



NAVY EXECUTIVE DEVELOPMENT PROGRAM

Performance Statement of Work
for the Department of the Navy
FLAG DEV
Strategic Thinking Course February 2015 Class

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1.0. Background/Scope

Under the direction of the Chief of Naval Personnel (CNP), the Navy Flag Officer Development Program (FLAG DEV) develops and sponsors professional, executive-level development programs for Flag officers and Senior Executive Service (SES) members of the Department of the Navy. Flag officers and SES members have access to a variety of executive development programs offered by DoD, Navy Executive Development Program, the Federal Executive Institute, and various external sources. Such developmental programs provide valuable opportunities to enhance leadership skills in diverse settings that include learning and networking with Flag and General officers as well as SES peers across services and agencies. Some of these programs are available to any Flag officer or SES member; others allocate a limited number of seats to Navy executives. The Strategic Thinking Course is one of two core executive education programs sponsored by FLAG DEV for Flag officers and Senior Executive development. The Strategic Thinking Course is a five and a half day senior executive program at a public university that harnesses the subject expertise of PhD professors in a graduate school environment. The course must be conducted by a university, school, or education program affiliated with a university business school that specializes in custom executive education programs.

1.1. Project Objectives

The desired outcome of the Strategic Thinking (ST) curriculum is a cadre of Flag officers, members of the SES community, and international Flag officers from select navies who demonstrate the ability to think strategically, execute Chief of Naval Operations (CNO) strategy, lead change, and produce more effective and efficient business operations. Specifically they will:

- Be motivated to improve efficiency in how their organization/command does business
- Understand their role in the global environment
- Understand how to assess and take prudent risks, how to manage risk
- Possess the capability to formulate strategies for human capital and information resources supporting Navy's maritime strategy
- Possess the capability to critically assess their organization's mission, to formulate an effective strategy in a changing environment, and implement a plan to execute the strategy
- Be able to identify and examine external and internal changes and how they may affect the current strategy



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- Understand the "big picture" and how their role affects external stakeholders
- Be able to understand and execute strategic diversity initiatives
- Be able to execute strategic program assessment, looking at organization and initiatives, to assess if meeting objectives
- Understand the role of ethical decision making and establishing/sustaining an ethical environment
- Exhibit corporate citizenship with empowering tools/insights and collaborative skills
- Possess the capability to maintain a healthy lifestyle with extremely demanding executive schedules

1.3. This contract shall be performed in accordance with:

- (a) This Statement of Work (SOW); and
- (b) All other terms and conditions of this contract.



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2.0. Program Management

The following are key positions, which are important to the functioning and oversight of this contract in support of Flag officer development:

2.1. The Service Provider Manager or Program Director is responsible for the overall administration of this agreement on behalf of the University.

2.1.1. The Service Provider Manager shall identify any authorized representative(s) for curriculum, technical and administrative performance of all services required in the agreement. The Service Provider Manager should be someone with at least a Master's degree who is specifically involved in executive development/education at university/institution/school. Preferably someone with prior Naval background at the O6 or above paygrade or experience in senior executive federal, government, or DoD programs. The Service Provider Manager should have prior knowledge of task orders and delivery orders and have been a Service Provider Manager for other Navy senior executive education programs within the last two years.

2.1.2. The Service Provider Manager will provide Flag Officer Management with a phone number, fax number and email address for use in contacting representatives during business hours.

2.1.3. At the conclusion of the February class, the Service Provider Manager and the FLAG DEV Program Manager/COR/ACOR will discuss contract performance issues. The Service Provider shall provide a written report to the FLAG DEV Program Manager on the work performed under this contract. The report template will be supplied by the FLAG DEV Program Manager, to include a breakdown of the activity against each task number and associated costs.

2.1.4. The Service Provider Manager will designate a Representative responsible for day-to-day operations and administrative needs of this contract. The Representative will:

- a. Be available for contact on a daily basis during normal work days, defined as Monday through Friday (except federal holidays), between the hours of 8 a.m. and 5 p.m.
- b. The Representative will monitor all FLAG DEV activities as required for quality assurance to include providing unedited participant feedback.
- c. The Representative will be responsible for providing logistical information to all class participants and ensure they have access to class materials and read-aheads.



