# Performance Work Statement (PWS) for Declassification and FOIA

## PART 1 GENERAL INFORMATION

### 1 Description of Services

### 1.1 Background

The Joint Staff Declassification Branch, as part of the Information Management Division (IMD) of the Joint Staff Secretariat, provides declassification review services in accordance with the provisions of Executive Order (E.O.) 13526, the Freedom of Information Act (FOIA), Department of Defense (DoD) directives, Joint Staff implementing documents, and reviews requests as tasked by the Office of the Secretary of Defense (OSD) and the Washington Headquarters Services (WHS). This Performance Work Statement (PWS) is for the declassification review, action tracking, and administrative support for Automatic Declassification (AD), FOIA, Mandatory Declassification Review (MDR), Security Review (SR), Department of State Foreign Relations of the United States (FRUS), and Special Review (SPR) requests.

### 1.2 Purpose

The purpose of this contract is to acquire contractor provided technical and administrative support service for the declassification review, action processing, and tracking of record material. Federal full-time employees require contractor support to meet the mandated review requirements of the E.O. and FOIA review suspense dates to ensure that classified national security information is properly and accurately identified and protected, to maintain accountability of material, and respond to unforeseen events in the records review environment.

### 1.3 Objective

The objective of this contract/order is to provide contractor support to the Declassification Branch to comply with the mandated review provisions of the E.O., FOIA review requirements, DoD directives and Joint Staff implementing documents. The contractor shall provide technical, administrative, implementation and coordination support for document review, project control, tracking of records and database management.

The contractor shall provide all staffing, equipment, and materials necessary to perform the tasks as defined in this PWS; except that specified in Part 3 as Government Furnished Information, Facilities, Property, and Equipment. Contractor services will be provided primarily at the Pentagon, Washington D.C, the National Archives and Records Administration (NARA) facility in College Park, Maryland, and at other locations in the National Capital Region (NCR). The contractor shall perform to the standards in this contract. In this effort, the contractor shall provide strictly non personal services and shall work as an independent contractor not subject to supervision and control by the Government.

The contract staff will provide advisory and assistance services to the Government but retains no decision-making authority and will not perform inherently governmental functions. Contractors are prohibited from representing, or appearing to represent, the Government in the performance of Joint Staff business. When conducting business with Government personnel including meetings, conferences, and functions contractor will display their credentials and explicitly state their status as contractor employees.

### 1.4 General Information

#### 1.4.1 Period of Performance

The task order will consist of a 12-month base period, four (4) 12-month option periods pursuant to Federal Acquisition Regulation (FAR) 52.217-9, and a six-month option period pursuant to FAR 52.217-8. The anticipated dates are detailed below.

Base: 25 July 2026 – 24 Jan 2027
Option I: 25 July 2027 – 24 Jan 2028
Option II: 25 July 2028 – 24 Jan 2029
Option III: 25 July 2029 – 24 Jan 2030
Option IV: 25 July 2030 – 24 Jan 2031
Option V (FAR 52.217-8): 25 July 2031 – 24 Jan 2031

This PWS also includes tasks that will be performed under Surge CLINs that will be activated, as needed.

### 1.4.2 Place of Performance

The work to be performed under this contract/order will be performed at the Government and Contractor's facilities within the NCR. The current Government facilities are located at the Pentagon, Washington, DC; National Declassification Center (NDC), U.S. National Archives, College Park, MD. Additionally, the COR may designate other areas of performance in the NCR region. Specific and any additional places of performance will be identified by the COR at the time a need arises. The contractor's facilities must be located within 30 miles of the Pentagon. Contractor support and performance must be provided on-site, as required, with consideration of established DoD Health Protection Condition protocols and comply with related guidance.

### 1.4.3 Contracting Officer Representative (COR)

The Government will identify a COR and an alternate COR to assist the Contracting Officer with the technical aspects of the contract.

COR:
Timothy Graber
Joint Staff ODJS
timothy.d.graber.civ@mail.mil
(703) 697-9962

Alternate COR:
Justin Farmer
Joint Staff ODJS
justin.farmer2.civ@mail.mil
(703) 697-8798

### 1.4.4 Hours of Operation

The Contractor is responsible for contract performance between the hours of 0800 and 1630 Monday thru Friday, except Federal holidays or when the Government facility is closed due to local or national emergencies, administrative closings, similar Government directed facility closings, or when attending a Government team building event. The Contractor must maintain an adequate work force for the uninterrupted performance of all tasks defined within this PWS. When hiring personnel, the Contractor shall keep in mind that the stability and continuity of the work force are essential. Contractor is required to staff one (1) On-site Project Manager, one (1) Administrative Support Specialist, one (1) NARA Support Analyst, and a minimum of four (4) Senior Analysts. One of the four Senior Analysts must conduct ADR off site. Three of the four Senior Analysts must conduct FOIA, MDR, SR, or FRUS reviews in the Pentagon.

### 1.4.5 Recognized Holidays

It is not anticipated that the contractor will be required to perform contract services on the below federal holidays.

| | | |
|---|---|---|
| New Year's Day | Marin Luther King Jr. Day | President's Day |
| Memorial Day | Juneteenth National Independence Day | Independence Day |
| Labor Day | Columbus Day | Veterans Day |
| Thanksgiving Day | Christmas Day | |

## 1.5 Security Requirements

### 1.5.1 Physical Security

The Contractor shall be responsible for safeguarding all Government information or property provided for Contractor use. At the end of each work period, Government information, facilities, equipment and materials shall be secured as specified.

### 1.5.2 Clearance Level

All contractor personnel shall possess an active security clearance issued by the Department of Defense commensurate with their required level of access as specified in the individual tasks at time of the proposal submission. Contractor staff performing work on this contract are required to have a Top Secret (TS) clearance with Sensitive Compartmented Information (SCI) eligibility based on a Single Scope Background Investigation (SSBI) completed within the last 5 years as verified in the Defense Information System for Security (DISS). At least two Junior analysts and two Senior analysts are required to maintain an active TS/SCI clearance based on a SSBI completed within the last 5 years as verified in DISS. The Government will NOT sponsor companies for any security requirements. The Contractor shall comply with all security requirements listed in the attached DD254 by time of proposal submission. In addition, contractor personnel are required to have access to Restricted Data / Formerly Restricted Data, North Atlantic Treaty Organization (NATO), and Alternative Compensatory Control Measures (ACCM).

### 1.5.3 Facility Clearance

At the time of proposal, the Contractor (or Subcontractor) shall possess an active Top Secret Facility Clearance Level (FCL) accredited for storage of SCI from the Defense Counterintelligence and Security Agency (DSCA) as verified in the Industrial Security Facility Database. The Contractor (or Subcontractor) Top Secret FCL shall provide adequate storage to review the requisite amount of maturing records according to the JS records schedule provided in Section 4.3.2 of this PWS. Additionally, the Contractor shall have an IT network certified by DCSA and Sensitive Compartmented Information Facility (SCIF) accreditation by the Defense Intelligence Agency and shall maintain this level of security requirements throughout the life of the contract. All automated processing of TS, Secret and classified information shall be accomplished on DCSA-approved information systems.

