

Request for Project Proposals



Solicitation Number: MTEC-23-07-WWSDP

“Wounded Warrior Service Dog Program (WWSDP)”

Issued by:
Advanced Technology International (ATI),
MTEC Consortium Manager (CM)
315 Sigma Drive
Summerville, SC 29486
for the
Medical Technology Enterprise Consortium (MTEC)

Request Issue Date: April 5, 2023
Amendment No. 01 Issue Date: April 28, 2023
Amendment No. 02 Issue Date: May 8, 2023
Amendment No. 03 Issue Date: May 12, 2023

Proposal Due Date: May 22, 2023
Noon Eastern Time

Amendment No. 01 does the following:
Extends the proposal due date from May 8, 2023 to May 15, 2023.
Revises Language in Section 2.2 for funding availability
Revises Language in Section 2.6 for Task 2 Offerors

Amendment No. 02 does the following:
Revises Language in Section 2.6 regarding offeror eligibility

**Amendment No. 03 does the following:
Extends the proposal due date from May 15, 2023 to May 22, 2023.**

All other terms and conditions remain unchanged.

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1 Executive Summary

1.1. The Medical Technology Enterprise Consortium

The Medical Technology Enterprise Consortium (MTEC) is an enterprise partnership in collaboration with industry and academia to facilitate research and development activities, in cooperation with the Department of Defense (DoD) U.S. Army Medical Research and Development Command (USAMRDC) and other Government agencies in the biomedical sciences (including but not limited to drugs, biologics, vaccines, medical software and medical devices) to protect, treat and optimize the health and performance of U.S. military personnel. MTEC is a nonprofit corporation with the following principal objectives:

- (a) engage in biomedical research and prototyping;
- (b) exploration of private sector technology opportunities;
- (c) technology transfer; and
- (d) deployment of intellectual property (IP) and follow-on production.

MTEC is a broad and diverse biomedical consortium that includes representatives from large businesses, small businesses, contract research organizations, “nontraditional” defense contractors, academic research institutions and not-for-profit organizations; for more information on the MTEC mission, see the MTEC website at <https://mtec-sc.org/>.

MTEC operates under an Other Transaction Agreement (OTA) for prototype projects with USAMRDC. In accordance with 10 USC 4022, the MTEC OTA enables the Government to carry out prototype projects that are directly relevant to enhancing the mission effectiveness of military personnel and the supporting platforms, systems, components, or materials proposed to be acquired or developed by the Department of Defense, or to improvement of platforms, systems, components, or materials in use by the armed forces. As defined in the DoD OTA Guide dated November 2018, a prototype project addresses a proof of concept, model, reverse engineering to address obsolescence, pilot, novel application of commercial technologies for defense purposes, agile development activity, creation, design, development, demonstration of technical or operational utility, or combinations of the foregoing. A process, including a business process, may be the subject of a prototype project. Although assistance terms are generally not appropriate in OT agreements, ancillary work efforts that are necessary for completion of the prototype project, such as test site training or limited logistics support, may be included in prototype projects. A prototype may be physical, virtual, or conceptual in nature. A prototype project may be fully funded by the DoD, jointly funded by multiple federal agencies, cost-shared, funded in whole or part by third parties, or involve a mutual commitment of resources other than an exchange of funds. Proposed prototype projects should not be exploratory in nature and do require a foundation of preliminary data.

1.2. Purpose

This solicitation, issued by the MTEC Consortium Manager (CM), Advanced Technology International (ATI), represents a Request for Project Proposals (RPP) for MTEC in support of the Uniformed Services University of the Health Sciences (USU). Proposals selected for award as a

result of this RPP will be awarded under the authority of 10 U.S.C. § 4022. Strategic oversight for the award(s) supported by this RPP will be provided by USU.

This RPP **aims to advance and optimize a benchmark for the training and matching of service dogs with disabled service members and veterans** (henceforth referred to as “SM”). This prototype is based on existing federal regulations, industry best practices, and lessons learned from the prior administration of the Wounded Warrior Service Dog Program (WWSDP) at the USU. This RPP focuses on the following two tasks (see Section 3 for details):

- **TASK 1** – Integrator capable of acquiring, collating, and analyzing data for the development of the benchmark.
- **TASK 2** – Performers capable of integrating, testing and evaluating the components of the benchmark related to the training and matching of service dogs and SM.

Offerors shall address only ONE of the Tasks listed above and are limited to a single proposal submission.

2 Administrative Overview

2.1. Request for Project Proposals (RPP)

The following sections describe the formats and requirements for proposal submission. Offerors are instructed to review the proposal submission requirements closely as this RPP is tailored to the needs of the WWSDP and do not follow standard RPP requirements.

Offerors who submit Proposals in response to this RPP should submit by the date on the cover page of this RPP. Proposals may not be considered under this RPP unless received on or before the due date specified on the cover page.

Each MTEC Proposal submitted must be in accordance with the mandatory formats provided in this RPP. Proposals that fail to follow the mandatory formats may be eliminated from the competition during the CM’s preliminary screening stage (see **Section 5 of this RPP** for more details on the Selection process). The Government reserves the right to award Proposals received from this RPP on a follow-on prototype OTA or other stand-alone OTAs as necessary to meet mission requirements.

2.2. Funding Availability and Period of Performance

The U.S. Government (USG) Department of Defense (DoD) USU has approximately \$14.1 million to be made available for awards in Fiscal Year 2023. It is expected that MTEC will make a single award to fund a single qualified Offeror for Task 1 AND fund multiple qualified Offerors for Task 2 of this effort to accomplish the scope of work. The maximum allowable budget requested by Task 1 Offerors is \$2,000,000. The maximum allowable budget requested by each Task 2 Offeror is \$2,000,000. The Government reserves the right to request adjustments to proposed budgets as a condition of award. Award and funding from the Government is contingent upon the availability of federal funds for this program.

The period of performance (PoP) shall not exceed **12 months**.

Past WWSDP recipients **ARE ELIGIBLE** to apply and compete for WWSDP awards through this MTEC RPP. However, please note that this RPP is neither suitable for renewal applications nor supplementation of awards that have been made outside of MTEC.

Note that the Government reserves the right to make final evaluation and award decisions based upon, among other factors, programmatic relevancy and overall best value solutions determined to be in the Government's best interest. This interest includes, but is not limited to, the safety of the service dog, SM, and the public.

2.3. Acquisition Approach

This RPP will be conducted using a modified Enhanced White Paper approach. **In Stage 1, Task 1 Offerors are invited to submit Enhanced White Papers and Task 2 offerors are invited to submit a Task 2 Application Forms (see Section 4.2 of this RPP for description of required documents for submission).** The Government will evaluate all submissions and will select those that represent the best value using the evaluation criteria in **Section 5 of this RPP**.

It is the intent of this program that those Task 2 Offerors that are recommended for award will be required to team with the Task 1 Offeror selected for award, where the Task 1 Offeror will serve as the prime contractor and the multiple Task 2 Offerors will serve as subcontractors.

Upon recommendation for award, the selected **Task 1** Offeror will then be invited to submit a full cost proposal in Stage 2, which incorporates the selected **Task 2** Offerors as subcontractors for award. MTEC will introduce the selected **Task 2** Offerors to the selected **Task 1** Offeror at that time. Notification letters will contain specific Stage 2 proposal submission requirements.

Pending successful completion of the total effort, the Government may issue a non-competitive follow-on production contract or transaction pursuant to 10 U.S.C. § 4022 section f.

The Government-selected prototype project(s) awarded as a result of this solicitation will be funded under the Other Transaction Agreement for prototype projects (OTA) Number W81XWH-15-9-0001 with MTEC administered by the CM, ATI. The CM will negotiate and execute a Base Agreement with the Task 1 Offeror recommended for award (if not yet executed). The same provisions will govern this Base Agreement as the OTA for prototype projects between the Government and MTEC. Subsequently, any proposal that is selected for award will be funded through a Research Project Award (RPA) issued under the member's Base Agreement. The MTEC Base Agreement can be found on the MTEC website (within the Documents Library: <https://www.mtec-sc.org/documents-library/>) and Members-Only website at www.mtec-sc.org.

At the time of the submission, Task 1 Offerors that have not yet executed a Base Agreement must certify on the cover page of their Proposal that, if selected for award, they will abide by the terms and conditions of the latest version of the MTEC Base Agreement. If the Offeror

already has executed an MTEC Base Agreement with the MTEC CM, then the Offeror must state on the cover page of its Proposal that, if selected for award, it anticipates the proposed effort will be funded under its executed MTEC Base Agreement.

2.4. Proposers Conference

MTEC will host a Proposers Conference that will be conducted via virtual webinar within two weeks after the release of the RPP. The intent of the Proposers Conference is to provide an administrative overview of this RPP process and present further insight into the Technical Requirements outlined in **Section 3 of this RPP**. All potential Offerors are strongly encouraged to attend these informational sessions. Further instructions will be forthcoming via email. Offerors are advised to check the MTEC website periodically during the proposal preparation period for any clarifications found in Frequently Asked Questions (FAQ) responses.

2.5. Proprietary Information

The MTEC CM will oversee submission of proposals and analyze cost proposals submitted in response to this RPP. The MTEC CM shall take the necessary steps to protect all proprietary proposal information and shall not use such proprietary information for purposes other than the evaluation of an Offeror's proposal and the subsequent agreement administration if the proposal is selected for award. In accordance with the Proposal Preparation Guide (PPG), **please mark all Confidential or Proprietary information as such**. An Offeror's submission of a proposal under this RPP indicates concurrence with the aforementioned CM responsibilities.

