ensure that SAMHSA security requirements are satisfied in concert with overall data and LAN security measures. The Contractor shall maintain the security of the systems – including prevention of unauthorized access and alteration of the data – and provide backup of the entire system and any other systems developed in support of this contract in order to enable disaster recovery in case of catastrophic loss of data through hardware malfunctions or by external causes (natural and man-made). All media used for disaster recovery (i.e., tapes, CDs) are the property of the Government.

Task 5: Publication Clearance: Policy Papers, Reports

The Contractor, as directed by the GPO, shall be responsible for developing a series of overview papers and technical reports which summarize and synthesize the knowledge base on specific topics and make recommendations that support effective service delivery systems. The Contractor shall also be responsible for completing the publication clearance forms on these products, if deemed necessary by the GPO.

The Contractor shall apply DHHS and SAMHSA communication policies and procedures [see *Communications Planning and Clearance Processes Guidelines*, January, 2006, document to be given to Contractor at kickoff meeting] to the development and writing of publication clearance forms. This involves working with the GPO in developing and writing clearance requests for products being developed under this contract. The Contractor shall ensure that clearance documents, particularly concept clearance justifications (HHS 615, line 9), are complete and contain information that is concise and appropriate.

Clearance forms shall be circulated for clearance at CMHS/SAMHSA via the GPO and/or the Center Publication Coordinator. Upon receipt of final content clearance approval from DHHS, the Contractor shall assist the GPO, and/or other designated CMHS staff as directed, in expediting the printing of all HPB publications. GPO requests to the Contractor for this requirement may include, but are not limited to: preparation of printing specifications; completion of the Printing and Visual Services form (HHS-26) with all necessary information; review of book blues and color match prints from printers to ensure they meet Government Printing Office printing requirements; and coordination of the dissemination of printed products with the appropriate clearinghouse and/or recipients.

The Contractor shall collaborate with the DSSI product development and dissemination contractor to ensure the highest quality product available and the non-duplication of material by either public or private entities. The Contractor shall ensure the smooth marketing and dissemination of material developed under this and other entities as approved by the GPO.

Task 6: Develop Policy Papers, Manuals, Curricula, Reports and Other Materials

During the Base Year of the contract, and Option Years 2 and 4, as directed by the GPO, the Contractor shall develop no more than two (2) papers, technical reports, manuals or curricula. During Option Year 1 and Option Year 3, the Contractor shall develop no more than four (4) of these products. Examples of topics include the interface of homelessness with the criminal justice system; treatment of mental illness and co-occurring disorders; services for children and youth; individuals who are homeless and who have cognitive and mental impairments; trauma recovery services; effective service models for homeless mothers with dependent children; and rural homelessness. Through discussions with the GPO and relevant SAMHSA staff, the Contractor shall identify the appropriate topics to be explored and target audience. All topics under consideration shall be submitted to the GPO for approval.

It may be necessary to seat an expert panel to address emerging issues on homelessness, especially if there is scant research available on the topic. The need for an expert panel shall be at the discretion of the GPO and shall not exceed more than two (2) in any given contract year.

Within four (4) weeks after the CED, the Contractor shall provide to the GPO a specific plan that minimally covers, for each proposed paper/report:

- The topics for the paper/report;
- A rationale for why SAMHSA/HPB needs to have a paper/report on this topic;
- A description of a proposed approach to the synthesis (e.g., review of existing literature, expert panel); and
- A management time line for completion and proposed budget.

The Contractor shall follow the same procedure for this task in Option Years 1 and 3.

The Contractor shall develop a Homeless Trauma Informed Toolkit. This toolkit shall be a systematic adaptation of the Trauma Informed Training Curriculum already successfully developed by the National Technical Assistance Center (NTAC), via SAMHSA contract with NASMHPD for use with State mental health authorities. The planned adaptations for the new Homeless Curriculum [see **Task 7.2 below**] is for providers of mental health services in homeless program settings (an outline has already been developed). This project shall continue to be developed by NTAC, under the guidance of SAMHSA/CMHS staff.

NOTE: For budgeting purposes, offerors should assume that each paper or report shall

not exceed 30 pages in length and that each manual/curriculum shall not exceed 60 pages. Offerors should also assume that there will be no more than two (2) expert panels in each of Option Years 1 and 3. At the discretion of the GPO, not more than two (2) expert panels shall be seated/year and each panel shall include no more than seven (7) experts. The expert panel must be approved in advance by the GPO. The meetings shall be held in a location less expensive than Washington, DC, and shall be no longer than 1.5 days. Consultants in the expert panel are eligible to receive travel, per diem, and honoraria, not to exceed \$450/day.

Task 7: Provide Technical Assistance and Training Support

The Contractor shall provide TA and training, as directed by the GPO, which may include training to enhance the adoption of evidence-based practices and infrastructure development. Most of the TA shall be provided by disseminating information from the NRCH. The Contractor shall provide TA through phone calls, e-mails, workshops, and trainings. All trainings that require travel must be reviewed by the GPO in advance. The Contractor shall organize regional trainings and workshops as well as sponsor trainings that are conducted as part of national conferences, as directed by the GPO.

NOTE: CMHS is in the final stages of implementing a web-based Government Performance and Results Acts (GPRA) data reporting and collection system called Transformation Accountability (TRAC). One function of this system is the monitoring of all CMHS TA requests in addition to the training outcome. The Contractor shall be required to enter all TA requests in the TRAC and use standardized TA customer surveys for feedback on the following aspects of the training:

- Process: Recipient demographics; satisfaction with services and/or materials received; accessibility of services and/or materials received.
- Content: Recipients' perception of the relevance, helpfulness, and understandability of the services and/or materials received.
- Impact: Recipients' report of what was learned; intent to do something differently as a result of services and/or materials received.

These forms will be made available to the Contractor as soon as OMB clearance is obtained in early FY 2007.

Task 7.1: Respond to Requests for Information

The Contractor will receive, and shall respond to, requests for information on homelessness from the public. No general public or SAMHSA grantee shall be charged for duplication, handling or postage when requesting information from the clearinghouse. The Contractor shall submit, as part of the monthly reports, a summary detailing the types, number, and subject matter of information requests.

Task 7.2: Conduct Regional Workshops

The Contractor shall conduct workshops and trainings on topics to be decided by the GPO. For example, one topic includes SAMHSA's *Blueprint for Change: Ending Chronic Homelessness for Persons with Serious Mental Illnesses and/or Co-Occurring Substance Use Disorders*. This is a tool used to disseminate state-of-the-art information about ending homelessness for people who have serious mental illnesses, including those with co-occurring substance use disorders. The *Blueprint for Change* reviews current and past research and offers practical advice on how to plan, organize, and sustain a comprehensive, integrated system of care designed to end homelessness for people with serious mental illnesses and/or co-occurring substance use disorders.