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d. The Representative will be responsible for the arrangement for lodging and meals for participants for the duration of the course.

e. The Representative will be responsible for the coordination with the Naval Postgraduate School(NPS) staff in order to upload course material to the Navy Executive Development Program website which will be accessed by all participants.

2.1.5. The Service Provider Manager will be available to provide update briefings to the FLAG DEV Program Manager. In addition, the Service Provider Manager, along with appropriate content experts/faculty members will be available to attend walk-through meetings as specified in Appendix 1 of the Statement of Work.

2.1.6. The Service Provider Manager will provide a SharePoint site to facilitate the exchange of information/deliverables between the University and the FLAG DEV Program Manager (or designees).

2.2. The Director of Flag Officer Management and Development (hereon referred to as FLAG DEV) is responsible for the overall administration of this agreement on behalf of the Chief of Naval Personnel.

2.2.1. FLAG DEV shall identify personnel who will be authorized to provide technical and administrative support of all products and services to be delivered in the agreement.

2.2.2. FLAG DEV will review all reports and will participate on all meetings/conference calls with the Service Provider Manager.



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3.0. Tasks: Navy/SES Strategic Thinking Development

The following tasks should be supported by the University:

3.1. “Strategic Thinking” Course Development and Delivery:

3.1.1. Design and develop the “Strategic Thinking” program for the FLAG DEV Flag/SES cadre to successfully navigate complex strategic issues confronting them at enterprise and global levels. Participants should be able to demonstrate the ability to imagine new and different futures which may lead the organization to redefine its core strategies.

3.1.1.1. **Course components:** Course desired effects will be accomplished through a variety of activities— each intended to produce course component/module learning objectives which support or enable the course desired effects.

3.1.1.1.1 These components include learning segments that focus on familiarizing participants with the overall Echelon I perspective. At a minimum, this segment will include presentation and discussion of the importance of Strategic Thinking from a Navy perspective by an active duty Naval officer at the three-star or higher rank; a defense industry presentation from an outside speaker with significant experience and knowledge in the defense industry; fiscal reality and economics discussions; core capabilities discussion.

The overall intent of these segments is to provide a context within which participants can assess what their organization must do, do differently, or what it can stop doing to align its efforts with the Navy’s strategic intent and guidance and can evaluate the impact on critical enterprise outcomes of changing or realigning their organization’s resources. School faculty should provide relevant vignettes and or case studies to highlight and demonstrate their relevance to the audiences’ role as a Navy executive.



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- 3.1.1.1.2 Learning segments that focus on the skills needed to lead an Echelon II (or subordinate) organization, or a major staff organization, in the enterprise context:
 - 3.1.1.1.2.1 Strategic Thinking skills at the Chief Executive Level. At a minimum, segments on the role of the executive, strategic thinking, business strategy formulation and execution, collaboration, leading change, ethical decision making, and developing a global perspective will be included.
 - 3.1.1.1.2.2 Related functional skills from an executive perspective. At a minimum, segments on financial management, human capital/talent strategic management including performance management, informal/emergent/social networks, risk management, partnering and diversity (generational, racial, gender) will be included.
- 3.1.1.1.3 Learning segments based on presentation and discussion of relevant examples: private sector speakers or case studies, and/or Navy case studies and/or vignettes.
- 3.1.1.1.4 Daily facilitated discussion sessions that focus on relating concepts presented in class to participants' organizations and operating environments in terms of how executive skills can be optimized in problem solving. General pre-course readings and exercises, both mandatory and suggested, should be assigned in advance. Utilize pre-course assignments to make valuable classroom time more effective. Evening group assignments and/or readings pertaining to next day's topics normally should be assigned.
- 3.1.1.1.5 A mechanism or process that allows for a 3 or 4 Star Admiral who has retired in the last 5 years, to be provided/hired and funded by the school (with prior approval from PERS-00F) to teach an ethical leaders/decision-making module. This person will help maintain Navy-centricity to the course.
- 3.1.1.1.6 A mechanism or process that allows a current active-duty 3 or 4 Star Admiral or SES equivalent (with prior approval from PERS-00F) to be provided to instruct/lead a module on why Strategic Thinking is important to the Navy.
- 3.1.1.1.7 Use of breakout sessions to apply the tools/perspectives learned during the course.