Also, as part of MTEC's mission to incorporate philanthropic donations, MTEC frequently makes contact with private entities (e.g., foundations, investor groups, organizations, individuals) that award grants or otherwise co-fund research, and/or operates in research areas that are aligned with those of MTEC. These private entities may be interested in reviewing certain Proposals within their program areas, allowing opportunities to attract supplemental funding sources. Therefore, on your Proposal Cover Page, please indicate your willingness to allow MTEC Officers and Directors access to your Proposal for the purposes of engaging in outreach activities with these private entities. MTEC Officers and Directors who are granted proposal access have signed Nondisclosure Agreements (NDAs) and Organizational Conflict of Interest (OCI) statements. Additionally, these MTEC Officers and Staff represent organizations that currently are not MTEC members, and therefore their parent organizations are not eligible to submit Proposals or receive any research project funding through MTEC. Additionally, all Technical Evaluation Panel participants, which may include contractor support personnel serving as nongovernmental advisors, will agree to and sign a Federal Employee Participation Agreement or a Nondisclosure/Nonuse Agreement, as applicable.

2.6. Offeror Eligibility

Task 1 and Task 2 offerors must be a nonprofit organization that is subject to 26 U.S.C. 501(c)(3) of the tax code.

TASK 1 Offerors: **Task 1 offerors must be a nonprofit organization that is subject to 26 U.S.C. 501(c)(3) of the tax code.** Task 1 Offerors must be MTEC Members in good standing to be eligible to submit an Enhanced White Paper. Task 1 Offerors submitting Enhanced White Papers as **the Prime Performer must be MTEC members of good standing at least 3 days prior to submission of the Enhanced White Papers.** To join MTEC, please visit <http://mtec-sc.org/how-to-join/>.

TASK 2 Offerors: **MTEC membership is NOT required for the submission of a Proposal in response to Task 2 of this MTEC RPP.** However, to be eligible to receive WWSDP funds, a Task 2 Offeror **is required to:**

- Be a nonprofit organization that is subject to 26 U.S.C. 501(c)(3) of the tax code;
- Have an active registration in the System for Award Management (SAM);
- Submit the required submission documents by the application deadline;
- Have a proven track record of providing service dogs to disabled SM;
- Provide for all daily and medical needs of the canines before placement with a SM;
- Provide all placement and training services at no cost to the SM. Services include, but not limited to, canine acquisition, canine training, canine veterinary costs, canine certifications, canine grooming and care, SM training, SM public access training, travel, and lodging (for up to 14 days). Moreover, SM may not be solicited to participate in any activity to underwrite costs. This prohibition includes donations, loans, fundraising activities, or favorable considerations of any type for the organization.
- Be able to integrate, test, and evaluate benchmark guidelines.

2.7. Cost Sharing Definition

Cost sharing is defined as the resources expended by the award recipients on the proposed Statement of Work / Milestone Payment Schedule. *Cost sharing above the statutory minimum is not required in order to be eligible to receive an award under this RPP.* If cost sharing is proposed, then the Offeror shall state the amount that is being proposed and whether the cost sharing is a cash contribution or an in-kind contribution (see **Addendum 1** for definitions); provide a description of each cost share item proposed; the proposed dollar amount for each cost share item proposed; and the valuation technique used (e.g., vendor quote, historical cost, labor hours and labor rates, number of trips, etc.).

2.8. Cost Sharing Requirements

In order to be compliant with the statute for awarding prototype projects, Research Projects selected for funding under this RPP are required to meet at least one of the conditions specified in **Addendum 2**. Beyond that, cost sharing is encouraged, if possible, as it leads to stronger leveraging of Government-contractor collaboration. For more information regarding cost share, please see **Addendum 1**. Proposals that fail to meet the mandatory statutory conditions with regard to the appropriate use of Other Transaction authority, as detailed in **Addendum 2**, will not be evaluated and will be determined ineligible for award.

Due to the unique nature of this solicitation and acquisition approach, compliance with the requirements detailed in Addendum 2 will be verified prior to execution of award in lieu of a screening process performed at the time of proposal submission.

2.9. MTEC Assessment Fee

Per Section 3.4 of the Consortium Member Agreement (CMA), the **Task 1** recipient of a Research Project Award under the MTEC OTA shall pay MTEC an amount equal to 2% of the total funded value of each research project awarded. Such deposits shall be due no later than 90-days after the Research Project Award is executed. The MTEC Assessment Fee is not allowable as a direct charge to any resulting award or any other contract. Therefore, Offerors shall not include this Assessment Fee as part of their proposed direct costs. Members who have not paid the assessment fee within 90 days of the due date are not “Members in good standing”.

2.10. Intellectual Property and Data Rights

Baseline IP and Data Rights for MTEC Research Project Awards are defined in the terms of an awardee’s Base Agreement and, if applicable, specifically-negotiated terms are finalized in any resultant Research Project Award. MTEC reserves the right to assist in the negotiation of IP, royalties, licensing, future development, etc., between the Government and the individual performers prior to final award decision and during the entire award period.

The Offeror shall comply with the terms and conditions contained in their Base Agreement regarding IP and Data Rights, as modified by the specifically-negotiated IP and Data rights terms herein. **It is anticipated that anything created, developed, or delivered under this proposed effort will be delivered to the Government with Government Purpose Rights or unlimited data rights unless otherwise asserted in the proposal and agreed to by the Government.** Rights in technical data in each Research Project Award shall be determined in accordance with the provisions of MTEC Base Agreement.

See **Addendum 3** for more detail. Note that as part of the Stage 1 of the RPP process (submission of an Enhanced White Paper), **ALL Offerors shall complete and submit Addendum 3 (Intellectual Property and Data Rights) as an appendix to the proposal** with the Signature of the responsible party for the proposing Prime Offeror.

2.11. Expected Award Date

Offerors should plan on the PoP beginning on or about 30 September 2023 (subject to change). The Government reserves the right to change the proposed PoP start date through negotiations via the CM and prior to issuing a Research Project Award.

2.12. Proposal Selection Notification

As the basis of selections is completed, the Government will forward its selections to the MTEC CM to notify all Offerors. All Proposers will be notified by email from the MTEC CM of the results of the evaluation. Those successful will move forward to the next stage of the process.

Offerors are hereby notified that once proposals have been submitted, neither the Government nor the MTEC CM will discuss evaluation/status until after the Offeror receives the formal notification with the results of this evaluation.

3 Technical Requirements

3.1. Background

The Wounded Warrior Service Dog Act of 2013 (H.R. 2847)¹ established a grant program to encourage the matching of disabled SM and service dogs. In 2015, the program was funded using a Defense Health Program appropriation.² Since then, the program has been managed by USU and increased in budget, scope, and outreach. However, USU has identified several challenges in managing the program. Primarily, the service dog industry is unregulated. There are no required standards or outcome measures. The lack of shared guidelines makes it difficult to evaluate the quality of service dog programs because this quality was never defined. Moreover, a lack of guidelines place the safety of canines, SM, and the public at risk.

To combat these challenges, USU has taken the experience that they have had so far and drafted the foundation of a benchmark for the WWSDP. This prototype (refer to **Addendum 4** of this RPP for the Prototype Guidelines) is intended to serve as a starting point for the Awardees to integrate, test, evaluate. This action has urgency as the Defense Health Agency and the United States Department of Veterans Affairs increase funding for service dogs without shared knowledge, standards, or a formal benchmark.

For the purposes of this RPP, the following terms and operational definitions are used:

- Covered Members and Veterans: Any SM who is receiving medical treatment, recuperation, or therapy under [chapter 55](#) of title 10, United States Code; in medical hold or medical holdover status; or covered under section [1202](#) or [1205](#) of title 10, United States Code; or any Veteran who is enrolled in the health care system established under [section 1705\(a\)](#) of title 38, United States Code.
- Disability: A physical, sensory, psychiatric, intellectual, or other mental impairment that substantially limits an individual's major life activities.
- Service dog: Any dog that is individually trained to do work or perform tasks for the benefit of an individual with a disability per 28 C.F.R. §35.104 (does not include emotional support/therapy dogs or facility dogs).
- Service member: Active member of any branch of the U.S. Uniformed Services (Army, Navy, Marine Corps, Air Force, Coast Guard, Space Force, Public Health Service Commissioned Corps, National Oceanic and Atmospheric Administration).
- Sponsor: Government/Uniformed Services University.

¹ <https://www.congress.gov/bill/113th-congress/house-bill/2847/text?q=%7B%22search%22%3A%5B%22Veterans%27%5C%5C%22%2C%22Affairs%7CHealth%22%5D%7D&r=88&s=1> (Retrieved on 27 September 2022)

² <https://www.congress.gov/bill/113th-congress/house-bill/83> (Retrieved on 27 September 2022)

- Veteran: Service member who was discharged or released therefrom under conditions other than dishonorable.

3.2. Solution Requirements

The content of the benchmark to be delivered by this program includes identification of best practices for the service dog industry (e.g., minimum requirements for the selection and training of both dog and SM, facilities conditions, and canine care and medical information), establishment of a baseline to compare service dog organizations, creation of a standard for the purpose of Government funding and research, and establishment of minimum guidelines to protect the wellbeing and safety of our SM, service dogs, and the public.

The Government has identified two tasks for funding to support this effort. Proposals **shall** address only **ONE** of the Tasks outlined below. Offerors are limited to a single proposal submission. These Tasks are not listed in order of importance.

- **TASK 1** – A single integrator capable of acquiring, collating, and analyzing data for the development of the benchmark
- **TASK 2** – Multiple performers capable of testing and evaluating the components of the benchmark related to the training and matching of service dogs and SM

It is the intent of this program that those Task 2 Offerors that are recommended for award will be required to team with the Task 1 Offeror selected for award, where the Task 1 Offeror will serve as the prime contractor and the multiple Task 2 Offerors will serve as subcontractors. This structure will allow for unified network or team working towards a shared goal to support this MTEC WWSDP requirement. All award recipients must safeguard the privacy of SM under the purview of this contract (refer to **Addendum 5** of this RPP – “Privacy Protocols” - for more information).