The Contractor shall provide no more than two (2) regional workshops on the *Blueprint for Change* in each year of the contract. These workshops can be embedded in conferences or as stand-alone events, and will be determined by the GPO.

The Contractor shall support the development of a training of trainers manual on trauma and homelessness, with the guidance of the GPO and knowledgeable Federal staff. The Contractor shall conduct at least two (2) trainings per contract year on this topic. The Homeless Curriculum shall include a day-and-a-half "Train the Trainer" module for selected homeless program personnel from different levels of homeless organizations [see **Task 6**]. This will enable these individuals to return to their settings and begin to perform training and implementation of trauma informed systems and practices with program staff and consumers. The basic outline has been completed and this task shall be conducted under the guidance of designated SAMHSA/CMHS staff.

NOTE: For budget purposes, offerors should assume that each workshop will have 50 people in attendance for 1.5 days, and that the workshops will be conducted by two (2) trainers and a meeting logistics coordinator. In the Base Year and Option Years 2 and 4, the workshops shall be held on the east coast, or one (1) workshop in the midwest and one on the west coast. In Option years 1 and 3, the Contractor shall assume that the workshops will be held on the west coast. Participants will be expected to pay for their own travel.

Task 7.3: Provide Other Trainings and Technical Assistance Workshops

The Contractor shall provide trainings annually that shall be embedded in conferences held by national and/or regional organizations and associations, such as the American Public Health Association, American Psychological Association, American Psychiatric Association [pre-conference training on Homelessness], National Association of Social Workers, National Alliance to End Homelessness, and the National Alliance of the Mentally Ill.

For the other trainings, the Contractor shall recommend potential training topics, which could include:

- Evidence based and promising treatment practices;
- Supportive housing;
- Cultural competence service delivery models;
- Developing partnerships; and
- Strategic planning.

The Contractor shall develop a list of training consultants who are diverse in ethnicity and who have expertise in the topic areas. This list of proposed consultants shall be available for the GPO at the kickoff meeting to be held within 2 weeks after the CED. The Contractor shall make all logistical arrangements for the trainings and provide relevant material and trainers. The Contractor shall consult with the GPO and representative from the host organization to develop the agenda and list of presenters for each training.

All of the trainings must include a consumer perspective, and homeless or previously homeless consumers shall be included on panels or in presentations as appropriate. The Contractor shall be responsible for recruiting presenters as well as for conference logistics as it relates to the training.

Within four (4) weeks after each training, the Contractor shall submit to the GPO a report summarizing the evaluation of the training.

The Contractor shall have up to two (2) trainers/presenters at each training. The Contractor shall be responsible for reimbursement of travel, per diem, and honoraria costs for trainers/presenters.

NOTE: For budget purposes, offerors should assume that four (4) trainings will be held in Option Years 1, 3 and 4, and one (1) training will be held in the Base Year and Option Year 2. In addition to the above trainings, CMHS has supported a training at the American Psychiatric Association to be held at their annual meeting and conducted by a psychiatrist who trains other medical personnel interested in treating persons who are homeless. Offerors should also include that annual training in their proposed budgets.

Task 8: Plan and Conduct SAMHSA's National Training Conference

The Contractor shall plan and host the national training conference in the Base Year, Option Year 2 and Option Year 4 of the contract. The Contractor shall make all logistical arrangements for the conference, staff the conference, provide relevant material, and develop proceedings.

- The conference must focus on promoting evidence-based and promising practices for providing housing, treatment, and supports to people who are homeless and have mental illnesses and/or substance use disorders.
- Homeless or previously homeless consumers shall be included as presenters throughout the conference.

- The conference shall include full-day, half-day, and 75-90 minute training sessions, in addition to one (1) opening keynote session. Other conference activities should include a resource area, exemplary program awards ceremony (which may be part of the opening plenary), and tours to local program sites.
- The conference may include a one-day pre-conference institute to address specific issues related to ending chronic homelessness and embedding cultural competency into delivery systems.
- The conference must be at least 2.5 days in duration. The Contractor shall plan for up to 800 participants and shall be responsible for all of the meeting planning tasks and contacts as well as the conference logistics, including locating hotels that are Americans with Disabilities Act (ADA)-accessible, and reimbursement of travel and per diem costs.
- The Contractor shall pay travel, per diem and lodging, and honoraria for up to 50 presenters. There shall also be presenters selected at no cost to the contract that include Federal, state and local officials, and other experts.

For the base year of the contract, the following activities will have already occurred and shall be continued by the new Contractor:

- The Contractor shall honor the contractual arrangements for the hotel site selected under the previous Contractor.
- The Contractor shall be responsible for providing 15 consumer scholarships to attend the National Training Conference and should include transportation, per diem and lodging for the 2.5-day Conference.

Task 8.1: Develop Specific Work Plan for the National Conference

Within four (4) weeks after the CED, the Contractor shall meet with the GPO to review a work plan specifically for the national conference. The work plan shall include a budget estimate, timeline, and proposed list of planning committee members. Additionally, the Contractor shall:

Task 8.1.1 Develop Workshop Topics/Tracks

- Identify key leaders for workshop development
- Develop content forms for each workshop
- Finalize content of workshops and pre-conference institutes

Task 8.1.2 Determine Faculty and Agenda

- Select and contact speakers
- Develop and mail speaker packets
- Coordinate hotel/travel arrangements for speakers to include consultant forms/travel vouchers
- Identify and arrange for keynote speakers, receptions, site tours
- Finalize number and length of training sessions

Task 8.1.3 Plan for Materials and Printing

- Develop schedule for brochures
- Establish conference theme
- Create and mail “save the date” postcard
- Determine artwork for poster, brochure, folder
- Develop mailing list
- Develop and mail conference brochure
- Draft conference program
- Print program and folder
- Identify materials for resource binder
- Create signage
- Assemble folders to be shipped to hotel

Task 8.1.4 Coordinate hotel logistics

- Conduct hotel site visit and identify primary contact at hotel
- Finalize schedule with hotel
- Finalize sleeping room list
- Confirm catering, AV, room set-up
- Coordinate shipping with hotel

Task 8.1.5 Registration

- Develop on-line registration form for brochure
- Develop conference registration database
- Respond to phone/e-mail inquiries
- Enter data, mail confirmations, process payments
- Create participant list, nametags, etc.