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- 3.1.1.1.8 Presentations by senior executives from private sector, defense industry, and Navy/DOD principals to address relevant issues and examples of Enterprise management.
- 3.1.1.1.9 Faculty with extensive current and prior experience with senior executive and military leader education. Must currently have the expertise, faculty, teaching materials and curriculum to conduct the Strategic Thinking (ST) course with existing resources.
- 3.1.1.2 All project-related documents shall be created and delivered in Microsoft Office format (e.g., Word, PowerPoint, or Excel, version 7.0 or higher), and include Department of the Navy branding. All materials shall remain the exclusive property of the Department of the Navy.
- 3.1.1.3 A walk-through meeting and client approval are required to proceed upon completion of detailed design and participant material development.

3.1.1.3.1. Detailed design, including: target audience description; learning objectives; detailed learning strategies; estimated course length (not to exceed five and a half days); daily agenda including faculty/presenter/speaker requirements – government and all others; learning environment description. The offeror shall offer a fully integrated, executive-level learning and lodging environment with classrooms, lodging, and fitness accommodations located no more than a half-mile from one another.

3.1.1.3.1.1 Provisions to anticipate that up to 25% of participants arriving on the night before the specified commencement date of each course and to anticipate up to 25% of participants staying an additional night after the course. Costs for lodging and travel by participants will be covered by their parent command. Lodging rates will be set as those determined by the Joint Travel Regulations (<http://www.defensetravel.dod.mil/site/perdiemCalc.cf>). Pricing should not include food or lodging, as students will be expected to pay individually for food and lodging at current per diem rate.

3.1.1.3.1.2 Means for participants to establish internet connections (for laptop or tablet computers), including hard wired connections and/or wireless connects for laptop computers and other similar devices.



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3.1.1.3.1.3. Three meals per day starting the evening prior to course start and concluding with a lunch or evening meal on the final day and prior to departure. Meals and opening reception shall be billed by individual participant.

3.1.1.3.1.4. Classroom/learning environment, "break-out" spaces and lodging sufficient to accommodate up to 30 participants including observers. Actual maximum classroom size may be less depending on contractor's proposed methods to complete course objectives.

3.1.1.3.1.5. Adequate recreation/work-out facilities onsite or located within a half-mile (walking distance) from lodging. Athletic facilities must be able to accommodate multiple instructor led group exercise sessions able to accommodate a potential class size of 25.

3.1.1.3.1.6. Reasonable and customary refreshments while class is in session.

3.1.1.3.1.7. Design process must include needs analysis conducted with input from FLAG DEV leaders to result in program components that are highly contextual and aligned with CNO/CNP strategic imperatives and program objectives outlined in 1.2.

3.1.1.3.1.8. Design should drive the improvement of individual and organizational capabilities by expanding perspectives, increasing confidence, and attaining higher levels of leadership knowledge.

3.1.1.3.1.9. Design should build community among Navy, Marine Corps senior executives and officers, and international Flag officers through gaining vital knowledge, sharing perspectives with one another, and forging sustainable alliances. Further, the design should build consensus on the need to, and promote the capacity to, lead inclusively.

3.1.1.3.1.10. Design should deepen affinity with Navy and Marine Corps ethos and core values; instill pride in Flag officer/SES contributions to the Department of the Navy and the nation; and inspire ownership to build organizational commitment to strategic behavior.

3.1.1.3.1.11. Design must consist of a unified, integrated set of challenging learner experiences relating to contemporary individual and



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organizational issues, using a full range of learning approaches such as: team exercises, simulation, peer-to-peer feedback, field exercises, coaching, business and Navy case study, experiential learning, and interactive lecture.