3.2.1. Task 1 – Integrator capable of acquiring, collating, and analyzing data for the development of the benchmark. This program shall be led by a centralized point of contact (POC), or a single organization that serves as the “Integrator.” It is expected that the Integrator will assist the Government in managing the WWSDP. The Integrator will serve as a link between the Government and the **Task 2** Performers to facilitate the technical, scientific, and program management. The selected Integrator will be ultimately responsible for official communication with **Task 2** Performers and all award deliverables. **Task 1** Offerors are expected to propose a “mini-consortium” type of structure that is comprised of the necessary qualified personnel, facilities, equipment, supplies, services, subcontractors, and related administrative and information technology support to accomplish the Integrator’s objectives. It is preferred that the Integrator have established experience in the acquisition and analysis of data for the purpose of developing best practices and guidelines. The Offeror for **Task 1** shall include the overall Project Management Plan as part of the Enhanced White Paper submission. Furthermore, the Government recognizes that the composition of the team may change as the project

requirements evolve over time. The Offeror shall be prepared to work with MTEC to adjust (i.e. expand) the team, as needed, throughout the period of performance (to include potential follow on efforts). It is encouraged that **Task 1** Offerors demonstrate in their Enhanced White Papers their previous experience providing technical, programmatic, financial, and/or scientific solutions to the Government, and specific experience related to the following areas:

- Functional knowledge of quantitative and qualitative data analysis.
- Experience with psychometric assessments.
- Functional knowledge of federal travel regulations and systems.

The Integrator's role may include (but is not limited to) the following activities:

- Establish an Advisory Committee containing, at minimum, this Government Sponsor Office Technical Representative (SOTR) and a member of USU faculty that will assist with the data collection and analysis as well as perform site visits. The Offeror is encouraged to recommend others that may add value to the Advisory Committee. Final approval of the composition of the Advisory Board will be provided by the SOTR. The Advisory Committee is expected to convene quarterly and on an as-needed basis for off cycle issues through virtual communications.
- Verify that **Task 2** Performers integrate, test, and evaluate the prototype guidelines.
- Manage communications among **Task 2** Performers and USU, including arranging and conducting site visits to the **Task 2** Performers sites.
- Manage the distribution of funds in accordance with the milestones/deliverables identified for each **Task 2** Performer.
- Assist **Task 2** Performers in meeting deliverable deadlines.
- Develop and distribute periodic surveys to **Task 2** Performers to track and evaluate the effectiveness of the prototype benchmark.
- Acquire or develop any necessary questionnaires or additional assessment tools required to evaluate or refine the prototype benchmark.
- Facilitate or conduct associated research activities to articulate best practices.
- Organize at least one focus group meeting for **Task 2** Performers to evaluate and validate the prototype benchmark. This would be a 1-2 day event held at USU in Bethesda, MD with accommodations and travel to and from the event for one member of each of the **Task 2** Performers to be coordinated by the **Task 1** Integrator. This focus group meeting should take place towards the end of the PoP.
- Deliver quarterly reports to USU that summarize data and conclusions from the testing and validation of the prototype benchmark. It is anticipated that the **Task 1** Integrator would work with the government during the PoP to standardize a reporting format for this effort
- Conduct data synthesis to articulate meaningful trends, limitations, and next steps.
- Translate data into actionable information to enable the optimization of prototype guidelines
- In the event that additional funding becomes available for follow-on work, the Government may instruct the Integrator to work solely with MTEC to collect project information papers from **Task 2** Offerors (including organizations not part of the program during the initial 12-month PoP). If the MTEC Request for Project Information (RPI) process is utilized (either for

continued prototype development or for program expansion as follow-on work), the selected Integrator will work with MTEC to draft the necessary RPI. MTEC will use its standard processes to post the RPI and collect the project information paper submissions. USU will evaluate project information papers. All prototype projects will require approval by USU prior to addition to the Integrator's award.

3.2.2. Task 2 – Performers capable of testing and evaluating the prototype benchmark. Multiple service dog organizations will be selected to incorporate the benchmark into their own training of service dogs and disabled SM, and report the test and evaluation data back to the **Task 1** Integrator. **Task 2** Performers shall work with the **Task 1** Integrator, as needed, to meet contract deliverables and requirements.

Each **Task 2** Performer's role includes (but is not limited to) the following activities:

- Host USU officials for scheduled site visits to the Task 2 Performer sites. Each site visit may require 4-6 hours to inspect the facility, handling of dogs, veterinary care, and record keeping. In addition, the site visits afford both the USG and the performing organizations an opportunity to brainstorm best practices, challenges, and opportunities to improve the benchmark. Offerors must include the costs of such a visit, if any, in their proposals.
- Integrate the prototype benchmark into their own training of service dogs and SM with disabilities.
- Assess the level of burden, scope, and practicality of the prototype benchmark.
- Complete periodic surveys to test and evaluate the effectiveness of the benchmark.
- Assist the Integrator (**Task 1** Performer) in articulating best practices to improve dog and SM training and minimize training attrition, which will contribute to the optimization of the benchmark.
- Participate in at least one 1-2 day focus group meetings organized by the Integrator.
- Tabulate and report dog and SM training data to the **Task 1** Integrator (e.g., demographics, hours).

PREFERRED: In addition to the above stated requirements, the Government will consider factors that protect the safety of the service dogs, SM, and the public. The Government will also evaluate the aptitude of Offerors to engage in a robust academic debate related to the benchmark guidelines.

3.3. Potential Follow-on Tasks

There is potential for award of one or more follow-on tasks based on the success of any resultant Research Project Award(s) (subject to change depending upon Government review of work completed). Examples of follow-on work may include studies required to validate and/or optimize the benchmark. Note that any potential follow-on work may be awarded non-competitively to resultant project awardee(s).

3.4. Restrictions on Animal and Human Subjects

Proposals must comply with the following restrictions and reporting requirements for the use of animal and human subjects, to include research involving the secondary use of human biospecimens and/or human data. The Awardee shall ensure local Institutional Animal Care and Use Committee (IACUC) and Institutional Review Board (IRB) approvals, continuing review (in the intervals specified by the local IRB, but at a minimum, annually), and approval by the USAMRDC Office of Human and Animal Research Oversight (OHARO) Office of Human Research Oversight (OHRO). Offerors shall include IRB and OHRO review and approval in the SOW/Milestones Table submitted with the Proposal, as applicable.

Research Involving Humans: All DoD-funded research involving new and ongoing research with human anatomical substances, human subjects, or human cadavers must be reviewed and approved by the USAMRDC OHRO prior to research implementation. This administrative review requirement is in addition to the local IRB or Ethics Committee review. Allow a minimum of 2 to 3 months for OHRO regulatory review and approval processes.

Research Involving Animals: All DoD-funded research involving new and ongoing research with animals must be reviewed and approved by the USAMRDC OHARO Animal Care and Use Review Office (ACURO), in addition to the local Institutional Animal Care and Use Committee (IACUC) of record. Allow at least 3 to 4 months for ACURO regulatory review and approval processes for animal studies.

These restrictions include mandatory Government review and reporting processes that will impact the Offeror's schedule.

The USAMRDC OHRO will issue written approval to begin research under separate notification. Written approval to proceed from the USAMRDC OHRO is also required for any Research Project Awardee (or lower tier subawards) that will use funds from this award to conduct research involving human subjects. Offerors must allow at least 30 days in their schedule for the ORP review and authorization process.

3.5. Guidance Related to DoD-Affiliated Personnel for Participation in research

Please note that compensation to DoD-affiliated personnel for participation in research while on duty is prohibited with some exceptions. For more details, see Department of Defense Instruction (DODI) 3216.02, Protection of Human Subjects and Adherence to Ethical Standards in DoD-Conducted and -Supported Research. You may access a full version of the DODI by accessing this link: <https://www.esd.whs.mil/Portals/54/Documents/DD/issuances/dodi/321602p.pdf>

4 Proposal Preparation

4.1. General Instructions

Proposals should be submitted by the date and time specified on the cover page using BIDS: <https://ati2.acqcenter.com/ATI2/Portal.nsf/Start?ReadForm>. Include the MTEC Solicitation

Number (**MTEC-23-07-WWSDP**) on each proposal submitted. See **Addendum 12** for further information regarding BIDS registration and submission.

The Proposal formats provided in this MTEC RPP are **mandatory** for all Offerors. Please note that this RPP includes proposal templates that are specific to **Task 1** or **Task 2**.

Note that only a **Task 1** Offeror selected for Stage 2 of this effort will be required to submit a Full Cost Proposal, incorporating the selected Task 2 Offerors as subcontractors using the information provided in their submitted Cost Proposals.

Offerors are encouraged to contact the POCs identified herein up until the Proposal due date/time to clarify requirements (both administrative and technical in nature).

All eligible Offerors may submit Proposals for evaluation according to the criteria set forth herein. Offerors are advised that only ATI as the MTEC's CM, with the approval of the DoD Agreements Officer, is legally authorized to contractually bind MTEC into any resultant awards.

4.2. TASK 1 Instructions for the Preparation & Submission of the Stage 1 Proposals

Offerors submitting an Enhanced White Paper, inclusive of a Rough Order of Magnitude cost/price estimate, in response to **Task 1** this RPP shall prepare all documents in accordance with the following instructions:

Offerors should submit files in Microsoft Office formats or Adobe Acrobat (PDF – portable document format) as indicated below. ZIP files and other application formats are not acceptable. All files must be print-capable, searchable, and without a password required. Filenames must contain the appropriate filename extension (.docx, .doc, .pptx, .ppt, .xlsx, .xls or .pdf). Filenames should not contain special characters. Apple users must ensure the entire filename and path are free of spaces and special characters.