Task 8.1.6 Continuing Education Units (CEU)

- Identify credit-granting associations
- Develop evaluation forms for each training session and the overall conference
- Submit applications
- Create and assemble Continuing Medical Education (CME)/CEU information sheet

Task 8.1.7 Consumer scholarships

- Announce scholarship availability
- Respond to information, collect applications
- Review, select and notify recipients (approximately 30)
- Coordinate registration, hotel and travel for recipients

Task 8.1.8 Resource Room

- Identify organizations to provide materials
- Contact organizations/provide shipping instructions for materials
- Create map/plan for room display

Task 8.1.9 Site Tours in the Host City

- Select programs to feature
- Confirm sites
- Arrange for transportation
- Create sign up sheets and tickets

Task 8.1.10 Conduct Conference

- Finalize conference staffing
- Set up on-site, including resource room
- Staff conference

Task 8.2: Conduct Planning Meeting

Within eight (8) weeks after the CED, the Contractor shall conduct a one (1)-day planning meeting. The purpose of the meeting shall be to develop various conference tracks and identify potential speakers. The Contractor shall recommend to the GPO the names of people to be considered for this planning committee. Upon approval of the GPO, the Contractor shall contact these people and invite them to participate in the planning meeting. The Contractor shall be responsible for organizing the logistics for this meeting.

Within three (3) weeks after the meeting, the Contractor shall submit to the GPO a report that summarizes the results of the planning meeting.

Task 8.3: Complete Follow-up Activities

The Contractor shall be responsible for processing CME/CEU applications and mailing certificates; writing a summary report for submittal to the GPO; sending thank-you letters; sending evaluation results to speakers; reconciling costs; and paying invoices. Within six (6) weeks after the conference, the Contractor shall meet with the GPO for a debriefing session to discuss the evaluations (overall and individual sessions).

Task 9: Conduct PATH-Related Activities**Task 9.1: Review Plan of Performance**

Task 9.1.1: Within two (2) weeks after the CED, the Contractor shall meet with the designated GPO for this Task to review the plan submitted in their proposal for performance of the PATH-related activities and deliverables. The purpose of this meeting is to review and outline the goals, objectives, and anticipated outcomes of Task 9 activities and to ensure that all activities are responsive to the information and TA needs of the State agencies responsible for the administration of the PATH program. The Contractor and GPO shall discuss any needed modifications or changes to the plan of performance submitted.

At a minimum, the plan of performance must describe:

- All proposed activities outlined in sub-tasks, below, including staffing plans and timetables;
- Strategies to maximize involvement of Task 9 activities by representatives of State/Territorial mental health authorities;
- Strategies to provide opportunities for involvement from consumers of PATH services;
- The system by which Task 9 will be coordinated with other tasks of this contract and with other SAMHSA contracts. The plan of performance for Task 9 must also include a discussion of the mechanisms proposed for coordination with TA centers funded by CMHS. This coordination shall include sharing of any conference plans and distribution of written documents, in order to avoid duplication of effort.

Task 9.1.2: Within two (2) weeks after receiving GPO approval, the Contractor shall revise the plan of performance for Task 9 to incorporate comments received from the GPO and re-submit to the GPO for final review and approval.

Task 9.1.3: Within 48 weeks after the start of each contract year, except for the fifth year, the Contractor shall submit to the GPO a draft revised Plan of Performance for Task 9 activities during the subsequent year. The purpose of the revised Task 9 plan is to ensure that these activities are responsive to the information needs of the States during the subsequent year.

Task 9.1.4: Within two (2) weeks after GPO review of the revised plan of performance, the Contractor shall revise this Task 9 plan – incorporating the GPO’s comments – and deliver the revised plan to the GPO.

Task 9.2: Provide Technical Assistance for States

The Contractor shall plan and conduct standard and intensive TA for selected States, or regional groups of States, in order to provide programmatic support to PATH State projects and local provider organizations. The TA, especially training, may be directed to persons who will use the training to improve their role in service delivery, or, as part of a train-the-trainer strategy, it may be directed to persons who, in turn, will train others who have a more direct role in service delivery.

The Contractor shall conduct up to five (5) standard and three (3) intensive TA events during each contract year. The Contractor shall obtain approval from the GPO prior to finalizing the selection of States to receive TA. The Contractor shall propose national experts, hired on a consultant basis (or, in some cases, staff) to conduct such events and shall obtain GPO approval of the consultants (or staff) to provide such assistance, and the agenda for any event. The Contractor shall also identify any training materials developed by PATH-funded or other sources and include or adapt these (if feasible) for purposes of

the event.

The Contractor shall assist the host State in any logistical arrangements for a TA event, including obtaining meeting space and securing expert consultants. The Contractor shall encourage requests for standard training jointly from two (2) or more States and shall ensure that invitations to attend training are sent to other States. The Contractor shall ensure that a description of any planned training is sent to all participants to provide advanced notice of what any training will cover. The Contractor shall initiate and conduct a conference call with the host State to allow for preparation of the program agenda. Included also in any pre-visit planning shall be discussions with some of the participants to determine their expectations and level of knowledge in the training issue.

Each standard TA event is expected to be approximately two (2) days in duration, but may differ, with approval of the GPO. The role of the Contractor shall include presenting any training curricula, facilitating discussion, and responding to questions.

The Contractor shall provide travel, per diem, and honoraria for up to 75 expert consultants. As deemed practical, the Contractor shall arrange with the host State for the meetings to be held in State office space or in local provider facilities. Costs for meeting space rental and other related costs shall be the responsibility of the Contractor.

Task 9.2.1: The Contractor shall develop a system for selecting States to receive TA. The plan shall be submitted to the GPO for review and approval, four (4) weeks after the beginning of each contract year. The system must include a mechanism for States to request TA, as well as a means for the GPO to identify States for TA.

Task 9.2.2: By 10 weeks after the beginning of each contract year, the Contractor shall provide to the GPO for approval a list of suggested States to receive such TA and a schedule of proposed assistance for each year of the contract.

In addition to standard TA, by 10 weeks after the start of each contract year, the Contractor shall identify at least one (1) State to receive intensive TA to implement a specified innovation in delivery of services to persons who are homeless and have serious mental illnesses. Following GPO approval, the Contractor shall conduct interviews with no more than nine (9) key stakeholders, persons who would benefit from, and persons who would adopt the innovation, to determine the extent of consensus to adopt the innovation. The Contractor shall identify expected outcomes, provide TA through workshops, and on-site and telephone-based targeted TA. The Contractor shall also assess the extent to which their efforts achieved objectives.

Task 9.2.3: By 50 weeks after the beginning of each contract year, the Contractor shall submit a list of suggested States to receive on-site assistance during the following year.

Task 9.2.4: Within two (2) weeks following GPO approval of the proposed events, the Contractor shall begin scheduling this TA.

Task 9.2.5: Prepare and Submit Reports on TA events – The Contractor shall prepare and submit to the GPO a report following each TA event within three (3) weeks of the event. At a minimum, the report must be a 1-2 page summary of the TA event which includes a description of the objective(s) and focus of the event, a copy of the agenda, a listing of all participants, and copies of any handouts or material distributed to participants.