### 1.5.4 Key Control

The Contractor shall establish and implement methods in accordance with the National Industrial Security Program Operating Manual (DoD 5220.22-M) to ensure all identification cards, SIPR tokens, computer access fobs, and desk/cabinet keys issued to the Contractor by the Government are not lost or misplaced and are not used by unauthorized persons. Keys issued to the Contractor by the Government shall not be duplicated. The Contractor shall develop procedures covering key control that shall be included in the Quality Control Plan. Such procedures shall include turn-in of any issued identification cards, SIPR tokens, computer access fobs, and desk/cabinet keys by personnel who no longer require access to locked areas/containers. The Contractor shall immediately report any occurrences of loss of identification card, SIPR tokens, computer access fobs, and desk/cabinet keys to the Security Officer identified on the contract DD Form 254.

The Contractor shall prohibit the use of Government issued keys/key cards by any persons other than the Contractor’s employees. The Contractor shall prohibit the opening of locked areas by Contractor employees to permit entrance of persons other than Contractor employees engaged in the performance of assigned work in those areas, or personnel authorized entrance by the Security Officer.

### 1.5.5 Lock Combinations

The Contractor shall establish and implement methods of ensuring that all lock combinations are not revealed to unauthorized persons.

### 1.5.6 Periodic Progress Meetings

The Contracting Officer, COR, and other Government personnel, as appropriate, may meet periodically with the Contractor to review the Contractor's performance. At these progress meetings the Contracting Officer will provide feedback to the Contractor on how the Government views the Contractor's performance. The Contractor will apprise the Government of problems, if any, being experienced. The Government and the Contractor shall take appropriate action to resolve outstanding issues. These meetings shall be at no additional cost to the Government.

### 1.5.7 Identification of Contractor Employees

All contractor personnel attending meetings, answering Government telephones, and working in other situations where their contractor status may not be obvious to third parties are required to identify themselves as such to avoid creating an impression in the minds of the audience that they are Government employees. Contractor personnel must also ensure that all documents or reports produced by Contractors are suitably marked as Contractor products or that Contractor participation is appropriately disclosed.

### 1.5.8 Dress Code Policy

Employees working in Joint Staff spaces, particularly in the Pentagon, must adhere to a professional standard in clothing. Business attire is required Monday - Friday.

### 1.5.9 Deliverables

All deliverables become the property of the United States Government. Unless otherwise stated, all deliverables will be submitted in both hardcopy and electronic media in Microsoft Word/PowerPoint/Excel/Access/Visio/Project or Adobe PDF format. All deliverables must be submitted to the COR and the contract specialist in accordance with Technical Exhibit 1, “Performance Requirements Summary”.

# PART 2 DEFINITIONS & ACRONYMS

Administrative Error - a minor error, usually procedural or clerical in nature, and easily corrected.

Contracting Officer Representative (COR) - The Government will identify a COR to assist the Contracting Officer with the technical aspects of the contract.

Defective Service - A service output that does not meet the PWS standard of performance.

Delivery Date – The specific time of delivery and/or performance.

Metrics - A system of parameters or means of quantitative and periodic assessment of a process that is to be measured, along with the procedures to carry out and interpret such measurement and assessment.

Performance Objective – The service and/or activity required.

Performance Requirement – The outcomes, or results, that lead to satisfaction of the objective(s).

Performance Standard – Establishes the performance level that the Government requires for the accomplishment of contract requirements. The standards shall be measurable and structured to permit an assessment of the Contractor's performance.

Performance Threshold – Minimum acceptable level, error rate and/or deviation from standard.

Performance Work Statement (PWS) – A detailed work statement for performance-based acquisitions that describes the required results in clear, specific and objective terms with measurable outcomes.

Quality Control (QC) - Those actions taken to control the performance of services so that they meet the requirements of the PWS.

Quality Control Plan (QCP) - A contractor generated document outlining and describing the performance control processes to be applied in delivering the level of service required by the PWS.

Substantial Error - a serious error requiring immediate attention, thorough investigation, and corrective action.

Task – How the contracting effort fits within the existing or intended customer environment both technically and organizationally; a specific piece of work to be completed within a certain time period.

Wide Area Work Flow (WAWF) – A secure web-based system to allow Contractors to submit electronic invoices and provide the Government a means to electronically receipt for and accept supplies and services.

# PART 3
# GOVERNMENT FURNISHED INFORMATION, FACILITIES, PROPERTY, AND EQUIPMENT

The Government will provide the information, facilities, property, and equipment as outlined below.

The Government will furnish the necessary on-site workspace for the Contractor staff to provide the support outlined in this PWS, except for Automatic Declassification Reviews, to include desk spaces, telephones, computers and other items necessary to maintain an office environment. The Automatic Declassification Reviews will be conducted off-site at the Contractor's Top Secret cleared facility.

Contractor personnel will require access to the Pentagon, NARA, and various other Federal facilities, as appropriate.

The Government will provide telephones and office supplies in conjunction with performance of the contract.

# PART 4
# TASK DESCRIPTIONS

## 4 Task Descriptions

### 4.1 Schedule

#### 4.1.1 Kick-Off Meeting

The Contractor shall schedule and conduct a joint Government and Contractor kick-off meeting to review contract PWS requirements. This meeting shall be scheduled within five (5) working days after contract award and start of each option year.

#### 4.1.2 Project Schedule

The Contractor shall deliver and maintain a project schedule that shows progress achieved by the Contractor on all tasks with specific deliverables.

### 4.2 Overview of Declassification Actions

The Declassification Branch is tasked on average 537 declassification requests annually (136 MDR, 342 FOIA, 29 SR, 27 FRUS and 3 SPR actions) and scheduled to review 560,000 pages annually under the ADR program. The complexity of these actions is determined by the type of request (i.e., record search, review, appeal or litigation, volume of pages to be processed and content of the information). The complexity matrix for FOIA, MDR, FRUS, SR, and SPR actions is below.

Complexity of Actions:

The following are characteristics of high complexity actions. 80% of FOIA, 40% of MDR, 80% of SR, and 40% of FRUS taskers are considered highly complex.

- FOIA and SR litigation actions
- FOIA review and search taskers requiring reviews or searches by more than 2 Joint Staff subject matter experts
- FOIA search taskers that require DISA J6 email searches and DISA J6 finds potentially responsive email records
- FOIA taskers that require searches by the executive assistants to the DJS, VCJCS, or CJCS
- Special Review actions
- FOIA search and review taskers related to personnel investigations and inquiries
- MDR, FRUS, SR review actions containing >100 pages for processing
- FOIA, MDR, FRUS, SR actions containing detainee policy, nuclear deployment policy and/or targeting information, or conventional and nuclear war plans

The following are characteristics of moderately complex actions. 15% of FOIA, 40% of MDR, 10% of SR, and 40% of FRUS taskers are considered moderately complex.

- FOIA, SR, and MDR appeal actions
- FOIA review taskers requiring 1-2 Joint Staff subject matter expert reviews
- FOIA search taskers requiring 1-2 Joint Staff subject matter expert searches
- FOIA search taskers that have responsive records with an SCI classification
- MDR, FRUS, SR review actions containing between 25-99 pages for processing

The following are characteristics of low complexity actions. 5% of FOIA, 20% of MDR, 10% of SR, and 20% of FRUS taskers are considered low complexity.