An automated BIDS receipt confirmation will be provided by email. Offerors may submit in advance of the deadline. **Neither MTEC nor ATI will make allowances/exceptions for submission problems encountered by the Offeror using system-to-system interfaces. If the Offeror receives errors and fails to upload the full submission prior to the submission deadline, the submission may not be accepted. It is the Offeror's responsibility to ensure a timely and complete submission.**

Required Submission Documents for TASK 1 (4): Submitted via BIDS (5MB or lower per document)

- **Enhanced White Paper:** one PDF document (See **Section 8**)
- **Intellectual Property and Data Rights Assertions:** one Word or PDF document (See **Addendum 3**)
- **Statement of Work (SOW)/Milestone Payment Schedule (MPS):** one Word or PDF document (See **Addendum 6**)

- **Warranties and Representations:** one Word or PDF document (See **Addendum 7**)

Page Limitation: The Enhanced White Paper is limited to ten (10) pages (including cover page). The following Appendices are **excluded** from the page limitation: (1) *Warranties and Representations*, (2) *Statement of Work*, and (3) *Intellectual Property and Data Rights Assertions*.

The Enhanced White Paper and its Appendices must be in 12-point font (or larger), single-spaced, single-sided, 8.5 inches x 11 inches. Smaller type may be used in figures and tables but must be clearly legible. Margins on all sides (top, bottom, left, and right) should be at least 1 inch. **Enhanced White Papers and Appendices exceeding the page limitations and/or the file size specified above may not be accepted.**

Section 8 of this RPP provides additional information related to each of the required documents for the proposal submission. Offerors are encouraged to contact MTEC with any questions so that all aspects are clearly understood by both parties.

FOR INFORMATION ONLY: Please note a full Cost Proposal will be requested if the Enhanced White Paper is recommended for funding (see Section 4.3 for additional details). Additionally, the Government may request additional information in the form of supplementary attachments/appendices (henceforth referred to as supplemental information) to this proposal submission after completion of the technical evaluation to include the following:

- **Human Subject Recruitment and Safety Procedures** which details study population, inclusion/exclusion criteria, description of the recruitment process, description of the informed consent process, etc.
- **Letter(s) of Support**, as applicable, if the prototype project will require access to active-duty military patient populations and/or DoD resource(s) or database(s).

The exact requirements of any such attachment/appendix are subject to change and will be provided at the time (or immediately following) the technical evaluation summary is provided (as part of the Selection Notification described in **Section 2.12 of this RPP**).

4.3. TASK 2 Instructions for the Preparation & Submission of the Stage 1 Proposals

Offerors submitting a Proposal in response to **Task 2** of this RPP shall prepare all documents in accordance with the following instructions. Offerors are encouraged to contact MTEC with any questions so that all aspects are clearly understood by both parties.

Offerors should submit files in Microsoft Office formats or Adobe Acrobat (PDF – portable document format) as indicated below. ZIP files and other application formats are not acceptable. All files must be print-capable, searchable, and without a password required. Filenames must contain the appropriate filename extension (.docx, .doc, .pptx, .ppt, .xlsx, .xls or .pdf). Filenames

should not contain special characters. Apple users must ensure the entire filename and path are free of spaces and special characters.

An automated BIDS receipt confirmation will be provided by email. Offerors may submit in advance of the deadline. **Neither MTEC nor ATI will make allowances/exceptions for submission problems encountered by the Offeror using system-to-system interfaces. If the Offeror receives errors and fails to upload the full submission prior to the submission deadline, the submission may not be accepted. It is the Offeror's responsibility to ensure a timely and complete submission.**

Required Submission Documents for TASK 2 (4): Each document (5MB or lower per document) will be uploaded to BIDS separately (see Addendum 13 of RPP for BIDS instructions).

- **Task 2 Application Form (PMR Form):** one Word or PDF document (See **Addendum 8**). The application form is designed to establish a profile for each applicant. Organizations must complete accurate and contemporary, as opposed to prospective, information.
- **Task 2 Budget Narrative:** one Word or PDF document (See **Addendum 9**). This narrative is designed to justify the requested financial support outlined in the Cost Formats. This justification must explain how funds will be used to integrate, test, and evaluate prototype guidelines (e.g., canine medical requirements, testing, trainer accreditation, home visits, etc.).
- **Task 2 Cost Proposal Format:** one Excel or PDF document (See **Addendum 10**). This form is designed to provide the necessary information for the selected **Task 1** Integrator to submit a full cost proposal.
- **Intellectual Property and Data Rights Assertions:** one Word or PDF document (See **Addendum 3**). The Offeror shall comply with the terms and conditions defined in the Base Agreement regarding Data Rights. It is anticipated that anything delivered under this proposed effort would be delivered to the Government in accordance with Section 2.10 of the RPP unless otherwise asserted in the proposal and agreed to by the Government. If this is not the intent, then you should discuss any restricted data rights associated with any proposed deliverables/milestones. If applicable, complete the table within the referenced attachment for any items to be furnished to the Government with restrictions.

FOR INFORMATION ONLY: Please note, additional attachments/appendices (referred to above as “supplemental information”) to this proposal submission may be requested after completion of the technical evaluation. Examples of such supplemental information are provided in Section 4.2. above. The exact requirements of any such attachment/appendix will be provided at the time (or immediately following) the technical evaluation summary is provided (as part of the Selection Notification described in **Section 2.12 of this RPP**).

4.4. Stage 2: Cost Proposal (for Only Those Offerors Recommended for Funding)

Offerors that are recommended for funding will receive notification letters which will serve as the formal teaming request between the **Task 1** Integrator and **Task 2** Performers. The request

will require the selected **Task 1** Integrator to submit a full Cost Proposal, including all selected **Task 2** Performers as subcontractors. **All Offerors** may receive an additional request at this time for Enhanced White Paper revisions and/or supplemental information, such as those examples listed in the section above, based on the results of the technical evaluation). This request will contain specific submission requirements if there are any changes to those contained in this RPP. However, it is anticipated that the **Task 1 Integrator** will be required to submit:

Required Submission Documents (2): Submit to mtec-contracts@ati.org

- **Section I: Cost Proposal Narrative:** one Word or PDF document
- **Section II: Cost Proposal Format:** one Excel or PDF document

See below for additional instructions. Also refer to **Addendum 11 of this RPP** for details on how the full Stage 2 Cost Proposals will be evaluated.

The selected Task 1 Offeror is encouraged to use their own cost format such that the necessary detail is provided. MTEC will make cost proposal formats available on the Members-Only MTEC website. The Cost Proposal formats provided in the MTEC website and within the PPG are **NOT** mandatory.

Each cost proposal should include direct costs and other necessary components as applicable, for example, fringe, General & Administrative Expense (G&A), Facilities & Administrative (F&A), Other Direct Costs (ODC), etc. Offerors shall provide a breakdown of material and ODC costs as applicable. Refer to the MTEC PPG for additional details.

Those Offerors invited to submit a Cost Proposal are encouraged to contact the MTEC CM and/or Government with any questions so that all aspects of the Stage 2 requirements are clearly understood by both parties.

4.5. Proposal and Cost Proposal Preparation Costs

The cost of preparing Proposals and Cost Proposals in response to this RPP is not allowable as a direct charge to any resulting award or any other contract. Additionally, the MTEC Assessment Fee (see Section 2.9 of this RPP) is not allowable as a direct charge to any resulting award or any other contract.

4.6. Freedom of Information Act (FOIA)

To request protection from FOIA disclosure as allowed by 5 U.S.C. §552, Offerors shall mark business plans and technical information with a legend identifying the documents as being submitted on a confidential basis. For more information, please refer to Section 6.1.1 of the MTEC PPG or contact the POCs identified herein up until the Proposal due date/time to clarify.

4.7. Telecommunications and Video Surveillance

As stated in Section 6.1.2 of the MTEC PPG, per requirements from the Acting Principal Director of Defense Pricing and Contracting dated 13 August 2020, the provision at FAR 52.204-24,

“Representation Regarding Certain Telecommunications and Video Surveillance Services or Equipment” is incorporated in this solicitation. If selected for award, the **Task 1** Offeror must complete and provide the representation, as required by the provision, to the CM.

5 Selection

5.1 Preliminary Screening

The CM will conduct a preliminary screening of submitted proposals to ensure compliance with the RPP requirements. As part of the preliminary screening process, Proposals that do not meet the requirements of the RPP may be eliminated from the competition or additional information may be requested by the CM. Additionally, the Government reserves the right to request additional information or eliminate proposals that do not meet these requirements from further consideration.

5.2 Stage 1 Proposal Evaluation

The CM will distribute all Proposals that pass the preliminary screening (described above) to the Government for full evaluation. Evaluation of Proposals will be based on an independent, comprehensive review and assessment of the work proposed against the stated source selection criteria and evaluation factors. The Government will evaluate each Proposal against the evaluation factors detailed below and assign adjectival ratings to the non-cost/price factor(s) consistent with those defined in Table 1 (General Merit Rating Assessments). The Offeror shall clearly state how it intends to meet and, if possible, exceed the RPP requirements. Mere acknowledgement or restatement of a RPP requirement is not acceptable. The overall award decision will be based upon a best value determination by considering factors in addition to cost/price.

The evaluation factors and evaluation criteria are unique to each RPP Task (i.e., Task 1 and Task 2), are described below and are of equal importance.

TASK 1 Evaluation Factors: Offerors proposing against Task 1 will be evaluated against the following equally important factors:

- 1. Technical Approach**
- 2. Project Management and Experience**

Factor #1 – Technical Approach: This factor will evaluate the relevancy, thoroughness, completeness, and impact of the proposed approach (e.g., the technical merit) and how well the proposal defines and meets the requirements of the Integrator’s role and function. The USG will assess the degree of demonstrated aptitude to manage up to three dozen Task 2 Performers simultaneously. This factor may also evaluate whether the proposed budget (i.e., ROM) is reasonable and complete.