Task 9.3: Plan and Host Meetings of State PATH Contacts

The Contractor shall plan and host two (2) meetings of State PATH Contacts in Year 2 and Year 4. As described below, the Contractor shall make all logistical arrangements for the meetings, facilitate each meeting, present relevant material, and develop proceedings. The Contractor shall consult with the GPO, State PATH Contacts, and others in developing the agenda and list of presenters for each meeting.

The meetings must focus primarily on providing information and assistance to States and must address the adoption of exemplary practices and ongoing information and programmatic support needs of State PATH Contacts. The agenda for the meetings must include a consumer perspective, and homeless or previously homeless consumers shall be included on panels or in presentations, as deemed appropriate by the GPO.

Each meeting must be between 2 and 2½ days in duration and shall be held at a location approved by the GPO, most likely in the Washington D.C., area. The Contractor shall be responsible for all meeting logistics, including locating hotels and reimbursement of travel and per diem costs for each of the 56 State PATH Contacts, or an alternate from their State. The Contractor shall pay travel, per diem, and honoraria for up to 30 paid presenters. There shall also be presenters selected at no cost to the contract among meeting attendees, Federal and local officials, and others.

Task 9.3.1: By 18 weeks after the start of Year 2 and Year 4 of the contract, the Contractor shall draft and submit to the GPO a draft agenda and presenter list for that year's meeting.

Task 9.3.2: By Week 22 of Year 2 and Year 4 of the contract, the Contractor shall revise the agenda and participant list to incorporate GPO comments and re-submit them to the GPO for final review and approval.

Task 9.3.3: The final conference agenda shall be submitted to the GPO by Week 24 of Year 2 and Year 4 of the contract.

Task 9.3.4: Within three (3) weeks following the conference, the Contractor shall provide an evaluation of the conference, overall and for each of its sessions.

Task 9.4: Collect, Analyze and Summarize PATH Program Data

The States and the local agencies to which they provide PATH funds submit data (see Appendix) to the Government on services provided with PATH funds and persons who received these services. The Contractor shall obtain such data for each fiscal year of the contract, beginning with FY 2007, through an existing Internet-based data collection system. The data system permits local PATH-funded providers to enter and revise annual data, on-line, and permits State PATH Contacts to review the data and certify their accuracy.

The Contractor shall maintain and adjust that system, as needed, to incorporate any changes in: (1) data elements, (2) instructions to agencies entering the data, and (3) data cleaning procedures. The Contractor shall also: (1) prepare and distribute a handbook each year to the 56 State PATH Contacts and more than 400 local PATH-funded projects regarding data entry procedures; and (2) provide individualized data entry assistance, as needed, to PATH-funded State and local programs.

NOTE: CMHS is in the final stages of implementing a web-based GPRA data reporting and collection system called Transformation Accountability (TRAC). The implementation of this system will necessitate changes in the Contractor's collection of PATH GPRA data at some point during the early years of this contract. Collection of PATH GPRA data by TRAC shall occur either through periodic electronic data transfer of GPRA data from with the existing PATH data collection system, or by carving out the GRPA data collection from the current system that the TRAC will then collect. The Contractor will be kept apprised on the status of GPRA data collection requirements as they are finalized.

Task 9.4.1: The Contractor shall provide instructions to State PATH Contacts and providers no later than June 30th of each contract year.

Task 9.4.2: No changes may be made to the PATH Annual Report forms without prior approval from the Federal Office of Management and Budget (OMB). The PATH Annual Report forms are approved by OMB. The Contractor shall prepare any packages in draft form, required for such approval. The package must include an assessment of the burden entailed in collecting the data and respond to questions regarding its use. The next complete package will be due in 2009 and is expected to be approved for a 3-year period.

Task 9.4.3: Two (2) weeks following GPO approval of an OMB package, the Contractor shall prepare a final copy of the package.

Task 9.4.4: By no later than 12 weeks following the due date for the States' submission of annual report data (currently January 31), the Contractor shall provide the GPO with a draft of the data tables and shall identify any issues concerning the quality of the data.

Task 9.4.5: The Contractor shall submit a final version of the data tables by no later than two (2) weeks following GPO approval.

Task 9.4.6: Preparation of Program Summary

On an annual basis, the Contractor shall prepare, format and print a summary of the PATH program, nationwide. The report must summarize the most recent key data submitted by the States, include a 1-page fact sheet, and describe the activities of the PATH program. The report should be approximately six (6) pages in length and must provide background information about the PATH program and describe its initiatives, priorities and accomplishments. Each program year, the Contractor shall provide a draft of the PATH summary to the GPO by no later than April 1st.

Task 9.4.7: The Contractor shall provide a final copy of the PATH summary within two (2) weeks following GPO approval.

Task 9.5: Provide Technical Support for Field-Generated Program Assistance

NOTE: CMHS is the final stages of implementing the web-based GPRA data reporting and collection system called TRAC. One function of this system is the monitoring of all CMHS TA requests in addition to the training outcome. The Contractor shall be required to enter all TA requests in the TRAC and use standardized TA customer surveys for feedback on the following aspects of the training:

- Process: Recipient demographics; satisfaction with services and/or materials received; accessibility of services and/or materials received.
- Content: Recipients' perception of the relevance, helpfulness, and understandability of the services and/or materials received.
- Impact: Recipients' report of what was learned; intent to do something differently as a result of services and/or materials received.

These forms will be made available to the Contractor as soon as OMB clearance is obtained in early FY 2007.

Task 9.5.1: Technical Assistance on National Topics through Telephone Conference Calls

The Contractor shall plan, host or provide assistance for, up to five (5) multi-presenter telephone conference calls during each contract year. These conference calls shall be directed toward topics of national interest. Examples of such topics include funding for affordable housing, job development, and development of outcome measures and interventions for co-occurring disorders.

Task 9.5.1.1: With input from the GPO and consultation with State PATH Contacts, the Contractor shall identify and submit for GPO approval a list of proposed topics and suggested speakers at least four (4) weeks prior to the proposed telephone call.

Task 9.5.1.2: The Contractor shall notify State PATH Contacts and other potential TA recipients of the telephone calls at least three (3) weeks prior to the date scheduled for the call. The Contractor shall distribute and post a slide accompaniment and any other related material on the Internet.

Task 9.5.1.3: The Contractor shall provide the GPO with a written evaluation of each telephone conference call by no later than three (3) weeks after the event.

Task 9.5.1.4: The Contractor shall host the telephone conference call, arrange for participants to telephone in, broadcast the presentations on the Internet, and post an archived replay of the presentations on the Internet. The Contractor shall also prepare an edited transcript of the presentations and, following review by the GPO, post the transcript on the Internet by no later than four (4) weeks following the conference call.