- MDR search requests resulting in no responsive records
- MDR, FRUS, SR review actions containing between 1-24 pages for processing
- FOIA review taskers that require no Joint Staff subject matter expert reviews FOIA search taskers that require no Joint Staff subject matter expert searches

- FOIA review taskers where only 1-2 Joint Staff subject matter experts are tasked only for their acknowledgment rather than concurrence

### 4.2.1 Quality

#### 4.2.1.1 Quality Control Program (QCP)

The Contractor shall implement a QCP for this effort. To implement this QCP, the Contractor shall prepare and provide a quality control plan to detail and describe the Contractor's framework and processes within the QCP for delivering quality products and services required by this PWS. This quality control plan shall be provided to the Government within 15 days after contract award. The Contractor shall provide a briefing to the Government outlining the plan for implementation of the QCP for the contract tasks during the kick-off meeting. The Contractor shall ensure all work will be performed in accordance with the contract requirements and the quality control plan. The Contractor shall provide the requisite staffing and procedures to meet the quality, quantity, timeliness, responsiveness, customer satisfaction, and service delivery and performance requirements of this effort. The Contractor shall identify in the QCP the applicable processes and metrics used to self-assess performance, in addition to the resources to be applied to this effort.

## 4.3 Technical Deliverables

### 4.3.1 Monthly Progress Reports

The Contractor shall submit monthly progress reports delivered in a format and/or media approved by the COR. Electronic media shall be used whenever practical. The first monthly progress report is due NLT fifteen (15) days after the first full reporting month. Subsequent reports are due NLT five (5) business days after the last day of each calendar month. These reports shall include the following elements:

- Contractor's name and address
- Contract number and CLIN/SubCLIN number
- Date of report
- Period covered by report
- Work-hours expended by discipline for the reporting period, and cumulatively during the contract
- Description of progress made during period reported, including problem areas encountered, and recommendations, if any, for solutions
- Recommendations may include solutions outside the scope of this contract
- Trips and significant results to include travel proposed and travel expended
- Plans and recommendations for activities during the following reporting period
- Problems and shortfalls; identification of potential problems; and identification of any anticipated technical or funding shortfall or irregularity during specified period of performance not later than four (4) months prior to the anticipated shortfall
- ADR section detailing pages reviewed per contract analyst, categorized by declassification action and catalog issues identified during Government QC, including cumulative contract progress by Collection Inclusive End Date (IED) and Collection ID number
- A project schedule, as specified in section 4.1.2.

#### 4.3.1.1 Disclaimer Statement

All reports resulting from this contract/order shall contain the following disclaimer statement on the cover of such reports:

“The views, opinions and findings, contained in this report are those of the author(s) and should not be construed as an official DoD position, policy, or decision, unless so designated by other official documentation."

### 4.3.2 Automatic Declassification Review

The contractor shall conduct 100% two tier review of all permanent classified Joint Staff records eligible for automatic declassification and make the required declassification action(s) in accordance with (IAW) the E.O., applicable statutes, the current Code of Federal Regulations (CFR), and Declassification Branch Standard Operating Procedure (SOP). The contractor shall conduct a page-by-page, line-by-line Initial Review (IR) and make declassification determinations at the document level; and a second-tier review, conducted by a government approved Senior Analyst, to correct or validate all declassification determinations and administrative actions of the

initial review. Each document will be treated as a single unit for the purpose of applying declassification actions- (e.g., referring, exempting, excluding, or permitting automatic declassification); and when necessary complete a Standard Form (SF) 715 to reflect one or more of the listed actions based on the descriptions bellow:

- Exclude: Automatic declassification of records containing Restricted Data (RD), Formerly Restricted Data (FRD), or Critical Nuclear Weapon Design Information (CNWDI) is prohibited. Records marked as such are excluded from the automatic declassification provisions of the E.O. until properly removed by the Department of Energy (DOE) and OSD in the case of FRD. When the proper authorities remove these designations, any remaining information will be processed IAW the E.O.

- Exempt: Joint Staff will exempt from automatic declassification records containing specific information that requires continued protection beyond the automatic declassification date as prescribed by section 3.3 (b) (1) through (9) of the E.O. and the Joint Staff Exemption & Equity Recognition Guide (JSEERG).

- Refer: Records containing information under the Original Classification Authority (OCA) of other Federal agencies or the disclosure of which would affect the interests or activities of the agency and can reasonably be expected to fall under one or more of the exemption categories of the E.O. shall be identified prior to the onset of automatic declassification.

- Permit the automatic declassification and public release of the document (Does NOT require SF715).

Joint Staff maturing permanent records typically include documents produced each year by the Chairman, Joint Chiefs of Staff and the Joint Staff Directorates; are typically hard copy documents; may also include special media records (e.g., microfilm, microfiche, video, audio tapes, and other digital formats); are stored at the Washington National Record Center (WNRC) in Suitland, Maryland. Contractor is responsible for the review of both paper and special media maturing permanent records under this task order.

Eligible record collections with an IED that is 25 years or older from the current year, but no earlier than 4 years from the year of automatic declassification, will be reviewed and returned to a government directed location no later than 31 December of year prior to the year of automatic declassification.

Joint Staff ADRs are currently conducted within two years of declassification date, and the contractor shall maintain or improve this compliance state. Minimum performance requirements for the Contractor shall include: (1) completing the review of records with IED 2003-2007, and (2) commencing the review of records with IED 2008 by the end of Option Period 4. The below table represents the eligible box totals by IED available for ADR over the life of the contract.

| Collection(s) IED (year) | 2003 | 2004 | 2005 | 2006 | 2007 | 2008 |
|---|---|---|---|---|---|---|
| Total Boxes | 98 | 133 | 238 | 133 | 92 | 111 |

The contractor shall be responsible for all logistics and resources necessary to withdraw, transport, review, securely maintain during review (when at contractor facility), and deliver upon completion of review all required Joint Staff records for the duration of the base period and each option period. The contractor shall plan to withdraw the requisite amount of eligible records collections from the WNRC/Pentagon for review at the contractor's facility or at the IMD space in the Pentagon at the discretion of the Government Lead.

The Government may increase funding for the ADR Program up to 30% of the base period and each exercised option period subject to the exercising of other surge CLIN(s) of this contract and available funding.

Based on the schedule for automatic declassification of collections in the custody of Joint Staff and those where Joint Staff is the classification authority, the government has determined the above review schedule is optimum to ensure Federal compliance and inadvertent declassification of National Security Information.