Factor #2 – Project Management and Experience: This factor will evaluate the project team’s ability to execute the SOW demonstrated by their expertise, key personnel, and experience. The schedule will be evaluated to determine whether the proposed work is realistic and reasonable within the proposed period of performance. This factor also includes evaluation of the Offeror’s Project Management Plan.

TASK 2 Evaluation Factors: Offerors proposing against Task 2 will be evaluated against the following equally important factors:

1. **Approach**
2. **Experience and Expertise**

Factor #1 – Approach: This factor will evaluate the degree to which the proposal meets the requirements of the Task 2 Performer’s role and function, especially the plan and ability to integrate, test, and evaluate the benchmark. This factor will also evaluate whether the proposed budget is reasonable and supports activities related to evaluation of the benchmark (e.g., dog-related expenses, SM travel and lodging, classroom technology, aftercare costs). In addition to the above stated requirements, the Government will consider factors that protect the safety of the service dogs, SM, and the public. The Government will also evaluate the aptitude of Offerors to engage in a robust academic debate related to the benchmark guidelines.

Factor #2 – Experience and Expertise: This factor will evaluate the Offeror’s experience and expertise in training and matching service dogs and SM. Key factors include history of placing service dogs with SM, SM waitlist, knowledge of existing guidelines and regulations, facility units, curricula, and personnel. This factor will include assessment of the support staff and tools available to execute the roles and function of the Task 2 Performer effectively and safely.

Table 1 explains the adjectival merit ratings that will be used for the evaluation factors.

TABLE 1 - GENERAL MERIT RATING ASSESSMENTS	
RATING	DESCRIPTION
OUTSTANDING	Proposal meets requirements and indicates an exceptional approach and understanding of the requirements. Strengths far outweigh any weaknesses. Risk of unsuccessful performance is very low.
GOOD	Proposal meets requirements and indicates a thorough approach and understanding of the requirements. Proposal contains strengths which outweigh any weaknesses. Risk of unsuccessful performance is low.
ACCEPTABLE	Proposal meets requirements and indicates an adequate approach and understanding of the requirements. Strengths and weaknesses are offsetting or will have little or no impact on contract performance. Risk of unsuccessful performance is no worse than moderate.

MARGINAL	Proposal does not clearly meet requirements and has not demonstrated an adequate approach and understanding of the requirements. The proposal has one or more weaknesses which are not offset by strengths. Risk of unsuccessful performance is high.
UNACCEPTABLE	Proposal does not meet requirements and contains one or more deficiencies. Proposal is not awardable.

Please also refer to Section 5.3 for definitions of general terms used in technical evaluations.

Upon review and evaluation of the Proposals, the Government sponsor will perform proposal source selection. This will be conducted using the evaluation factors detailed above. The Government will conduct an evaluation of all qualified proposals after the preliminary screening (described in Section 5.1). The Source Selection Authority may:

- 1. Select the proposal (or some portion of the proposal) for award***
- 2. Place the proposal in the Basket if funding currently is unavailable; or***
- 3. Reject the proposal (will not be placed in the Basket)***

As a note: the term “Basket” refers to a list of proposals approved by the original sponsor for an effort and from which the original sponsor or other sponsors may choose to fund projects from. A proposal may stay in the Basket for up to two years (from the date of proposal submission).

In rare cases, the following recommendation may be provided: “Recommendation Undetermined.” This is reserved for situations in which additional information/documentation is needed by the Government evaluators before finalizing a recommendation to one of those listed above and is intended to facilitate the release of all evaluator comments within the BIDS System.

The RPP review and award process may involve the use of contractor subject matter experts (SMEs) serving as nongovernmental advisors. All members of the technical evaluation panel, to include contractor SMEs, will agree to and sign a Federal Employee Participation Agreement or a Nondisclosure/Nonuse Agreement, as appropriate, prior to accessing any proposal submission to protect information contained in the RPP as outlined in Section 2.5.

5.3 Definition of General Terms Used in Evaluations

Significant Strength – An aspect of an Offeror's proposal that has appreciable merit or appreciably exceeds specified performance or capability requirements in a way that will be appreciably advantageous to the Government during award performance.

Strength – An aspect of an Offeror’s proposal that has merit or exceeds specified performance or capability requirements in a way that will be advantageous to the Government during award performance.

Weakness – A flaw in the proposal that increases the risk of unsuccessful award performance.

Significant Weakness – A flaw that appreciably increases the risk of unsuccessful award performance.

Deficiency – A material failure of a proposal to meet a Government requirement or a combination of weaknesses in a proposal that increases the risk of unsuccessful award performance to an unacceptable level.

6 Points-of-Contact

For inquiries, please direct your correspondence to the following contacts:

- Questions concerning contractual, cost or pricing related to this RPP should be directed to the MTEC Contracts Administrator, mtec-contracts@ati.org
- Technical and membership questions should be directed to the MTEC Biomedical Research Associate, Dr. Chuck Hutti, Ph.D., chuck.hutti@ati.org
- All other questions should be directed to the MTEC Chief of Consortium Operations, Ms. Kathy Zolman, kathy.zolman@ati.org

7 Acronyms/Abbreviations

ACURO	Animal Care and Use Review Office
ADI	Assistance Dogs International
AKC	American Kennel Club
ASDPMV	Association of Service Dog Provides for Military Veterans
ATI	Advanced Technology International
ATTS	American Temperament Test Society
CAS	Cost Accounting Standards
CBC	Complete Blood Count
CCPDT	Certification Council for Professional Dog Trainers
CGC	Good Canine Citizen
CM	Consortium Manager
CMA	Consortium Member Agreement
CMS	Centers for Medicare & Medicaid Services
DCAA	Defense Contract Audit Agency
DCMA	Defense Contract Management Agency
DD 214	Certificate of Release or Discharge from Active Duty
DHLPP	Distemper, Hepatitis, Leptospirosis, Parvo and Para-virus
DoD	Department of Defense
DODI	Department of Defense Instruction
F&A	Facilities and Administrative Costs
FAQ	Frequently Asked Questions
FMC	Fragmented Medial Coronoid

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FOIA	Freedom of Information Act
FY	Fiscal Year
G&A	General and Administrative Expenses
Government	U.S. Government, specifically the DoD
IAADP	International Association of Assistance Dog Partners
IACP	International Association of Canine Professionals
IACUC	Institutional Animal Care and Use Committee
IGDF	International Guide Dog Federation
IHDI	International Hearing Dog, Inc
III	Individual Identifying Information
IP	Intellectual Property (e.g., patents, copyrights, licensing, etc.)
IRB	Institutional Review Board
IR&D	Independent Research and Development
M	Millions
MPS	Milestone Payment Schedule
MTEC	Medical Technology Enterprise Consortium
NADOI	National Association of Dog Obedience Instructors
NDA	Nondisclosure Agreement
NDAA	National Defense Authorization Act
OCI	Organizational Conflict of Interest
ODC	Other Direct Costs
OHARO	Office of Human and Animal Research Oversight
OHRO	Office of Human Research Oversight
ORP	Office of Research Protections
OTA	Other Transaction Agreement
PAT	Public Access Test
PDF	Portable Document Format
PHI	Protected Health Information
PMR	Procurement Management Review
POC	Point-of-Contact
PoP	Period of Performance
PPG	Proposal Preparation Guide
ROM	Rough Order of Magnitude
RPA	Research Project Award
RPI	Request for Project Information
RPP	Request for Project Proposals
SAM	System for Award Management
SM	Service Member/Veteran
SME	Subject Matter Expert
SOTR	Sponsor Office Technical Representative
SOW	Statement of Work
UAP	Ununited Anconeal Process
UEI	Unique Entity Identifier

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USAMRDC U.S. Army Medical Research and Development Command
USG U.S. Government
USU Uniformed Services University of the Health Sciences
WWSDP Wounded Warrior Service Dog Program

8 TASK 1 ONLY - Enhanced White Paper Template

Cover Page

[Name of Offeror]

[Address of Offeror]

[Phone Number and Email Address of Offeror]

Unique Entity ID: [UEI]

CAGE code: [CAGE code]

[Title of Enhanced White Paper]

[Offeror] certifies that, if selected for award, the Offeror will abide by the terms and conditions of the MTEC Base Agreement.

[Offeror] certifies that this Enhanced White Paper is valid for 3 years from the close of the applicable RPP, unless otherwise stated.

[A proprietary data disclosure statement if proprietary data is included. Sample:

This Enhanced White Paper includes data that shall not be disclosed outside the MTEC Consortium Management Firm and the Government. If, however, an agreement is awarded as a result of, or in connection with, the submission of this data, the MTEC Consortium Management Firm and the Government shall have the right to duplicate, use, or disclose these data to the extent provided in the resulting agreement. This restriction does not limit the MTEC Consortium Management Firm and the Government's right to use the information contained in these data if they are obtained from another source without restriction. The data subject to this restriction is (clearly identify) and contained on pages (insert page numbers).]

[Title of Enhanced White Paper]

Programmatic Relevance

- Briefly describe previous relevant experience providing technical, programmatic, financial, and/or scientific solutions to the Government, and specific experience related to the following areas:
 - Functional knowledge of quantitative and qualitative data analysis.
 - Experience with psychometric assessments.
 - Functional knowledge of federal travel regulations and systems.

Scope Statement

- Define, in your own words, the scope of the effort and clearly state the objectives of the project.

Technical Approach

- Detail a clear course of action for verifying that Task 2 Performers integrate/use, test, and evaluate each prototype guidelines
- Describe the projected Task 2 deliverables that will be achieved during the period of performance.
- Propose methods for collecting data that will be used to evaluate prototype guidelines.
- Propose methods for translating data into actionable information to be used for the optimizing the prototype guidelines.