Task 9.5.2: Technical Support to Issue Development Groups of State PATH Contacts and Local Providers

The Contractor shall provide support to conduct telephone meetings for up to three (3) issue development groups for each contract year during the contract performance period. The working groups must comprise approximately 6-8 participants, consisting primarily of State PATH Contacts.

The Contractor shall provide technical support in arranging meetings, taking minutes, and preparing summaries. The meetings shall be conducted by telephone conference call. The Contractor shall suggest, from its own databases or from other knowledgeable organizations, consultants to participate in the discussions, provide advice, and prepare documents. Through consultants and its own staff, the Contractor shall prepare discussion papers that describe current practices of States and local PATH-funded providers and analyze the information obtained.

Task 9.5.2.1: By no later than Week 8 of each contract year, after consulting with State PATH Contacts, the Contractor shall recommend for GPO approval a list of issues suitable for deliberation by an issue development group,

Task 9.5.2.2: By no later than 14 weeks following the convening of each issue group, the Contractor shall prepare a draft report for review by the group and the GPO.

Task 9.5.2.3: By no later than four (4) weeks after preparation of each draft report, the Contractor shall write a final report incorporating revisions suggested by the working group and the GPO.

Task 9.5.2.4: By no later than two (2) weeks after receiving the PATH-GPO approval, the Contractor shall mail to State PATH Contacts and PATH-funded providers: (1) information obtained, (2) the final report, and (3) any documents prepared by the working groups. Reports should average about 15 pages.

Task 9.5.3: Mentoring Program

The Contractor shall establish a mentoring program for new State PATH Contacts. The Contractor shall: (1) contact each new State PATH Contact following the new Contact's appointment; (2) send the new Contact an orientation package; and (3) encourage the new Contact to hold periodic telephone briefings with another State PATH Contact who will serve as a mentor. The Contractor shall: (1) locate a mentor for each participating new State PATH Contact; (2) outline the mentor's expected role; and (3) conduct follow-up

meetings with the new State PATH Contact and mentor to ensure that the arrangement is working satisfactorily. The Contractor shall also host teleconferences of mentors and persons being mentored to discuss the mentoring experience and topics of special interest to new State PATH Contacts.

Task 9.5.3.1: The Contractor shall: (1) contact each new State PATH Contact within three (3) weeks following the new Contact's appointment.

Task 9.5.3.2: The Contractor shall conduct follow-up meetings with the new State PATH Contact and mentor within three (3) weeks following their agreement to participate in the mentoring program.

Task 9.5.3.3: The Contractor shall host quarterly teleconferences of mentors and persons being mentored.

Task 9.5.4: Internet-based Activities

The Contractor shall develop and maintain -- within the SAMHSA Internet site -- PATH Web pages, to include, but not be limited to:

- A data entry system for the collection of PATH data (See Task 9.4)
- Documents, Powerpoint presentations
- Audio and video live streaming and archived programming from SAMHSA and other sources.
- Graphics material
- SAMHSA grant announcements
- A tracking system to monitor usage of the web
- Linkages to other web sites
- Development of web pages for specialized materials or for specialized audiences

Note: The primary audience of the PATH web pages is State PATH Contacts and staff of PATH-funded and similar organizations. The PATH web pages can be accessed at www.pathprogram.samhsa.gov.

Task 9.5.4.1: IT Plans

Task 9.5.4.1.1: The Contractor shall submit a draft IT Security Plan within one (1) month after the CED.

Task 9.5.4.1.2: The Contractor shall submit a final IT Security Plan within two (2) weeks after DMS-IT approval.

Task 9.5.4.2: State Innovations/Transformations Web Page

The Contractor shall develop a State Innovations Web page that includes a multi-media presentation of exemplary practices being conducted by the States. The Contractor shall prepare up to three (3) such State presentations during each year of the contract. The Contractor shall conduct the following activities:

- Propose a process for highlighting innovative practices and recommend selected practices.
- Revise a Transformation/Innovation section of the PATH Web page for the posting of all audio, video, and text-based materials.
- Recommend innovations to be selected.
- Create an audio/video photographic presentation and a 3-to-5 page text summary of the innovative practice for posting on the PATH web page.
- Provide announcements for each State Innovation posted on the PATH web site.
- Create and monitor a State Innovations bulletin board discussion on the PATH web site.

Task 9.5.4.2.1: By Week 9 of each contract year, the Contractor shall solicit input from State PATH Contacts and PATH-funded programs and propose innovations and topic areas to PATH Program Staff to be featured on the PATH Web site.

Task 9.5.4.2.2: By Week 15 of each contract year, the Contractor shall provide for approval of PATH Program Staff, Web-based information about innovative programs, for posting to the PATH web site.

Task 9.5.4.2.3: Within three (3) weeks after GPO approval, the Contractor shall upload information about innovative practices to the PATH Web page.

Task 9.5.4.3: Expert Presentations

The Contractor shall develop an “Experts Forum” web page as part of the PATH web site that features presentations by, and interviews with, national experts on subjects of special interest to State PATH Contacts and PATH-funded programs. The Contractor shall develop up to six (6) such presentations during each contract year. The Contractor shall obtain GPO approval prior to finalizing the selection of experts and topics that will be featured.

Task 9.5.4.3.1: By Week 9 of each contract year, the Contractor shall solicit input from State PATH Contacts and PATH-funded programs regarding experts and topic areas that should be featured.

Task 9.5.4.3.2: By Week 10 of each contract year, following GPO approval, the Contractor shall create a timetable and schedule presentations with featured experts

Task 9.5.4.3.3: Within one (1) week of GPO approval of the timetable, the Contractor shall create or modify an “Experts Forum” section on the PATH web site. In accordance with the timetable approved by the GPO, the Contractor shall create an audio or video recording of an interview and/or presentation by the expert presenter. The Contractor shall create and edit a transcript of the interview and/or presentation, and post audio files,

transcripts, supporting text files, and Powerpoint slides on the “Experts Forum” section of the web site.

Task 9.5.5: Individualized and Transformational Technical Assistance to State PATH Contacts

During each contract year, the Contractor shall provide individualized TA for up to 15 State PATH Contacts who request such assistance. Such assistance is likely to average about three (3) hours of staff time, monthly, in direct communication with each recipient State PATH Contact. The Contractor shall respond to, suggest, and advise on the implementation of practices considered transformational and innovative. Related especially, but not exclusively, to this effort, the Contractor shall recommend to the Federal PATH staff the deployment and use of additional TA (off-site or in-state) to meet specific implementation needs, as requested, by the State PATH Contact. Such additional and implementation-related TA will be available from contract resources for at least eight (8) States.