3.1.1.3.1.12. Design must incorporate completion of an executive level individual and/or group activity that incorporates all course objectives.

3.1.1.3.1.13. Design must incorporate an executive Health & Wellness plan that incorporates a minimum of two (2) group exercise sessions, a one (1) hour brief/presentation on nutrition and fitness, individual physical health evaluations/counseling and fitness plans from a qualified nutrition and fitness expert.

3.1.1.3.1.14. A formal evaluation mechanism for gathering information upon which to measure the effectiveness of the course, for both individual instructors and the course in general. These evaluations must be sent directly to PERS00F upon completion of the course, in electronic format.

3.1.1.4. Development of participant materials, including: revised learning objectives (if changes); course length (if changes); participant welcome packet; daily agenda; participant and sponsor course materials; resource requirements; staffing, including program/staff statistics and executive education rankings with respect to course design, teaching methods/materials, faculty, follow-up, food and accommodations, facilities, women participants, international participants, and faculty diversity) ; any changes to previously approved design specifications.

3.1.1.4.1 University to produce high quality, first generation “electronic” copies to all participant materials for program delivery. Program materials to include pre-work; course binder; table of contents; tabs; “Welcome” content including daily agenda, biographies of participants, sponsor, speakers and faculty; session content; daily evaluation form to include ratings and comments for each session. Distribution of all course content shall be formatted for iPad or similar electronic tablets. FLAG DEV office shall supply all iPads to the university specifically for the Strategic Thinking Course. The care, maintenance, software updates will all be the responsibility of the university.

3.1.2. Deliver Thinking program for the FLAG DEV flag/SES cadre.



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3.1.2.1. Send welcome packet to program participants, including registration confirmation letter; course days and dates; class hours; course outline; logistics information including meeting and lodging locations; directions to meeting and lodging locations; instructions for communicating dietary concerns while at training; instructions for notification of course cancellation or delay due to inclement weather or emergency; instructions for contacting participants while at training.

3.1.2.2. Federal government uniformed and civilian employees do not receive fees for teaching or speaking. Fees for other instructors or speakers are to be included in the cost of program delivery when submitting proposals.

3.1.2.3. Identify and secure an appropriate training site and arrange all related logistics, such as classrooms, meals, equipment, materials, etc. Site must be pre-approved by FLAG DEV. These deliverables shall be identified as direct material costs for course delivery, thus resulting in a fixed price throughout the term of the contract. Any Other Direct Costs (ODCs), as defined in FAR, shall not exceed an additional 30% of fixed direct labor and material costs.

3.1.2.4. Conduct the program per the approved design and obtain an average score of 4.0/5.0 on program evaluation for each full program. Individual program segments must attain a score of 3.0 (met expectations) or better; remediation plan must be submitted and implemented for segments receiving a score of less than 3.0.

3.1.2.4.1. Over time, the University may recommend enhancements to program content or delivery. The FLAG DEV encourages such continuous improvement. All content or delivery changes must be approved by the FLAG DEV in advance, and prior to program delivery, an electronic version and first generation hard copy of all course materials must be updated and provided to the FLAG DEV. Electronic documents are to be supplied in Microsoft Office format, version 7.0 or higher.

3.1.2.4.2. The FLAG DEV reserves and may exercise its right to direct changes in course content or delivery, or to disallow further delivery of the program by the University, if results are unsatisfactory.

3.1.2.5. Conduct course evaluation for every program delivered, per the approved evaluation method; submit summary evaluation and individual participant evaluations to FLAG DEV within two weeks of program completion.



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3.2 Functional and Technical Requirements

3.2.1. Contractor shall meet with the COR or ACOR (can be done via telephone) prior to scheduled course session to review accommodation details.

3.2.2. Timelines: Accommodation arrangements must be completed 30 days prior to the course start date. Participant names will be provided to the contractor not later than 20 days prior to the start date.

3.2.3. Deliverables: A written report summarizing the accommodation plan for the course is required.

3.3 Quality Assurance Surveillance Plan (QASP)

3.3.1. Contractors shall have a means to collect both qualitative and quantitative feedback for individual facilitator as well as the course as a whole.