#### 4.3.2.1 Acceptable Quality Level of Reviews

Final reviews submitted for government QC shall maintain a minimum acceptable quality level of no more than one administrative error or misapplication of Joint Staff exemption/other Federal agency guidance per Federal Records Center (FRC) box, and no more than 10% of each record collection being returned for rework. Unacceptable reviews and processing decisions will be returned to the contractor for rework and are described below:

Administrative errors include:

- Incomplete or improperly filled out SF715
- Incomplete or improperly filled out Joint Staff Declassification Review Report (JSDRR)
- Inconsistency or discrepancy of data within ADR digital database/JSDRR/contractor generated deliverables

Misapplication of Joint Staff exemptions include:

- The use of an exemption that improperly protects a document that would otherwise be declassified
- The use of an exemption that improperly protects a document that requires a different declassification action
- The use of an exemption that is improper/inappropriate for the protection of specific topics or subjects

Misapplication of other Federal agency guidance include:

- The referral of a document to agencies when the document would otherwise be declassified
- The referral of a document to agencies where no equity of the referral agency is present

Unacceptable reviews include:

- More than one administrative error
- More than one misapplication of Joint Staff exemption guidance
- More than one misapplication of other Federal agency's guidance
- Failure to identify other agency's equities- to include NATO classified documents
- Failure to identify Joint Staff classified equities
- Failure to identify marked RD/FRD, or other nuclear designations/markings
- Failure to identify ACCM, SCI, Special Access Program (SAP), Special Access Required (SAR), or any other marked documents that require immediate segregation from record collection

The requisite amount of government QC reviews, selected from each contract reviewer at the government's discretion, will expand or contract according to the contract reviewer's demonstrated ability to meet the minimum quality standards for acceptable reviews. Collections with more than 10% of the box total returned for rework shall be 100% re-reviewed at a 0% error standard. Monthly metrics regarding performance and accuracy will be developed and distributed as required. Contract reviewers who fail to maintain the minimum standard for acceptable quality level for two consecutive months may receive remedial training, will rework the noncompliant boxes/collections at no additional cost to the Government, and/or may be removed from the contract.

#### 4.3.2.2 ADR Formal Training Program

The contractor shall develop, implement, and continuously update a formal initial training program for all contract reviewers supporting the Joint Staff ADR program. Training shall be no less than 5 days, shall be formulated with classified Joint Staff material, and representative of current Joint Staff ADR operations. The contractor shall select candidates for Senior Analyst, subject to government approval. The government shall consider the candidates work experience and previous JS work product. The government may, at its discretion, conduct a trial period, not to exceed 1 month, in which the government will review 100% of all boxes completed by the prospective Senior Reviewer. If the trial period is utilized, the government will provide written notification of their approval or disapproval at the end.

To the greatest extent necessary, but on no less than a biannual basis, the contractor will conduct formal training events for all contract reviewers to validate and recertify understanding of necessary aspects of the Joint Staff ADR program and NARA (NARA). Training should be indicative of current operations, take advantage of the access to multiple agencies at NARA, and maximize cross training opportunities. The contractor will report all such activities within their monthly progress report, per section 4.3.1.

**4.3.3 Review of Referral Records Material** The contractor shall conduct a page-by-page, line-by-line review of all referral records material assigned to Joint Staff, and take the prescribed action as described in section 4.3.2 and approved by the Government lead. Each document will be treated as a single unit for the purpose of applying declassification actions as described in section 4.3.2 and approved by the Government lead.

The types of records typically referred to Joint Staff are comparable to the Joint Staff permanent records described in section 4.3.2. The review of records referred to Joint Staff may be performed in the IMD space located in the Pentagon, and/or at offsite facilities

within the National Capital Region (NCR) as specified in the subtasks of this section. The location of the review effort may change or be sustained at more than one location throughout the base period and option periods. Contract reviewers must be able to shift work locations according to fluctuating work levels identified by the Government lead to meet support requirements in the following sections.

The contractor will review no less than 25,000 pages of aggregate referral records material every month- totaling 300,000 pages annually for the duration of the base period and each option period. The contractor shall review all Interagency Referral Center (IRC) assigned Joint Staff referral records within the 60 days cycle, complete all assigned reviews of Joint Staff referral records within the specified suspense date, and review no less than 25,000 pages per cycle or 150,000 pages annually for the duration of the base period and each option period. No more than 13,000 pages derived from referral record material not directly referred to or originated by the Joint Staff will be counted as a part of the production requirement total per month, but pages derived from secondary referrals to Joint Staff/Combatant Command or special media may be counted towards the production requirement.

The Government may increase the production requirement by up to 30% of referral record material reviewed during the base period and each option period - subject to exercising of surge CLIN(s) and to available funding.

Based on previous schedules of Joint Staff referral collections and those where Joint Staff has review authority, the government has determined the above production requirement is optimum to ensure compliance with the E.O. and inadvertent declassification of National Security Information.

#### 4.3.3.1 NARA, College Park, MD

The contractor authorized per the E.O. 13526 Section 3.7.(c)(2) to conduct a page-by-page, line-by-line review as described in section 4.3.2., and exempt or declassify information originated by their agency contained in records accessioned into the National Archives, after consultation with subject-matter experts as necessary. Reviews will consist of referral records identified by the NDC or other Federal agencies where Joint Staff is the Original Classification Authority or when Joint Staff is authorized to conduct a declassification review.

The number of documents/collections tasked for review at NARA facilities are determined by a work plan generated by NARA and may fluctuate from single documents to very large record collections. The Government lead will coordinate with NARA personnel to determine the workload and establish review priorities.

#### 4.3.3.2 National Declassification Center Support for Kyl Lott amendment Reviews and Evaluation Team Reviews

The NDC operates and is administered by the Archivist of the United States. The NDC centralizes each of the Federal Government's automatic declassification efforts in one location to facilitate the prioritization of reviews, standardization of procedures, improvement in equity training, and promote the declassification and public release of historically relevant records.

The contractor shall review Joint Staff referral record material at NARA II when identified for review by NDC staff and approved through coordination with the Government lead. The contractor will participate in review activities associated with the Kyl-Lott Amendment and Archivist directed Evaluation Team reviews approved the Government lead. The contractor shall conduct declassification reviews in compliance with all established NDC policies and procedures.

#### 4.3.3.3 Interagency Referral Center Support

The IRC is an automated centralized referral notification system that triggers the record review process by coordinating referral records between participating Federal agencies. IRC policy requires Federal agencies to complete the review of referral records within a specified suspense date. Federal agencies will surrender their right to exempt record material in the IRC if the review suspense date is not met. The number of pages referred to the Joint Staff through the IRC is determined by NARA and may vary widely each month. An average of 25,000 pages of referrals to Joint Staff are available for review each 60-day cycle at the IRC.

### 4.3.4 Freedom of Information Act (FOIA) Review Support

Contractor reviewers shall conduct a line-by-line review at the document level in accordance with the provisions of the Freedom of Information Act of 1966 (5 U.S.C. § 552), 32 CFR Part 286, E.O. 13526 Classified National Security Information, DoDM 5400.07 DoD FOIA Program, JSI 5713.01F Joint Staff FOIA Program, Joint Staff Declassification Branch Instructions for the Use of FOIA (b)(5) and Writing a Foreseeable Harm Statement, Joint Staff Declassification Branch Instructions for Handwriting Redactions, and other applicable Joint Staff issued instructions/directives and external agency guidance. Upon receipt, the contract reviewers will be

tasked actions and expected to meet suspense dates based on the priority and complexity of the FOIA tasker. The contractor shall review and process FOIA actions in accordance with current guidance issued and promulgated by the Department of Justice, OSD, and the Joint Staff.

The contractor shall complete the following required tasks for each type of FOIA search or review action as specified in the Declassification Branch SOP.