Task 9.5.5.1: Four (4) weeks after the start of each contract year, the Contractor shall propose a method of announcing and selecting States, and, after GPO approval is obtained, shall invite and propose States to receive the individualized assistance. Two (2) weeks following GPO approval, the Contractor shall begin providing such assistance to selected States, on a continuing basis. Following GPO approval, the Contractor shall prepare and enter into a written, but non-binding, statement of intent, in which the State indicates its intent to implement a specified practice and the Contractor (on behalf of the Government) indicates its intent to provide specified TA.

Task 9.5.5.2: Beginning four (4) months after the signing of the mutually acceptable non-binding agreement, the Contractor shall report – at 4-month intervals – progress made on designated implementations.

Task 9.6: Prepare and Disseminate Technical Assistance Documents

Task 9.6.1: Disseminate Information Concerning Exemplary Practices

The Contractor shall prepare descriptions, approximately 3-5 pages each, of interventions that incorporate exemplary practices relating to the delivery of PATH-funded services (e.g., mainstreaming, partnerships between PATH-funded programs and business organizations). The Contractor shall prepare up to five (5) such descriptions during each contract year.

Task 9.6.1.1: By no later than Week 8 of each contract year, the Contractor shall propose a strategy for identifying exemplary practices.

Task 9.6.1.2: Within two (2) weeks after receiving GPO approval, the Contractor shall obtain information about these exemplary practices from State PATH Contacts and submit a list of proposed exemplary practices.

Task 9.6.1.3: The Contractor shall submit to the GPO an outline of each proposed practice by no later than two (2) weeks after GPO approval of each proposed practice.

Task 9.6.1.4: The Contractor shall submit to the GPO drafts of the reports by no later than eight (8) weeks following GPO approval of each outline.

Task 9.6.1.5: The Contractor shall write a final report by no later than two (2) weeks after GPO approval of the draft reports.

Task 9.6.1.6: The Contractor shall disseminate/mail the reports to State PATH Contacts and local providers by no later than two (2) weeks after receiving GPO approval. Reports are expected to average approximately six (6) pages.

Task 9.6.2: Prepare Technical Assistance Documents

The Contractor shall prepare up to two (2) curricula, issue papers, or other documents, (approximately 50-60 pages) during each contract year.

Task 9.6.2.1: By Week 46 in Year 1 and Year 3 of the contract, the Contractor shall propose for selection, by designated Federal Program Staff, a list of possible topics for the document.

Task 9.6.2.2: Within four (4) weeks after GPO approval, the Contractor shall submit an outline of the selected document.

Task 9.6.2.3: Within six (6) weeks after GPO approval of the outline, the Contractor shall submit a draft of the document.

Task 9.6.2.4: Two (2) weeks following approval of the draft by designated Federal Program Staff, the Contractor shall submit a final document.

Task 9.6.2.5: Two (2) weeks following GPO approval, the Contractor shall submit a final draft and distribute the report.

Task 9.6.3: Publication Clearance: Policy Papers, Reports

The Contractor, as directed by the GPO, shall complete the publication clearance forms on Task 9 products and any other PATH-related products of this contract, as specifically designated by GPO.

The Contractor shall apply DHHS and SAMHSA communication policies and procedures [see *Communications Planning and Clearance Processes Guidelines*, January, 2006] to the development and writing of publication clearance forms. This involves working with the GPO in developing and writing clearance requests for products being developed under this contract. The Contractor shall ensure that clearance documents, particularly concept

clearance justifications (HHS 615, line 9), are complete and contain information that is concise and appropriate.

Clearance forms for this task shall be circulated for clearance at CMHS/SAMHSA via the GPO and/or the Center Publication Coordinator. Upon receipt of final content clearance approval from DHHS, the Contractor shall assist the GPO, and other designated CMHS staff, in expediting the printing of all HPB publications. GPO requests to the Contractor for this requirement may include, but are not limited to: preparation of printing specifications; completion of the Printing and Visual Services form (HHS-26) with all necessary information; review of book blues and color match prints from printers to ensure they meet Government Printing Office printing requirements; and coordination of the dissemination of printed products with the appropriate clearinghouse and/or recipients.

Task 9.6.4: Maintain Rosters

Task 9.6.4.1: Maintain Roster of State PATH Contacts

The Contractor shall maintain a roster of PATH State Contacts, including names, addresses, telephone and FAX numbers and e-mail addresses. The roster must include both primary contacts and secondary or alternative contacts. The roster shall be updated as necessary, following consultation with the GPO. The roster shall be distributed to State PATH Contacts and others, as identified by the GPO. The first roster shall be completed and submitted to the GPO by Week 10 of the contract; subsequent updates shall be prepared approximately every three (3) months, or at such other times as may be agreed upon by the Contractor and GPO.

Task 9.6.4.2: Maintain listing of local PATH provider organizations

The Contractor shall develop and annually update a listing of all local provider organizations that receive support under the PATH program. The listing shall contain the names, locations, and contact persons for each agency. The listing shall also include information on the type of organization, amount of PATH funding received, and the nature of the PATH services provided by the organization. The listing shall be developed and submitted to the PATH-GPO within six (6) weeks after the start of the contract and each option renewal date, and be uploaded to the PATH web page.

Task 9.7: Development and Implementation of SSI-Related Activities

Contract activities specified in other sections of Task 9, or otherwise designated as related to PATH activities, shall include efforts to help agencies assist persons who are homeless in obtaining SSI/SSDI eligibility. These activities may include, for example, developing guides, toolkits, training material, curricula and manuals related to the subject. It may also include training (including training for trainers); specialized TA (at locations, or at a distance); internet activities and peer-based assistance; and convening meetings or assessing implementations.

Based on the above, the Contractor shall provide a brief report (approximately 4 pages) identifying SSI/SDI eligibility activities supported by Task 9 that occurred in the first six (6) months of the contract year, and that will occur during the remainder of the contract year.

Task 9.8: Preparation of Reports

The Contractor shall prepare and submit the following reports:

Task 9.8.1: Tri-monthly Progress Reports

Beginning in Week 3 of the contract, and bi-weekly thereafter, the Contractor shall provide an agenda and report by telephone of the progress of Task 9 and related tasks of the contract. The Contractor shall also submit one (1) copy each of a letter-type progress report to the GPO and the Contracting Officer by the tenth day of the fifth month of Year 1; and every four months thereafter throughout the duration of the contract. The report must describe progress made during the previous months and include a description of the following: (1) all activities performed for each task during the months since the last report; (2) problems encountered and proposed or enacted solutions; (3) plans for the upcoming months until the next report; (4) a listing of all requests for information and assistance that were completed and a listing of outstanding requests for information; (5) a brief discussion of the expenditure of funds; (6) a statement that _____ percent of the contract period has been completed and that _____ percent of the funds have been expended; and (7) a statement that the contract will (or will not) be completed in accordance with the time frame specified in the delivery schedule and will (or will not) be completed within the budgeted amount.