Team, Resources, and Management Plan

- List anticipated areas of management support related to Task 2 of this effort
- Describe the overall project management plan related to this effort that clearly defines roles and responsibilities for the Task 1 Integrator. This plan should include a communication and conflict resolution plan.
- Identify any key facilities, equipment and other resources proposed for the effort. Identified facilities, equipment and resources should be available and relevant for the technical solution being proposed.

Schedule

- Provide a schedule (e.g., Gantt chart) for the 12-month PoP that clearly shows the milestones for the Task 1 deliverables. Provide each major task and subtasks as separate lines. Do not duplicate the level of detail presented in the Statement of Work (**Addendum 6**).

Risk Identification and Mitigation

- Identify key technical, schedule, and cost risks. Discuss the potential impact of the risks, as well as potential mitigations.

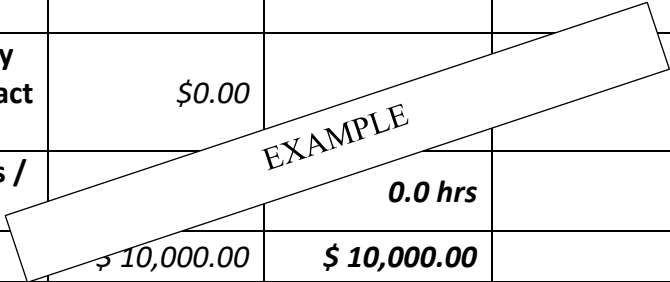
Cost Sharing

- The Enhanced White Paper shall describe any current and past partnerships that maximize funding dollars from non-government entities (via agreement structure, cost sharing with industry or other partners) for efforts similar to the WWSDP requirement and how these reduce risk for stakeholders.
- Detail past projects with cost sharing (from non-government entities) and the types and amounts of additional funding that supported previous projects.
- Describe cost share included to support the proposed scope of work.

Rough Order Magnitude (ROM) Pricing

- The Offeror must provide an estimate based on the technical approach proposed in the Enhanced White Paper. The following ROM pricing example format shall be included in the Enhanced White Paper (the number of columns should reflect the proposed PoP, i.e., add or delete the yearly budget columns as needed). **Use the example table format and template below to provide the ROM pricing.** The labor, travel, material costs, other direct costs, and indirect costs, information should be entered for Offeror (project prime) only. Subcontractors and/or consultants should be included only in the “Task 1 Subcontractors” or “Consultants” sections of the table, as appropriate, and should include only those Subcontractors and/or consultants required to perform Task 1 requirements. If selected for award, a full cost proposal will be requested.

	<i>Year 1</i>	<i>TOTAL</i>	<i>% of total fund ***</i>
Labor	<i>\$ 100,000.00</i>	<i>\$ 100,000.00</i>	<i>0.7%</i>
Labor Hours	<i>1,000.0 hrs</i>	<i>1,000.0 hrs</i>	<i>-</i>
Task 1 Subcontractors (exclusive of Task 2 Offerors)	<i>\$ 50,000.00</i>	<i>\$ 50,000.00</i>	<i>0.35%</i>
Task 1 Subcontractors Hours (exclusive of Task 2 Offerors)	<i>500.0 hrs</i>	<i>500.0 hrs</i>	<i>-</i>
Government/Military Partner(s)/Subcontractor(s) (subKTR)*	<i>\$0.00</i>		<i>0%</i>
Gov't/Military Prtnrs / subKTR Hours*		<i>0.0 hrs</i>	<i>-</i>
Consultants	<i>\$ 10,000.00</i>	<i>\$ 10,000.00</i>	<i>0.07%</i>
Consultants Hours	<i>100.0 hrs</i>	<i>100.0 hrs</i>	<i>-</i>
Material/Equipment	<i>\$ 75,000.00</i>	<i>\$ 75,000.00</i>	<i>0.53%</i>



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Other Direct Costs	<i>\$ 1,000.00</i>	<i>\$ 1,000.00</i>	<i>0.007%</i>
Travel	<i>\$ 5,000.00</i>	<i>\$ 5,000.00</i>	<i>0.035%</i>
Task 2 Subcontractors** (Based on projected 20 Task 2 Performers)	-	-	-
Indirect costs	<i>\$ 48,200.00</i>	<i>\$ 48,200.00</i>	<i>0.34%</i>
Total Cost	<i>\$ 289,200.00</i>	<i>\$ 289,200.00</i>	<i>2.05%</i>
Fee (Not applicable if cost share is proposed)	<i>\$ 0.00</i>	<i>\$ 0.00</i>	<i>0%</i>
Total Cost (plus Fee)	<i>\$ 289,200.00</i>	<i>\$ 289,200.00</i>	<i>2.05%</i>
Cost Share (If cost share is proposed then fee is unallowable)	<i>\$ 290,000.00</i>	<i>\$ 290,000.00</i>	<i>2.05%</i>
Total Project Cost	<i>\$ 530,200.00</i>	<i>\$ 530,200.00</i>	<i>3.76%</i>

*Use the rows above for “Government/Military Partner(s)/Subcontractor(s)” if the project involves one or more Government/Military Facilities (Military Health System facility, research laboratory, treatment facility, dental treatment facility, or a DoD activity embedded with a civilian medical center) performing as a collaborator in performance of the project.

**Use the row above for “Task 2 Subcontractors” as a placeholder for the portion of the total budget that will be allocated to the Task 2 Offerors selected by the USG to be teamed as subcontractors to the Task 1 Integrator. Refer to Section 2.2. of the RPP for details regarding the total funding available for this program.

*** Offerors should indicate the total cost of each item in terms of a percentage of the total available award funds (\$14.1 M)

Estimate Rationale

- Provide a **brief** rationale describing how the estimate was calculated and is appropriate for the proposed scope or approach.

APPENDICES (excluded from the page limit, and must be uploaded to BIDS as separate documents)

Appendix 1: Data Rights Assertions (template provided in Addendum 3 of this RPP)

- The Offeror shall comply with the terms and conditions defined in the Base Agreement regarding Data Rights. It is anticipated that anything delivered under this proposed effort would be delivered to the Government in accordance with Section 2.10 of the RPP unless otherwise asserted in the proposal and agreed to by the Government.
- If this is not the intent, then you should discuss any restricted data rights associated with any proposed deliverables/milestones. If applicable, complete the table within the referenced attachment for any items to be furnished to the Government with restrictions.

Appendix 2: Statement of Work (template provided in Addendum 6 of this RPP)

- Provide a draft Statement of Work as a separate Word document to outline the proposed technical solution and demonstrate how the contractor proposes to meet the Government objectives. Submitted information is subject to change through negotiation if the Government selects the Enhanced White Paper for award. The format of the proposed Statement of Work shall be completed in accordance with the template provided in **Addendum 6 of this RPP**.
- The Government reserves the right to negotiate and revise any or all parts of SOW/Milestone Payment Schedule (MPS). Offerors will have the opportunity to concur with revised SOW/Milestone Payment Schedule as necessary.

Appendix 3: Warranties and Representations: (template provided in Addendum 7 of this RPP)

- Warranties and Representations are required. One Word (.docx or .doc) or PDF file that contains all Warranties and Representations is required.

Addendum 1 – Cost Share Definitions

Cost Sharing includes any costs a reasonable person would incur to carry out (necessary to) proposed projects' statements of work (SOW) not directly paid for by the Government. There are two types of cost sharing: Cash Contribution and In-Kind Contribution. If a proposal includes cost share, then it cannot include fee. Cost Share may be proposed only on cost type agreements. Prior Independent Research and Development (IR&D) funds will not be considered as part of the Consortium Member's cash or In-Kind contributions, except when using the same procedures as those that authorize Pre-Award Costs, nor will fees be considered on a Consortium Member's cost sharing portion.

Cash Contribution

Cash Contribution means the Consortium and/or the Research Project Awardee (or Awardees' lower tier subawards) financial resources expended to perform a Research Project. The cash contribution may be derived from the Consortium's or Research Project Awardee (or Awardees' subawards) funds or outside sources or from nonfederal contract or grant revenues or from profit or fee on a federal procurement contract.

An Offeror's own source of funds may include corporate retained earnings, current or prospective IR&D funds or any other indirect cost pool allocation. New or concurrent IR&D funds may be utilized as a cash contribution provided those funds identified by the Offeror will be spent on performance of the Statement of Work (SOW) of a Research Project or specific tasks identified within the SOW of a Research Project. Prior IR&D funds will not be considered as part of the Offeror's cash.

Cash contributions include the funds the Offeror will spend for labor (including benefits and direct overhead), materials, new equipment (prorated if appropriate), awardees' subaward efforts expended on the SOW of a Research Project, and restocking the parts and material consumed.

In-Kind Contribution

In-Kind Contribution means the Offeror's non-financial resources expended by the Consortium Members to perform a Research Project such as wear-and-tear on in-place capital assets like machinery or the prorated value of space used for performance of the Research Project, and the reasonable fair market value (appropriately prorated) of equipment, materials, IP, and other property used in the performance of the SOW of the Research Project.

Addendum 2 – Statutory Requirements for the Use of Other Transaction Authority

A nontraditional defense contractor is a business unit that has not, for a period of **at least one year prior to the issue date of the Request for Project Proposals**, entered into or performed on any contract or subcontract for DoD that is subject to full coverage under the cost accounting standards (CAS) prescribed pursuant to section 26 of the Office of Federal Procurement Policy Act (41 U.S.C. 1502) and the regulations implementing such section. The nontraditional defense contractor can be an individual so long as he/she has a DUNS Number and meets the requirements in the Warranties and Representations.

Significant Extent Requirements

All Offerors shall submit Warranties and Representations (See **Addendum 7**) specifying the critical technologies being offered and/or the **significant extent** of participation of the nontraditional defense contractor and/or nonprofit research institution. The significance of the nontraditional defense contractor's and/or nonprofit research institution's participation shall be explained in detail in the signed Warranties and Representations. Inadequate detail can cause delay in award.