**Contractor Responsibilities:**

a. **Processing and Tasking.** For each FOIA tasker, determine whether the task requires a search or a review. Create an action processing package in accordance with applicable Joint Staff and Declassification Branch SOPs.

b. **No Equity and In-House Determinations.** Determine if the Joint Staff has equity in a tasker, or if an in-house review is appropriate per the SOP. Contractor shall make such determinations within 10 business days of receipt and notify the Government. The contractor is not authorized to communicate pre-coordination request determinations to OSD.

c. **Action Preparation and Coordination.** Determine which Joint Directorate office(s) have equity. Once identified, the contractor will prepare the action for the Joint Directorate subject-matter-expert (SMEs) to review and/or search and coordinate delivery of tasker package per the SOP. For FOIA search taskers, the contractor will search NIPR/SIPR systems, JWICS, and when needed coordinate with the Records and Research Branch. Also identify other federal agencies that FOIA searches should be sent to for additional search or review.

d. **External Communications.** Respond to queries from OSD on the status and estimated completion date of FOIA taskers and requests for missing documents.

e. **SME Support.** Provide Joint Directorate SMEs guidance/instruction on action processing when requested or required. If there is a dispute, or no response from a SME, contractor shall escalate the tasker to a Government FOIA Program Lead.

f. **Legal Review.** Coordinate each FOIA package with OCJCS/Legal Counsel. Incorporate changes as requested by OCJCS/Legal Counsel.

g. **Finalize Analysis and Submit to Government.** Evaluate Joint Directorate responses and, if necessary, re-task or contact the SME; consolidate proposed redactions and identify/reconcile any inconsistencies; verify that all cited exemptions comply with the FOIA, the JSEERG/EO, and OSD/JS FOIA program policies; recommend any necessary referrals to other agencies; confirm that a background search of JS records has been conducted. Ensure that all applicable documents/supporting notes are uploaded to the action processing system per the Declassification Branch SOP.

h. **Tasker Corrections.** Ensure tasking packages sent back to the contractor, after government quality control review, are free of inconsistencies, errors, and addresses the government's requested changes prior to resubmission to the government.

i. **Finalize Package.** Complete tasker in the action processing system and submit the Joint Staff response with applicable documents/forms to OSD.

The procedure above may change as the SOP for FOIA processing is modified to incorporate improvements.

The contractor shall submit for approval a total of no fewer than 420 FOIA cases annually for the duration of the base period and each option period thereafter. If the contractor is not projected to achieve this requirement after six months from the start of each period of performance, the contractor shall, within fourteen (14) days of notification by the COR, submit a corrective action plan outlining specific improvements for government review and approval. Based on previous productivity the government has determined the above range is the optimum amount to ensure quality and quantity.

The Government may increase funding for the FOIA Program up to 30% of the base period and each exercised option period subject to the exercising of other surge CLIN(s) of this contract and available funding.

#### 4.3.4.1 Acceptable Quality Level of Reviews

There shall be no substantial errors and no more than 2 administrative errors per month.

Substantial errors include:

- Uploading Top Secret, ACCM, RD/FRD, NATO, SCI, or sensitive Privacy Act information to the action processing system
- Listing incorrect overall release determination on the Form 472 or action processing system

- Citing incorrect Joint Staff or OSD case numbers on the Form 472
- Failure to redact Joint Staff information deemed classified per the JSEERG
- Failure to redact Joint Staff information protected by statute
- Inconsistencies in redactions throughout the document for review
- Failure to coordinate with OCJCS/Legal Counsel prior to submitting action for approval

Administrative errors include:

- Tasker Response submitted for government approval fails to explain irregularities or inconsistencies
- Citing incorrect FOIA exemption, E.O. 13526 exemption, or statute on the document for review or Form 472
- Failure to cite the FOIA exemption, E.O. 13526 exemption, or statute for each withholding on the document for review
- Failure to redact personal privacy information for Joint Staff personnel with a rank of O-6/GS-15 or lower
- Failure to identify equities of other federal agencies and not listing those agencies on the Form 472 and failure to list other federal agencies that need to conduct additional searches
- Submitting an incomplete Form 472
- Failure to add the correct initial denial authority to the signature block on the Form 472
- Failure to complete the Form 2086
- Recommending redaction of meaningful and reasonably segregable unclassified information
- Failure to coordinate searches or reviews with all applicable Joint Directorate offices
- Written communications contain grammatical or spelling errors
- Uploading tasker note or tasker instructions to the action processing system with grammatical, formatting, or spelling errors
- Failure to upload all required and supporting documents to the action processing system
- Including duplicate email records as responsive records for FOIA search tasker responses

Government FOIA Program Leads will conduct quality control review of 100% of all FOIA actions. Contract reviewers who have substantial errors or 2 administrative errors per month for two consecutive months may be required to complete remedial training at no additional cost to the Government and may be removed from the contract at the discretion of the Government.

The Government may increase funding for the FOIA Program up to 30% of the base period and each exercised option period subject to the exercising of other surge CLIN(s) of this contract and available funding.

#### 4.3.5 Mandatory Declassification Review (MDR) Support

Contractor reviewers shall conduct line-by-line reviews at the document level in accordance with E.O. 13526 Classified National Security Information, DoDM 5230.30 DoD Mandatory Declassification Review Program, DoDM 2500.01 Volume I DoD Information Security Program Overview: Classification and Declassification, DoDM 5400.07 DoD FOIA Program, (5 U.S.C. § 552), Code of Federal Regulations Title 32 Part 2001 and 32 CFR Part 2004, and applicable Joint Staff issued instructions/directives, and external agency guidance. The contractor shall process MDR actions in accordance with guidance issued by the Department of Justice, OSD, and the Joint Staff.

The contractor shall complete the following required tasks for each MDR action to include initial review, initial search, appellate, expedited, and ISCAP appeal reviews as specified in the Joint Staff Declassification Branch SOP:

**Contractor Responsibilities**:

a. **Processing and Tasking.** Determine whether the task requires a search or a review. The contractor will then create an action processing package in accordance with applicable Joint Staff and Declassification Branch SOPs.

b. **No Equity and In-House Determinations.** Determine if the Joint Staff has equity in a tasker, or if an In-house review is appropriate per the SOP. Contractor shall make such determinations within 10 business days of receipt and notify the Government. The contractor is not authorized to communicate pre-coordination request determinations to OSD.

c. **Action Package Preparation and Coordination.** Determine which Joint Directorate(s) have equity. Once identified, the contractor will prepare the package for the SMEs to review and/or search and coordinate delivery of tasker package per the SOP. For MDR search taskers, the contractor will search NIPR/SIPR systems, JWICS, the Joint Staff archive, and when needed coordinate with the Records and Research Branch.

d. **External Communications.** Respond to queries from OSD on the status and estimated completion date of MDR taskers and

requests for missing documents.

e. **SME Support.** Provide guidance and instruction on action processing to Joint Directorate SMEs when requested or required. If a dispute arises, or SME does not respond to tasker, contractor will escalate the tasker to the Government MDR Program Lead.

f. **Finalize Analysis and Submit to Government.** Responsible for ensuring the quality of each package submitted for government approval. To meet this responsibility, the contractor must: evaluate Joint Directorate responses and, if necessary, re-task or contact the SME; consolidate proposed redactions and identify/reconcile any inconsistencies; verify that all cited exemptions comply with the JSSERG/EO; recommend any necessary referrals to other agencies; confirm that a background search of JS records has been conducted; ensure that all applicable documents/supporting notes are uploaded to the action processing system per the Declassification Branch SOP.

g. **Tasker Corrections.** When the Government disapproves a package and returns it to the contractor due to errors or questions concerning redaction decisions, the contractor is responsible for correcting all identified issues before resubmission.

h. **Finalize Package.** Complete tasker in the action processing system and submit the Joint Staff response with applicable documents/forms to OSD.