Task 9.8.2: Assessment of Task 9 Activities

The Contractor shall assess, annually, the effectiveness of the various activities and methods used in performance of this contract, including site visits, state-specific telephone conference calls, work groups, conferences, and Internet-based products. The goal of the assessment is to recommend any changes: (1) in relative use of activities, and (2) in specific methods. The assessment is not expected to entail provisions that require OMB clearance.

The Contractor shall submit draft plans for such assessment to the GPO by no later than Week 10 of each contract year.

The Contractor shall deliver a draft assessment report by no later than 28 weeks following GPO approval of the plan. The Contractor shall prepare a final copy two (2) weeks following GPO review of the draft report. Reports are expected to average 8-10 pages.

Task 9.8.3: Draft Final Report

Four (4) weeks prior to the contract expiration date, the Contractor shall submit to the GPO for review and comments a Draft Final Report that summarizes the results of the activities conducted during the performance of Task 9, including problems encountered and their solutions. The Contractor shall incorporate any comments or suggestions received from the GPO into the Final Report.

Task 9.8.4: Final Report

The Contractor shall submit three (3) copies of the Final Report to the GPO, as approved above, and one (1) copy to the Contracting Officer, within two (2) weeks after GPO approval of the Draft Report.

Schedule of Deliverables and/or Reporting Requirements for Tasks 1-8

The Contractor shall prepare and submit the following deliverables:

Task	Description	Quantity	Delivery
1.1	Startup meetings/transition	Up to 5 mtgs.	Within 3 weeks of Contract Effective Date (CED)
1.2	Contract Turnover Plan	2	60 days prior to expiration of contract
1.3	Kickoff Meeting	1	Within 2 weeks of CED
1.3	Draft work plan	2	Within 2 wks. Presented at kickoff mtg.
1.5	Meeting with GPO	1/wk for 1 st 6 months, then every 2 weeks	Meeting with GPO
1.6	Biannual Meeting	2/year	Every 6 months after CED
1.7	Monthly Progress Reports	1	On the 10 th of the month following end of reporting period
1.8	Quarterly Budget Reports	2	2 wks following end of each quarter
1.9	Annual Report	2	2wks after end of contract year
C., Gen'l Req's	IT Plan	2	Within 1 month of CED
C., Gen'l Req's	IT Security Plan	2	Within 1 month of CED
1.11	Advisory Steering Committee Meeting	1/year	Within the first 4 months of CED
1.12	Marketing Plan	2	NLT 2 weeks after CED
2	Library Database	Monthly	Part of monthly progress report
3	Annotated Bibliographies	Updated annually	NRCH website update
4.1	Website Annual Plan	2	6 weeks of CED
5	Publication Clearance	TDB	TBD
6	Papers, manuals, curricula, et al.	2	2 in Base Year of contract
6	Plan for topics of papers/reports	1	4 weeks of CED
6	Develop Plan to develop trauma toolkit and trauma curricula	1	Must be completed within the Base Year
7.1	Respond to Requests for Information	As necessary	Within 24 hours of initial contact
7.2	Conduct Regional Workshops	2	Base year
7.2	Conduct training on Trauma	2	Pilot tested within Base Year
7.3	Provide training & Tech. Assist.	1	One (1) in Base Yr. and Op. Yr. 2
7.3	Provide list of training consultants	1	Within 2 wks of CED
8.1	Work Plan for National Conference	1	4 weeks of CED
8.1.1	Develop topics/tracks	1	6 weeks of CED
8.1.2	Determine Faculty	1	8 weeks of CED
8.1.3	Plan for materials and printing	1	8 weeks of CED
8.1.4	Coordinate hotel logistics	1	At least 6 months before Conference date

Task	Description	Quantity	Delivery
8.1.5	Registration (online)	1	At least 1 month before Conference date
8.1.6	Continuing Education Units	1	At least 2 months before Conference date
8.1.7	Consumer Scholarships	1	At least 2 months before Conference date
8.1.8	Resource room	1	At least 6 months before Conference date
8.1.9	Site Tour Visits	1	At least 3 months before Conference date
8.1.10	Conduct Conference	1	Base Year., Option Years 2 & 4
8.2	Conduct Planning Meeting	1	TBD
8.3	Complete follow-up activities	1	6 weeks after end of conference

Annual Items

The following items are due in, or must be completed during, the Base Year of the contract and all Option Years.

Task	Description	Quantity	Delivery
1.3	Draft work plan	2	Within 2 weeks. Presented at kickoff meeting.
1.5	Meeting with GPO	Every 2 weeks	Meeting with GPO
1.6	Biannual Meeting	2/year	Every 6 months after CED
1.7	Monthly Progress Reports	1	On the 10 th of the month following end of reporting period
1.8	Quarterly Budget Reports	2	2 weeks following end of each quarter
1.9	Annual Report	2	2 weeks after end of contract year
1.10	Final Report	2	4 weeks prior to end of contract
Page 4	IT Plan	2	Updated within 1 month of new contract year
Page 4	IT Security Plan	2	Within 1 month of CED
1.11	Advisory Steering Committee Meeting	1/year	Within the first 6 months of new contract year
2	Library Database	Monthly	Part of monthly progress report
3	Annotated Bibliographies	Updated annually	NRCH website update annually
4.1	Website Annual Plan	2	6 weeks of beginning of new contract year
6	Papers, manuals, curricula, et al.	2	2 in Option Years 2 and 4 4 in Option Years 1 and 3
6	Plan for topics of papers/reports	1	4 weeks of beginning of each contract year
7.1	Respond to Requests for Information	As necessary	Within 24 hours of initial contact
7.2	Conduct Regional Workshops	2	Each Option Year
7.3	Provide training & Tech. Assist.	4	4 in Option Years 1, 3 and 4
7.3	Provide list of training consultants	1	Within 2 weeks of each new contract year
8.2	Conduct Conference	1	Option Years 2 and 4

In addition to the above items, the following items shall be delivered as follows:

Description	Quantity	Due Date	Delivery
<u>Public vouchers</u> . Standard Form 1034 to be prepared in accordance with SAMHSA Billing Instructions.	Original & two (2) copies to C.O.; One (1) copy to Task 1-8 GPO	Monthly, within 20 days after end of period reported.	CO/Task 1-8 GPO