3.3.2. Contractors must be aware of and tie-in learning objectives from other Navy Executive Development Programs (NEDP). Contractors will provide reasonable, open collaboration of course content between partner schools in the NEDP framework to ensure alignment between ST and other Flag-level NEDP curricula.

3.3.3. Timelines: Feedback format will be approved by the COR or ACOR no later than 1 week prior to the class commencing. Feedback does not need to be approved for subsequent sessions, providing there are no changes. Daily feedback should be collected during the course and overall evaluations at the completion of the course.

3.3.4. Deliverables: Contractor will provide oral feedback to COR and ACOR at the conclusion of the course. The contractor will provide the COR and ACOR with electronic copies of all daily feedback and overall evaluation as well as their summary of the course strengths, weaknesses and any recommendations for improvement no later than two weeks after completion of the course.

3.4. Consulting

3.4.1. Provide project-related consultation in response to requests by the FLAG DEV Program Manager (or designees).



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3.4.1.1. Consultation shall include all project-related content expertise, including: project planning; presentation, discussion, or recommendation of research; discussion related to design or methods; debrief meetings while programs are in session; discussion of participants' or others' program evaluations; discussion of improvement recommendations, etc.

3.4.1.2. Consultation shall be provided by the appropriate content expert, and may not be passed through a Service Provider Manager or administrative resource.



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4.0. Reports

4.1. The Service Provider Manager or Project Director shall provide the FLAG DEV Program Manager with summary reports via electronic file on all strategic thinking development activities against tasks identified within this SOW. The contractor will provide the COR and ACOR with electronic copies of all daily feedback and overall evaluation as well as their summary of the course strengths, weaknesses and any recommendations for improvement. The reports shall be submitted no later than two weeks of course completion. The report template will be supplied by the FLAG DEV Program Manager. The report content and appearance are subject to FLAG DEV approval.

4.2. At a minimum this report shall contain the following:

Each Task number

Activity against each Task number (written description)

Cost expended against each Task number

Fees/Unit Cost for tangible product deliverables

Remaining Hours/Cost for each Task number



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APPENDIX 1

Deliverable Line Items

Period of performance: From the date of award through 31 March 2015.

Section	What will be Inspected	Acceptable Quality Level (AQL)	Method	Frequency
2.1.2	Service Provider representatives' contact information	Task proceeds as scheduled during the appointed day and time	Sent to Navy Flag Management	7 days after contract signature
2.1.3	Reports	Report provided to PERS-00F in format provided	Reports from vendor sent to technical POC	One-Time
2.1.6	SharePoint site	Task proceeds as scheduled during the appointed day and time	Personal observation by COR/ACOR	Within 30 days of contract signature
3.1.1.1	Delivery of Strategic Thinking course components	Task proceeds as scheduled during the appointed day and time	Personal observation by COR/ACOR	Walk through 22 DEC 2014
3.1.1.2	Delivery of Strategic Thinking project-related documents	Task proceeds as scheduled during the appointed day and time	Personal observation by COR/ACOR	Walk through 22 DEC 2014
3.1.1.3	Delivery of Strategic Thinking high-level, detailed design	Task proceeds as scheduled during the appointed day and time	Personal observation by COR/ACOR	Walk through 22 DEC 2014
3.1.1.4	Development of Strategic Thinking participant materials	Task proceeds as scheduled during the appointed day and time	Personal observation by COR/ACOR	Walk through 22 DEC 2014
3.1.2.1	Course welcome packet sent to participants	Task proceeds as scheduled during the appointed day and time	Personal observation by COR/ACOR	5 weeks before course start date
3.1.2.3	Identify and secure	Task proceeds as	Personal	5 JAN 2015