The procedure above may change as the SOP for MDR processing is modified to incorporate improvements.

The contractor shall submit for approval no fewer than 200 MDR cases annually for the duration of the base period and each option period thereafter. If the contractor is not projected to achieve this requirement after six months from the start of each period of performance, the contractor shall, within fourteen (14) days of notification by the COR, submit a corrective action plan outlining specific improvements for government review and approval. Based on previous productivity the government has determined the above range is the optimum amount to ensure quality and quantity.

The Government may increase funding for the MDR Program up to 30% of the base period and each exercised option period subject to the exercising of other surge CLIN(s) of this contract and available funding.

#### 4.3.5.1 Acceptable Quality Level of Reviews

There shall be no substantial errors and no more than 2 administrative errors per month.

Substantial errors include:

- Typographical errors in Joint Staff or OSD case number on the Form 472
- Improper selection, or omission, of overall release determination on the Form 472
- Failure to mark Joint Staff classified information protected by an exemption in the JSEERG and for which there is a foreseeable harm in release
- Failure to mark Joint Staff information protected by Statute
- Failure to transfer Joint Directorate redactions to the document for review
- Spillage incident(s) arising from the introduction of Top Secret, Special Handling, SCI, or sensitive Privacy Act information to the action processing system
- Inconsistent application of redactions throughout the document for review

Administrative errors include:

- Improper citation, or omission, of E.O. 13526 exemption(s) or Statute on the document for review and/or Form 472
- Failure to identify the equities of other federal agencies; omission of those agencies from Form 472; and failure to list other federal agencies that need to conduct additional searches
- Failure to inform Joint Directorates of prior or concurrent reviews by other Agencies
- Submissions for Government Approval are considered deficient if:
  - Contractor fails to explain irregularities or important details that would assist the Government in approval notes
  - Form 472 has incorrect information (e.g., wrong subject, classification, document date, number of pages, page total)
  - Form 472 is missing Contractor digital signature, omits or misspells the name/title of Declassification Branch or IMD Chief (for appellate actions) in the signature block
  - The final version of the review document has improper exemptions, improper JSEERG citations, or untidy application of redactions on digital or hard copy records
- Failure to coordinate with all Joint Directorate equity holders
- Written communications contain grammatical or spelling errors
- Failure to proof-read tasking notes and approval notes for grammar or spelling errors in the action processing system

- Failure to upload all necessary documents in the Original Documents, Supporting Documents, or Final Documents library of the action processing system

The Government MDR Program Lead will conduct a quality control review of 100% of all MDR actions. Contract reviewers who have substantial errors or 2 administrative errors per month for two consecutive months may be required to complete remedial training at no additional cost to the Government and may be removed from the contract at the discretion of the Government.

#### 4.3.6 Foreign Relations of the United States (FRUS) Support

Contract reviewers shall conduct a line-by-line review at the document level in accordance with the provisions of 22 U.S.C. § 4351, E.O. 13526 Classified National Security Information, applicable Joint Staff issued classification/declassification guidance, instructions, directives, external agency guidance, and statutes. The contract reviewers will be tasked actions and expected to meet suspense dates based on the priority and complexity of the FRUS tasker.

The contractor shall complete the following required tasks for each type of FRUS action as specified in the Joint Staff Declassification Branch SOP.

**Contractor Responsibilities**:

a. **Processing and Tasking.** Create an action processing package in accordance with applicable Joint Staff and Declassification Branch SOPs.

b. **No Equity and In-House Determinations.** Determine if the Joint Staff has equity in a tasker, or if an in-house review is appropriate per the SOP. Contractor shall make such determinations within 10 business days of receipt and notify the Government. The contractor is not authorized to communicate pre-coordination request determinations to OSD.

c. **Action Preparation and Coordination.** Determine which Joint Directorate office(s) have equity. Once identified, the contractor will prepare the action for the SMEs to review and coordinate delivery of tasker package per the SOP. Also identify other federal agencies that FRUS searches should be sent to for additional review.

d. **External Communications.** Respond to queries from OSD on the status and estimated completion date of FRUS taskers and requests for missing documents.

e. **SME Support.** Provide Joint Directorate SMEs guidance/instruction on action processing when requested or required. If there is a dispute, or no response from a SME, contractor shall escalate the tasker to Government FRUS Program Lead.

f. **Finalize Analysis and Submit to Government.** Evaluate Joint Directorate responses and, if necessary, re-task or contact the SME; consolidate proposed redactions and identify/reconcile any inconsistencies; verify that all cited exemptions comply with the JSEERG/EO, and OSD/JS FRUS program policies; recommend any necessary referrals to other agencies; confirm that a background search of JS records has been conducted. Ensure that all applicable documents/supporting notes are uploaded to the action processing system per the Declassification Branch SOP.

g. **Tasker Corrections.** Ensure tasking packages sent back to the contractor, after government quality control review, are free of inconsistencies, errors, and addresses the government's requested changes prior to resubmission to the government.

h. **Finalize package.** Complete tasker in the action processing system and submit the Joint Staff response with applicable documents/forms to OSD.

The procedure above may change as the SOP for FRUS processing is modified to incorporate improvements.

A total of no fewer than 100 FRUS cases shall be submitted annually for the duration of the base period and each option period. If the contractor is not projected to achieve this requirement after six months from the start of each period of performance, the contractor shall, within fourteen (14) days of notification by the COR, submit a corrective action plan outlining specific improvements for government review and approval. Based on previous productivity the government has determined the above range is the optimum amount to ensure quality and quantity.

The Government may increase funding for the FRUS Program up to 30% of the base period and each exercised option period subject to the exercising of other surge CLIN(s) of this contract and available funding.

#### 4.3.6.1 Acceptable Quality Level of Reviews

There shall be no substantial errors and no more than 2 administrative errors per month.

Substantial errors include:

- Incorrect overall release determination or Joint Staff/OSD case numbers on the Form 472
- Failure to mark for exemption Joint Staff classified information that is protected by an exemption in the JSEERG and for which there is a foreseeable harm in release
- Failure to mark for exemption Joint Staff information protected by Statute
- Failure to transfer Joint Directorate recommended redactions to the document for review
- Uploading Top Secret, ACCM, RD/FRD, NATO, SCI, or sensitive Privacy Act information to the action processing system
- Citing the wrong Joint Staff or OSD case number on the Form 472
- Inconsistencies in redactions throughout the document for review

Administrative errors include:

- Tasker Response submitted for government approval fails to explain irregularities or inconsistencies
- Improper citation, or omission, of E.O. 13526 exemption(s) or Statute on the document for review and/or Form 472.
- Failure to redact personal privacy information for Joint Staff personnel with a rank of O-6/GS-15 or lower
- Failure to identify equities of other federal agencies and not listing those agencies on the Form 472 and failure to list other federal agencies that need to conduct additional searches
- Submitting an incomplete Form 472
- Failure to add the correct initial denial authority to the signature block on the Form 472
- Recommending redaction of meaningful and reasonably segregable unclassified information
- Failure to coordinate searches or reviews with all applicable Joint Directorate offices
- Written communications contain grammatical or spelling errors.
- Uploading tasker note or tasker instructions to the action processing system with grammatical, formatting, or spelling errors
- Failure to upload all required and supporting documents to the action processing system

The Government FRUS Program Lead will conduct a quality control review of 100% of all FRUS actions. Contract reviewers who have substantial errors or 2 administrative errors per month for two consecutive months may be required to complete remedial training at no additional cost to the Government and may be removed from the contract at the discretion of the Government.