Per the DoD OT Guide, rationale to justify a *significant extent* includes:

1. Supplying a new key technology, product or process
2. Supplying a novel application or approach to an existing technology, product or process
3. Providing a material increase in the performance, efficiency, quality or versatility of a key technology, product or process
4. Accomplishing a significant amount of the prototype project
5. Causing a material reduction in the cost or schedule of the prototype project
6. Providing a material increase in performance of the prototype project

Conditions for use of Prototype OT Authority

Proposals that do not include one of the following will not be eligible for award:

- (A) At least one nontraditional defense contractor or nonprofit research institution participating to a significant extent in the prototype project; or
- (B) All significant participants in the transaction other than the Federal Government are small businesses (including small businesses participating in a program described under section 9 of the Small Business Act (15 U.S.C. 638)) or nontraditional defense contractors; or
- (C) At least one third of the total cost of the prototype project is to be paid out of funds provided by sources other than the Federal Government.

This requirement is a statutory element of the Other Transaction Authority and will be regarded as a pass/fail criterion during the Compliance Screening in order to ensure compliance with 10 U.S.C. §4022.

Addendum 3 – Intellectual Property and Data Rights Assertions

Definitions

- **Intellectual Property (IP) Rights** for MTEC Research Project Awards will be defined in the terms of an awardee’s Base Agreement and will flow down to all subawards, unless specifically negotiated in any resultant Research Project Award. MTEC Base Agreements are issued by the MTEC CM to MTEC members receiving a Research Project Award as the prime performer. Base Agreements include the applicable flow down terms and conditions from the Government’s Other Transaction Agreement with MTEC, including the IP terms and conditions.
- **Data Rights**: The Offeror shall comply with the (flow down) terms and conditions contained in the Base Agreement regarding Data Rights, as modified by the specifically-negotiated Data rights terms herein. Refer to Section 2 of this RPP.

Directions to the Offeror:

- If applicable, complete the below table for any items to be furnished to the Government with restrictions. An example is provided. If the Offeror does not assert data rights on any items, a negative response is required by checking the applicable box below.
- *Failure to complete this attachment in its entirety (including a failure to provide the required signature) may result in removal from the competition and the proposal determined to be ineligible for award.*
- If the Offeror intends to provide technical data or computer software which existed prior to or was produced outside of the proposed effort, to which the Offeror wishes to maintain additional rights, these rights should be asserted through the completion of the table below.
- ***Note that this assertion is subject to negotiation prior to award.***

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- If Offeror WILL be asserting data rights for the proposed effort, check this box and complete the table below, adding rows as necessary.
- This award or sub-award contains federally-funded SBIR/STTR Data.

Technical Data or Computer Software to be Furnished with Restrictions	Basis for Assertion	Asserted Rights Category	Name of Organization Asserting Restrictions	Milestone # Affected
Software XYZ	Previously developed software funded exclusively at private expense	Restricted	Organization XYZ	Milestones 1, 3, and 6
Technical Data Description	Previously developed exclusively at private expense	Limited	Organization XYZ	Milestone 2
Technical Data Description	Previously developed with mixed funding	Government Purpose Rights	Organization XYZ	Milestone 2

- If the Offeror will NOT be asserting data rights for the proposed effort, check this box.

Signature of Responsible Party for the Proposing Offeror

DATE

Addendum 4 – Prototype Guidelines

The following is a draft benchmark for the training and placement of service dogs with SMs. This draft benchmark is intended to serve as a starting point for the team of Task 1 and Task 2 successful Offerors to evaluate and improve upon.

1. GENERAL REQUIREMENT

All **Task 2** awardees of the Wounded Warrior Service Dog Program (MTEC-23-07-WWSDP) must be able to implement, test, and evaluate the guidelines set forth in this document. This requirement applies to both Service Members or Veterans (henceforth known as “SM”) and service dogs regardless of disability, breed, age, size, or sex. Compliance and evaluation of these guidelines must be documented in selection, health, and training records. Canine records must include signalment (name, breed or cross, age, sex, microchip #, and coat color). Note. This prototype considers service dog intervention as complementary treatment. The term treatment appears in quotes in order to emphasize that service dog intervention is meant to supplement, not replace, other therapeutic interventions.

2. ASSESSMENT AND SELECTION

2.1. To be eligible for consideration, all SM must submit the following records prior to selection (failure to provide records or to meet eligibility criteria is disqualifying):

2.1.1. Disability diagnosis (see RPP, section 3.1) issued by a licensed healthcare provider or the Veterans Affairs (VA);

2.1.2. Letter from a healthcare provider attesting that the SM is not currently undergoing inpatient treatment, or is 6-month or more post successful substance abuse, mental health, or suicide ideation treatment;

2.1.3. Letter from a healthcare provider attesting that the SM is capable of caring for a dog and participating in handler training, including required travel, if appropriate;

2.1.4. Written statement attesting that the SM is financially capable of caring for a dog, including but not limited to the provision of annual veterinary care (at minimum), AAFCO-approved dog food, required tags and licensure, breed-specific grooming, and any required medications or medical treatments. For a detailed list see: <https://www.akc.org/expert-advice/lifestyle/know-true-cost-owning-dog/>;

2.1.5. Proof of stable housing for over six consecutive months (e.g., utility bills, house lease). Group housing is not acceptable as proof of stable housing;

2.1.6. Agreement statement from other adult(s) house members to have a dog, if appropriate;

2.1.7 Written testament that SM was not convicted, or found not guilty by reason of insanity, in a civilian or military jurisdiction of any violent or substance abuse-related criminal offenses, and that the SM was never convicted of any felony that resulted in incarceration longer than sixty days. The SM must also consent to undergo a national criminal background check. Rare mitigating circumstances, such as participation in the Health Care for Re-Entry Veterans program, may be considered; and

2.1.8. Certificate of Release or Discharge from Active Duty (DD 214). SM released or discharged for any of the reasons outlined in 38 U.S.C. § 5303 and 38 CFR § 3.12(d) are ineligible.

2.2. To be eligible for consideration, all canines must have the following radiographic testing prior to selection (X-rays/radiographs must not be older than 60 days):

2.2.1. Radiograph hip grade of good or better at 14 or more months (based on Orthopedic Foundation for Animals scoring system (<http://ofa.org/diseases/hip-dysplasia/>), or Penn Hip index value of <0.30 at 16 weeks or older (<https://info.antechimagingervices.com/pennhip/>)). Radiographs of the elbows, hips, and spine require anesthesia for proper positioning and imaging;

2.2.2. Radiograph of the elbows of each forelimb, and a statement from a veterinarian radiologist attesting to the absence of:

2.2.2.1. Elbow dysplasia. Includes fragmented medial coronoid (FCP) of the ulna, osteochondritis of the medial humeral condyle, elbow incongruency and ununited anconeal process (UAP);

2.2.2.2. Unhealed fractures or healed fractures with significant bone or joint conformation changes or lameness;

2.2.2.3. Ligament damage, osteoarthritis, etc. of the joints;

2.2.2.4. Transitional vertebrae of the caudal lumbar spine, lumbosacral junction or sacrum; and

2.2.2.5. Asymmetric pelvic attachment.

2.3. To be eligible for consideration, all canines must have a complete medical evaluation prior to selection, including a statement from a licensed veterinarian attesting to the absence of:

2.3.1. Any gait abnormality at walk or run which could adversely impact normal duties;

2.3.2. Chronic skin, ear, and coat abnormalities such as dermatitis, allergies, infections, injuries or external parasite infections;

2.3.3. Overshot or undershot jaws. All four canine teeth must be present and must not be weakened by notching, enamel hypoplasia or abnormal, excessive wear. No more than 1/3 inch of the tip missing or have pulp cavity exposed. No evidence of oral infection or periodontal disease. No broken teeth or excessively worn teeth;

2.3.4. Abnormal cardiovascular and respiratory indications (e.g., murmurs, arrhythmia) at rest and exercise;

2.3.5. Defect in the nervous system, vision, hearing, and olfactory senses;

2.3.6. Abnormal bones, joints, or muscles condition which could adversely impact normal duties;

2.3.7. Current heartworm disease (*dirofilaria immitis*) in heartworm antigen test. A negative heartworm concentration test (filtration or Knott's) is not sufficient;

2.3.8. Infection with intestinal parasites (roundworms, hookworms, tapeworms, giardia, etc.) based on stool samples;

2.3.9. External parasites such as fleas, ticks, lice, or mange mites;

2.3.10. Congenital or conformational abnormality in reproductive and urinary system;

2.3.11. Immunotherapy or allergy conditions; and

2.3.12. Any other condition that may impact the dog's working life prior to selection (e.g., dietary restrictions, metabolic diseases, etc.).

2.4. Additional common breed-specific genetic disorders must be screened for prior to selection (see: <http://ofa.org/diseases/>).

2.5. To be eligible for consideration, all canines must have the following required documentation prior to selection:

2.5.1. Parasite prevention/control treatments administered and date of administration;

2.5.2. Laboratory tests with negative results on the vector-borne disease panel and fecal exam, as well as normal-range CBC with Chemistry Panel and complete urine analyses;

2.5.3. Vaccination history within the previous 12 months for rabies, DHLPP (Distemper, Hepatitis, Leptospirosis, Parvo and Para-virus), coronavirus, bordetella (nasal dosage), adenovirus-2, and Lyme Disease (if needed). Records must include canine name and microchip number;

2.5.4. Temperament/personality traits testing results with the absence of problematic behaviors. Tests must be industry-recognized (e.g., ATT, ATTS, Avidog, C-BARQ, Dognition, Volhard Puppy Aptitude Test); and

2.5.5. Pedigree, registration certificates, scorebooks, breed surveys, and other proof of lineage or related paperwork as applicable.