Schedule of Deliverables and/or Reporting Requirements for Task 9

Task	Description	Quantity	Delivery
9.1	Finalize plan of performance	1	
9.1.1	Draft plan of performance	1	2 weeks after the start of the contract year
9.1.2	Finalize plan of performance	1	2 weeks after GPO approval
9.1.3	Submit draft plan of performance for following year	1	48 weeks after start of the contract year
9.1.4	Submit revised plan of performance for following year	1	2 weeks after GPO approval
9.2	Technical Assistance at State Locations	8*	
9.2.1	Submit plan for selection system	1	4 weeks after start of the contract year
9.2.2	Recommend States for TA	1	10 weeks after start of the contract year
9.2.3	Begin scheduling State TA	8*	2 weeks after GPO approval
9.2.4	Recommend States for selection for following contract year	1	50 weeks after start of contract year
9.2.5	Submit Reports 3 weeks after each visit	8*	3 weeks after each visit
9.3	Meeting of State PATH Contacts	1	Only during Year 2 and Year 4
9.3.1	Draft agenda and presenter list	1	18 weeks after start of Year 2 and Year 4
9.3.2	Revise agenda and participant list	1	22 weeks after start of Year 2 and Year 4
9.3.3	Final agenda	1	24 weeks after start of Year 2 and Year 4
9.3.4	Submit evaluation of meeting	1	3 weeks after meeting, in Year 2 and Year 4
9.4	PATH Data		
9.4.1	Mail instructions to States and local providers	1	June 30 of each contract year
9.4.2	Contractor shall submit a draft copy of the OMB package to PATH-GPO		In Year 3 of the contract and otherwise, as needed
9.4.3	Contractor shall submit a final copy of the package to PATH-GPO		In Year 3 of the contract and otherwise, as needed, 2 weeks following GPO approval of an OMB package
9.4.4	Prepare draft of data tables	1	12 weeks after due date for States to provide data
9.4.5	Prepare final report of data tables	1	2 weeks after GPO approval
9.4.6	Submit draft program summary, including 1-page fact sheet.	1	April 1
9.4.7	Submit final program summary	1	2 weeks after GPO approval
9.5	Provide Technical Support for Field Generated Assistance		
9.5.1.	TA on National Topics	5*	
9.5.1.1	Identify topics and speakers	5*	4 weeks before the call
9.5.1.2	Notify recipients of telephone calls	5*	3 weeks before call
9.5.1.3.	Evaluation of each call	5*	3 weeks after call
9.5.1.4.	Prepare edited transcript	5*	4 weeks after call
9.5.2.	Issue Development Groups	3*	
9.5.2.1	Prepare list of issues	3*	8 weeks after start of the contract year
9.5.2.2	Draft report	3*	14 weeks after group is convened
9.5.2.3.	Submit final report	3*	4 weeks after GPO approval
9.5.2.4	Disseminate information	3*	2 weeks after GPO approval
9.5.3.	Mentoring Program		
9.5.3.1	Contact new State PATH Contact		3 weeks following their appointment
9.5.3.2	Conduct follow up meeting	1	3 weeks following participation in mentoring program
Task	Description	Quantity	Delivery

9.5.3.3	Host quarterly teleconferences	4	13 weeks after start of the contract and every 13 weeks thereafter
9.5.4.	Internet-based activities		
9.5.4.1	IT and IT Security Plans		
9.5.4.1.1	Submit Draft IT Plan	1	1 month after the CED
9.5.4.1.2	Submit Draft IT Security Plan	1	1 month after the CED
9.5.4.1.3	Submit Final IT Plan	1	2 weeks after DMS-IT approval
9.5.4.1.4	Submit Final IT Security Plan	1	2 weeks after DMS-IT approval
9.5.4.2.	Develop Web page		
9.5.4.2.1	Develop State Innovations Web pages	3	
9.5.4.2.1.1	Create a State innovation section on Web site		8 weeks after start of the contract year
9.5.4.2.1.2	Develop a process for selecting States		3 weeks after start of the contract year
9.5.4.2.1.3	Recommend States to be selected	3	8 weeks after start of the contract year
9.5.4.2.2	Develop experts forum	6*	
9.5.4.3.2.1	Propose a timetable for presentations		9 weeks after start of the contract year
9.5.4.2.2	Prepare final timetable for presentations	1	1 week after GPO approval
9.5.4.2.3	Create an experts' forum section on Web site	1	11 Weeks after start of the contract year
9.6	Prepare and disseminate documents		
9.6.1	Disseminate information about exemplary practices	1	
9.6.1.1	Propose strategy to identify exemplary practices	1	8 weeks after start of each contract year
9.6.1.2	Submit list of proposed practices	1	2 weeks after GPO approval of strategy
9.6.1.3	Submit outline of each proposed report	5*	2 weeks following GPO approval of proposed practices.
9.6.1.4	Submit draft of proposed reports	5*	8 weeks after GPO approval of each outline
9.6.1.5	Submit final reports	5*	2 weeks after GPO approval of each draft.
9.6.1.6	Distribute Reports	5*	2 weeks after GPO approval of final
9.6.2.	Prepare TA Documents	2*	
9.6.2.1	Propose topics for document	2	46 weeks after the start of the contract year
9.6.2.2	Submit outline	2	4 weeks after GPO approval
9.6.2.3	Submit draft document	2	6 weeks after approval of outline
9.6.2.4	Incorporate revisions		2 weeks after approval of draft
9.6.3.	Publication Clearance		as needed
9.6.4	Maintain Rosters		
9.6.4.1	Maintain Roster of State PATH Contacts	4	6 weeks after start of each contract year and at 3-month intervals thereafter
9.6.4.2	Develop list of local provider organizations	1	10 weeks after start of contract year

Task	Description	Qty	Delivery
9.7	Submit report of SSI Activities	1	6 months after start of contract year
9.8	Prepare Reports		
9.8.1	Submit progress reports	3	10 th workday of the 5 th month of the contract and every four months thereafter.
9.8.2	Assess TA		
9.8.2.	Submit draft plan for assessment	1	10 weeks after start of the contract year .
9.8.2.	Submit final plan for assessment	1	2 weeks after GPO approval
9.8.2.	Submit draft assessment report	1	28 weeks after GPO approval of plan
9.8.2.	Submit final assessment report	1	2 weeks after GPO approval of plan
9.8.3	Submit draft of final contract report	1	4 weeks before end of contract after GPO approval of final draft

Task	Description	Qty	Delivery
9.8.4	Final Report	1	Submit final version two weeks after GPO approval of draft

* Up to the quantity indicated

In addition to the above items, the following items shall be delivered as follows:

Description	Quantity	Due Date	Delivery
<u>Public vouchers</u> . Standard Form 1034 to be prepared in accordance with SAMHSA Billing Instructions.	Original & two (2) copies to C.O.; One (1) copy to Task 9 GPO	Monthly, within 20 days after end of period reported.	CO/ Task 9 GPO