### 4.3.7 Prepublication and Security Review (SR) Support

The Contractor shall conduct the security and policy prepublication reviews IAW DoDI 5230.09 Clearance of DoD Information for Public Release, DoDI 5230.29 Security and Policy Review of DoD Information for Public Release, JSI 5745.01 Prepublication and Security Review Program, E.O. 13526, and JS issued declassification guidance and SOP. These reviews are for clearance of official DoD information proposed for official public release by the DoD, its employees (military and civilian), or private citizens bound by agreements stipulating they submit material for prepublication review. The contractor may be required to generate a draft damage assessment for SR referrals when requested by OSD.

The contractor shall complete the following required tasks for each type of SR action as specified in the Joint Staff Declassification Branch SOP.

**Contractor Responsibilities**:

a. **Processing and Tasking.** Create an action processing package in accordance with applicable Joint Staff and Declassification Branch SOPs.

b. **No Equity and In-House Determinations.** Determine if the Joint Staff has equity in a tasker, or if an in-house review is appropriate per the SOP. Contractor shall make such determinations within 10 business days of receipt and notify the Government. The contractor is not authorized to communicate pre-coordination request determinations to OSD.

c. **Action Preparation and Coordination.** Determine which Joint Directorate office(s) have equity. Once identified, the contractor will prepare the action for the SMEs to review and coordinate delivery of tasker package per the SOP. Also identify other federal

agencies that SR taskers should be sent to for additional review. Submit coordination to Public Affairs as required.

d. **External Communications.** Respond to queries from OSD on the status and estimated completion date of SR taskers and requests for missing documents.

e. **SME Support.** Provide Joint Directorate SMEs guidance/instruction on action processing when requested or required. If there is a dispute, or no response from a SME, contractor shall escalate the tasker to Government SR Program Lead.

f. **Finalize Analysis and Submit to Government.** Evaluate Joint Directorate responses and, if necessary, re-task or contact the SME; consolidate proposed redactions and identify/reconcile any inconsistencies; verify that all cited exemptions comply with the JSEERG/EO, and OSD/JS SR program policies; recommend any necessary referrals to other agencies; confirm that a background search of JS records has been conducted. Ensure that all applicable documents/supporting notes are uploaded to the action processing system per the Declassification Branch SOP.

g. **Tasker Corrections**. Ensure tasking packages sent back to the contractor, after government quality control review, are free of inconsistencies, errors, and addresses the government's requested changes prior to resubmission to the government.

h. **Finalize package**. Complete tasker in the action processing system and submit the Joint Staff response with applicable documents/forms to OSD.

The procedure above may change as the SR SOP is modified to incorporate improvements.

A total of no fewer than 60 SR cases shall be submitted annually for the duration of the base period and each option period. If the contractor is not projected to achieve this requirement after six months from the start of each period of performance, the contractor shall, within fourteen (14) days of notification by the COR, submit a corrective action plan outlining specific improvements for government review and approval. Based on previous productivity the government has determined the above range is the optimum amount to ensure quality and quantity.

The Government may increase funding for the SR Program up to 30% of the base period and each exercised option period subject to the exercising of other surge CLIN(s) of this contract and available funding.

#### 4.3.7.1 Acceptable Quality Level of Reviews

There shall be no substantial errors and no more than 2 administrative errors per month.

Substantial Errors include:

- Citing incorrect overall release determination on the Form 373
- Failure to transfer Joint Directorate recommended withholdings to the document for review
- Failure to mark for withholding Joint Staff information protected by Statute
- Uploading documents to the action processing system suspected of containing Top Secret, Special Handling, SCI, or sensitive Privacy Act information
- Inconsistencies in recommended withholdings throughout the document for review

Administrative errors include:

- Failure to cite the SCG citation or Statute on the document for review or Form 373
- Failure to identify equities of other federal agencies and not listing those agencies on the Form 373
- Submitting an incomplete Form 373 for approval
- Failure to coordinate reviews with all Joint Directorate office equity holders, including an information only coordination to Public Affairs
- Grammar, formatting, or spelling errors in outgoing notes to Joint Directorates or approval notes submitted in the action processing system
- Failure to upload all necessary documents in the Original Documents, Supporting Documents, or Final Documents library of the action processing system
- Failure to explain any irregularities or important details that would assist the Government approvers
- Written communications contain grammatical or spelling errors

The Government SR Program Lead will conduct a quality control review of 100% of all SR actions. Contract reviewers who have substantial errors or 2 administrative errors per month for two consecutive months may be required to complete remedial training at no additional cost to the Government and may be removed from the contract at the discretion of the Government.

#### 4.3.8 Administrative Support

The Contractor shall provide administrative support to the Information Management Division Declassification Branch.

The Contractor shall provide a wide variety of secretarial/administrative support to include, but not limited to the following duties:

a. Prepare hard copy packages for courier services
b. Sign for incoming hard copy packages from OSD
c. Initiate/prepare Action Processing System packages for search/review
d. Respond to OSD queries regarding referral status, estimated completion dates, and missing document requests by close of the following business day
e. Prepare and provide responses for OSD reconciliation list
f. Provide recommended responses with rationale to Program Leads for OSD pre-coordination requests by close of the following business day
g. Prepare and send monthly open/close status reports to OSD for each process
h. Conduct annual FOIA and MDR reports
i. Assist with internal FOIA and MDR document searches
j. Provide escorts for non-cleared visitors to IMD workspaces
k. Conduct burn bag operations
l. Update and maintain ADR database
m. Analyze ADR boxes to extract and compile all requisite data

The Government may increase funding for Administrative Support up to 30% of the base period and each exercised option period - subject to the exercising of other surge CLIN(s) of this contract and available funding.

#### 4.3.9 Special Review (SPR) Support

Contract reviewers shall conduct a line-by-line review at the document level in accordance with the provisions of the E.O., applicable Joint Staff instructions, directives, classification guides and external agency guidance and statutes. SPR requests are high-level, short suspense, declassification actions originating from members of Congress, the DoD Office of General Counsel, and other external agencies. SPR requests typically involve current events and are expected to receive media attention upon declassification and release to the public. The volume of SPR varies significantly and is driven by current events and Congressional focus. The Declassification Branch typically receives three large and complex SPR requests a year.

The Government may increase funding for Special Review Support up to 30% of the base period and each exercised option period - subject to the exercising of other surge CLIN(s) of this contract and available funding.

##### 4.3.9.1 Acceptable Quality Level of Reviews

Due to the high-level sensitivity of SPRs the Government lead will conduct a 100% quality assurance review for each action completed by the contract reviewers. Monthly metrics regarding performance and accuracy will be developed and distributed as required.