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	training site and all logistics	scheduled during the appointed day and time	observation by COR/ACOR	
3.1.2.4	Strategic Thinking	Task proceeds as scheduled during the appointed day and time	Personal observation by COR/ACOR	Start Date 1FEB 2015
3.1.2.4.1	Course documentation (Enhanced)	Documentation provided to PERS-00F on task	Sent to COR/ACOR	Prior to course delivery
3.1.2.5	Course evaluation	Evaluation provided to PERS-00F on task	Sent to COR/ACOR	14 days after course completion date
3.2.3	Accommodation plan	Task proceeds as scheduled during the appointed day and time	Sent to COR/ACOR	31 Dec 2014
3.3.4	Delivery of task during times scheduled	Task proceeds as scheduled during the appointed day and time	Personal observation by COR/ACOR	Task proceeds as scheduled during appointed time
3.4	Consultation	As needed	Personal observation by COR/ACOR	As needed



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APPENDIX 2

Response Requirements

- i. Technical Approach
 - Proposal must describe how the University would approach the project objectives.
 - Proposal must describe the various learning methodologies that will be applied to achieve objectives during the “Strategic Thinking” program
 - Proposal must describe how the training and action learning programs will result in individual and organizational performance impact.
 - Proposal must describe Navy and/or military and business case studies with application at the strategic level and with direct tie-in to project objectives. Should be inclusive of courses recently (within the last three years) taught to Flag/Senior executives utilizing university faculty, senior military officers as instructors/presenters, and outside speakers.
 - Proposal must demonstrate an overall ordering of course modules and identify specific activities within each module needed to produce, individually or in combination, the course objectives. Learning objectives for each activity—focused specifically on which learning objectives contribute to producing which course desired effects.
 - Proposal must include a tentative course schedule consisting of executive learning activities/course modules to meet the requirements as set forth in Section 3.1.1.1. The course must be accomplished in no longer than 5.5 days. Assume the course begins with a Welcoming Reception and dinner on Sunday evening with classes beginning Monday and ending at lunch on Friday. Normal daily schedule 0730-1730 with frequent 15 minute breaks and 1 hour lunch. The schedule should provide for a 30-45 minute “nuggets session;” discussions and assignments may continuing into the evenings.
 - An overview of proposed pre- and in-class readings to include articles, books and other learning resources.
 - Course relevancy and flexibility is imperative to a successful program. This relies in part on guidance from Navy senior leadership. Contractors must be aware of and tie-in learning



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objectives from other NEDP programs. Additionally, in order to have a robust program, redundancy between different NEDP courses must be minimized while still maintaining awareness of the learning objectives of the different courses in order to preserve a common thread.

ii. Management Approach

- Proposal must submit a management plan and an outline/overview of proposed approach to the course that identifies the controls that will be put in place to assure quality and schedule accountability.

iii. Capabilities and Experience

- Proposals must include three past performance references (within the past three years) that reflect work that is of the same or similar scope, of the same magnitude, and of the same or similar complexity to that which is described in the statement of work.
Scope: Senior executive education for an organization with over 100,000 employees incorporating both classroom and action learning components
Magnitude: Staff position and experience/education levels and level of effort for the type of work being performed
Complexity: E.g. Alignment with the organization's strategic priorities and challenges; integration between programs; and technology-enabled learning platform
- Proposal must provide the names, Full/Part-Time/Adjunct Status, and resumes of all personnel proposed, including subcontractor personnel. The resumes should emphasize skills, education and experience specific to the Statement of Work. Personnel resumes should provide, at a minimum, the following information:
 - Name, years of experience, training, unique or special qualifications, positions held, and tenure with the University or firm;
 - Degrees held by each individual and/or other pertinent education. Includes Date(s), degree(s), and respective college or university from which the degree(s) were received;
 - The work history (including MM/YYYY start and end dates) of each person as it relates to the



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anticipated Statement of Work tasks to be assigned to that individual.

- A summary of instructor qualifications to include past experience with executive-level learning programs

- Proposals will be evaluated and the selected University is required to be staffed upon award.

iv. Delivery Schedule

The University must propose to provide all items according to the delivery schedule in Appendix 1.

v. Cost

Fixed prices for:

- Design, development, and delivery of FLAG DEV “Strategic Thinking” course.