#### 4.3.10 Interagency Referral Center Notifications (IRCN)

The Interagency Referral Center Notifications (IRCN) system is an automated referral notification system for agencies reviewing and processing historical records in accordance with the E.O. The contractor shall maintain an active account with IRCN and shall ensure Joint Staff acknowledges receipt of system generated referral notifications within the permitted time. The contractor shall receive applicable system training sponsored by the National Declassification Center.

#### 4.3.11 Records Management Support

Contractor shall provide focused Records Management (RM) support for record collections under the purview of the Information Management Division. All support shall be provided in accordance with procedures and policies of the IMD Records and Research Branch and shall be provided only when requested by the COR. Support shall include verifying accurate and comprehensive application of the SF 715 and Joint Staff box summary sheets. Additional support shall include accurate generation of indexes for submittal to NARA at the document level of records reviewed by the Branch under the provisions of the E.O. and processing E-Discovery searches in support of ongoing legal proceedings. Contractor shall provide support with preparing boxes for transportation and accessioning to NARA. Contractor shall also provide additional records processing and quality assurance services as required to

support IMD modernization goals and NARA RM requirements.

#### 4.3.12 Report Generation

Contractor shall generate timely, accurate and comprehensive reports concerning records reviewed by the Declassification Branch as tasked by the COR. Reports are typically extrapolated from Declassification Branch maintained databases. This includes generating reports of individual or multiple actions as requested by a Program Lead, the Declassification Branch Chief, or the IMD Chief.

#### 4.3.13 Database Management

Contractor shall maintain, update and ensure accuracy of Declassification Branch databases. Support shall include the Automatic Declassification metrics database. Contractor shall provide support for future databases developed for the Declassification Branch if required.

#### 4.3.14 Action Archiving Support

Contractor shall archive completed declassification actions into Joint Staff electronic archiving repository within 5 business days of receipt. Completed actions will be forwarded to the contractor through the action processing system. Archiving shall be in accordance with established Declassification Branch SOPs and shall be consistent with applicable Joint Staff policy, procedures and directives.

#### 4.3.15 Acceptable Quality Level of Archiving Actions

The contractor shall maintain a minimum 99% acceptable quality level in the archiving of declassification actions for the duration of the base period and each option period. Unacceptable archiving actions include:

- Incorrect overall classification/declassification instructions.
- Inaccurate metadata fields.
- Incorrect document subjects and titles.
- Incorrect or incomplete descriptive fields.
- Incorrect dates.

Monthly metrics regarding performance and accuracy will be developed and distributed as required. The contractor shall maintain a minimum 99% acceptable quality level for archived actions. Contractor personnel who fail to maintain a 99% acceptable quality level for two consecutive months may receive remedial training, rework archive actions at no charge to the Government and may be removed from the contract.

#### 4.3.16 Transportation

The contractor shall provide support in the transport of boxes of record material from storage locations in the NCR.

#### 4.3.17 CLINs

CLINs will support the following:

CLINs 1000 through 1003: Labor (Technical and Administrative support services in accordance with the PWS Tasks 4.3.2 through 4.3.15)

CLINs 1500 through 1503: Surge Labor (Surge for Tasks 4.3.2 through 4.3.15 - subject to exercise and available funding)

# Labor Categories Descriptions

**On-Site Project Manager**

Minimum Qualifications:

- Experience Requirements (must meet one of the following)
    a) At least 5 years of experience managing federal contracts and 5 years of DoD experience in the management and performance of all PWS tasks (experience may be concurrent); OR
    b) At least 4 years' experience performing PWS tasks within the Joint Staff Declassification Branch, and at least 1 year experience in a position where managing personnel was a substantial part of the regular job duties. Must have completed contractor provided management training within the past year.
- Must possess a final and fully adjudicated Top Secret clearance
- Must possess a minimum of a bachelor's degree in the Social Sciences. Analysts with a degree in other disciplines (or without a bachelor's degree but having considerable professional/military experience) may be accepted based on documented declassification work experience subject to Joint Staff concurrence.
- Accredited Project Management Professional certification required

**NARA Support Analyst**

Minimum Qualifications:

- Must possess 7 years of experience conducting declassification reviews of DoD records
- Must possess a final and fully adjudicated Top Secret clearance with SCI eligibility
- Must possess a minimum of a bachelor's degree in the Social Sciences. Analysts with a degree in other disciplines (or without a bachelor's degree but having considerable professional/military experience) may be accepted based on documented declassification work experience subject to Joint Staff concurrence.
- Must possess and demonstrate an expert understanding of Executive Order 13526, declassification criteria, Interagency Referral Center processes and procedures, and knowledge of Joint Staff structure, missions, history, and equities
- Must have completed the Department of Energy's Historical Records and Restricted Data Reviewer course

**Senior Analyst**

Minimum Qualifications:

- Experience Requirements (must meet one of the following)
    a) Must possess 5 years of experience conducting DoD declassification reviews in at least two of the following processes: ADR, MDR, FRUS, FOIA, SR, or
    b) Must possess a total of 2 years of experience conducting declassification reviews for the Joint Staff. "Experience" is defined as possessing at least 1 year of experience in each process.
- Must possess a final and fully adjudicated Top Secret clearance with SCI eligibility
- Must possess a minimum of a bachelor's degree in the Social Sciences. Analysts with a degree in other disciplines (or without a bachelor's degree but having considerable professional/military experience) may be accepted based on documented declassification work experience subject to Joint Staff concurrence
- Must possess and demonstrate a thorough understanding of the Executive Order 13526, classification criteria, Freedom of Information Act provisions and a knowledge of Joint Staff structure, mission, history, and equities
- Must have completed the Department of Energy's Historical Records and Restricted Data Reviewer course

**Junior Analyst**

Minimum Qualifications:

- Experience Requirements (must meet one of the following)
    a) Must possess 1 year of experience conducting DoD declassification reviews OR
    b) At least 1 year as an Administrative Support Specialist for the Joint Staff Declassification Branch
- Must possess a final and fully adjudicated Top Secret clearance with SCI eligibility

- Must possess a minimum of a bachelor's degree in the Social Sciences. Analysts with a degree in other disciplines (or without a bachelor's degree but having considerable professional/military experience) may be accepted based on documented declassification work experience subject to Joint Staff concurrence.
- Must possess and demonstrate a thorough understanding of the Executive Order 13526, classification criteria, Freedom of Information Act provisions and a basic knowledge of Joint Staff structure, mission, history, and equities.

**Administrative Support Specialist**

Minimum Qualifications:

- Must be proficient in Microsoft Office and Adobe
- Must possess a final and fully adjudicated Top Secret clearance with SCI eligibility

**Services Contract Reporting**

Services Contract Reporting (SCR) requirements apply to this contract. The contractor shall report required SCR data fields using the SCR section of the System for Award Management (SAM) at following web address: https://sam.gov/SAM/. Reporting inputs will be for the labor executed during the period of performance during each Government fiscal year (FY), which runs October 1 through September 30. While inputs may be reported any time during the FY, all data shall be reported no later than October 31 of each calendar year. Contractors may direct questions to the help desk, linked at https://sam.gov/SAM/.