2.6. All canines must have a statement from a licensed veterinarian, clinic receipt, or previous license information with proof of spay/neuter surgery (with the exception of breeders) prior to graduation.

2.7. All canines must be selected prior to their third birthday unless the SM has a prior relationship with the dog, in which case appropriate age determination may be made on a case-by-case basis.

2.8. Conduct an in-depth interview with SM, prior to selection, to assess desired outcome(s) and suitability of service dogs. It should include, at minimum, lifestyle habits, physical traits, and personality characteristics.

2.9. Develop a “treatment” contract with SM prior to selection (see Enclosure below). Each contract must—

2.9.1. be SM-specific;

2.9.2. be developed in a collaborative fashion with the SM;

2.9.3. identify at least one outcome objective that mitigates an impairment. The objective must be a verb, representing an action the SM is currently not able to execute;

2.9.4. focus on the SM, not the canine (canine tasks are merely a means to an end). For example, blocking is not an appropriate objective because it does not represent an action by the SM. On the other hand, going out to the mall, three times per week, is an appropriate objective;

2.9.5. be limited to observable and quantifiable objectives. For the purpose of this contract, objectives are restricted to behaviors (e.g., going to the mall, as opposed to feeling comfortable going to the mall). Psychological objectives are not authorized because such objectives may have validity and reliability issues. However, this should not dissuade awardees from using them above-and-beyond the required objectives;

2.9.6. include performance-based objectives. For infrequent objectives (e.g., going out to movie, walking around block, doing laundry), use discrete behaviors (e.g., once per day/week/month), and for frequent objectives (e.g., accessing a dropped item, opening a drawer),

use 90% threshold (e.g., retrieving a dropped item 9 of 10 items on first cue/command per hour/day/week, etc.). The contract must specify objective methods to record behaviors (e.g., mall receipts, bodycam recording of opening drawer, logbook entries by a third-party); and

2.9.7. be modified or revised if the needs/wishes of the SM change, as practicable. Training must continue until performance criteria has been met for each objective.

3. CANINE DOG CARE

3.1. Maintain records of adequate grooming practices:

3.1.1. Bathing (depending on coat type, health, and lifestyle; consult veterinarian for frequency);

3.1.2. Brushing coat and providing dematting and deshedding treatments (consult veterinarian for frequency);

3.1.3. Eye cleaning with every bath and with any noticeable discharge;

3.1.4. Ear cleaning every month;

3.1.5. Nail trimming every month;

3.1.6. Hair trimming (consult veterinarian for frequency);

3.1.7. Teeth brushing at least 3-4 times a week; and

3.1.8. Anal sacs inspection (consult veterinarian if noticing scooting, licking, or scratching of anus).

3.2. Maintain canines on standard anti-parasitic medication, and document when the medication was administered.

3.3. Microchip the canine and enroll microchip in the national registry, if appropriate. If history is unknown, scan canine for microchip.

3.4. Maintain records of adequate water and food provisions.

3.5. Maintain separate medical and husbandry records for each dog. Records must denote the dog's name, microchip #, and date of assessment on each record page or image.

4. FACILITY

- 4.1. Meet minimum kennel physical dimensions requirements per 9 CFR 3.6 and 9 CFR 3.8), if appropriate.
- 4.2 Provide canines with a safe environment including, but not limited to, lack of harmful substances/items, no sharp points or edges, excessive rust, and outdoor shelter.
- 4.3. Keep records of target and actual ventilation, temperature, humidity, and sanitation parameters.

5. TESTS, INSPECTIONS, AND CERTIFICATIONS

- 5.1. Train canines to pass obedience and public access tests.
- 5.2. All SM must pass a public access test prior to graduation, even if the service dog is already proficient.
- 5.3. All SM must pass an obedience test if the SM and dog train together from day 1. Regardless, it is recommended that SM pass an obedience test prior to the public access test, even if the dog is already proficient.
- 5.4. Internal, or “in-house”, tests may not be used. Instead, organizations must use external published tests (e.g., AKC CGC, Pet Partners PPST & PPAT, ADI PAT, AKC CGCU, PSDP PAT).
- 5.5. Test-specific policies and procedures must be adhered to.
- 5.6. Tests must be administered, graded, and certified by test-specific evaluators (e.g., AKC evaluator, ADI trainer).
- 5.7. If specific evaluators are not required (e.g., PSDP PAT), organizations must use external NADOI or CCPDT evaluators.
- 5.8. SM must be provided with official training logs, test results, ID, and certificates (when possible).
- 5.9. Although not required, it is recommended to provide SM with a video recording of tests (e.g., obedience and public access).
- 5.10. Conduct a routine veterinarian health screening at least annually until graduation. The screening must include, at minimum, heartworm, parasite, and physical exams. All canines must remain free of medical conditions that could impact their working life prior to graduation.

5.11. Conduct, at least, one home inspection prior to accepting SM into the program. The purpose of this visit is to:

5.11.1. Assess suitability of indoors and outdoors environment;

5.11.2. “Canine-proof” the household for safety (see section 4). Any remedial action must be recorded and addressed by the SM prior to matching;

5.11.3. Identify and evaluate household members (e.g., adults, children under 10). If a child in the home is less than 10 years of age, SM and substitute caregiver (see section 6.1) must be taught dog bite prevention (see AVMA) before matching;

5.11.4. Identify and evaluate pets in the household; and

5.11.5. Identify and evaluate physical environment related to impairment (staircase gradient, drawer dimensions, switches [toggle, rocker, slider, push-button], distance and transportation options to mall).

5.12. Conduct, at least, one home inspection between 6 and 12 months after graduation to assess changes in living conditions. Note. Awardees are required to evaluate, but not comply with, this standard.

5.13. At least two home inspections, 6 and 12 months after graduation, if a child in the home is less than 10 years of age. Inspector must look for indicators of canine stress when child is present and instruct family how to monitor canine behavior. Note. Awardees are required to evaluate, but not comply with, this standard.

5.14. Requiring SM to complete annual refreshers to maintain and improve knowledge, skills, and abilities. Refreshers must include a pass/fail performance criteria. Note. Awardees are required to evaluate, but not comply with, this standard.

5.15. Requiring any staff recognized as trainers to hold any industry-recognized training certificate (e.g., ABC, CCPDT, NADOI, IACP). Note. Awardees are required to evaluate, but not comply with, this standard.

5.16. Requiring trainers to complete continuing education credits or annual refreshers with a pass/fail criteria.

5.17. Requiring SM to participate in annual public access test recertifications. Note. Awardees are required to evaluate, but not comply with, this standard.

5.18. Develop, or use existing, empirical tests to verify that SM and canine accomplish learning modules and associated tasks. These tests must be identified prior to training. For example, what is the empirical proof that the canine can reliably turn a light switch on/off or that the SM mastered the legal aspects of service dogs? For the SM, these tests must be included in the “treatment” contract. For the canine tasks, these tests must be recorded in the canine training logs.

6. TRAINING

6.1. Identify a substitute caregiver prior to matching. This caregiver must be trained in basic dog care, must be able to routinely monitor the SM and service dog, and assist the SM during the training and aftercare.

6.2. Develop continuing education and refresher training for SM and trainers.

6.3. Keep records of canine socialization to adults and children, other animals, sounds, and a variety of environments. At minimum, record type of socialization, duration, and session outcome.

6.4. Train canine to pass an obedience certification test. If SM and dog train together from day 1, both dog and SM must pass the test.

6.5. Train canine and SM to pass a public access test.

6.6. Train canine and SM to pass elective certifications, as needed (e.g., canine CPR).

6.7. Require SM to successfully complete a classroom phase (see Enclosure below). This “probation” phase permits a more accurate evaluation of training commitment and aptitude. This phase must be offered prior to interacting with canines, unless SM use their own dog.

6.8. Train SM on “treatment” contract outcome objectives until performance criteria is met (see section 2.9).

6.9. Train canine on tasks that enable SM “treatment” contract outcome objectives until performance criteria is met:

6.9.1. Identify canine tasks that enable SM objectives (e.g., blocking to enable going out to mall);

6.9.2. Set observable and quantifiable performance criteria for each canine task. For example, if the objective is waking up to work at 0700, five days a week, the dog must wake up the SM by licking the face in response to an alarm clock 90% of the time over a one-month period. The training logs must specify objective methods to record behaviors (e.g., observer, video recording);

6.9.3. Training logs must connect dog tasks with SM objectives. List enabler task(s) for each objective. Example of enabler tasks for going out to the mall may include: assist with position changes, provide momentum up hill, blocking, carry grocery bag, retrieve dropped items, retrieve item from shelf, find car, and unload grocery items;

6.9.4. Training logs must record the performance criteria for each task;

6.9.5. Training logs must record the date in which each performance criteria was met; and

6.9.6. Note. SM and dog performance criteria are independent from one another. For example, the dog may reliably respond to a blocking command 90% of the time, but the SM is not able to visit the mall three times per week;

6.10. Train canine to perform tasks in a nonintrusive, or damaging, manner to people, other animals, and the physical environment. For example, the dog should not scratch a wall surface in an attempt to turn a light switch on or off.

6.11. Develop a course syllabus for the SM (see Enclosure below for example). At minimum, the syllabus must include:

6.11.1. Required reading material;

6.11.2. Course content;

6.11.3. Outcome objectives and performance criteria. This section must specify the SM impairment(s) to be mitigated, and the conditions that must be met prior to graduation;

6.11.4. Average minimum amount of independent, out-of-class, learning expected per week. This section must specify the in-class and out-of-class time requirement and a table summary of the training phases, duration, and pass/fail requirement for each phase;

6.11.5. Learning modules. This section must list all the planned learning modules. Note. This section must include at least one outcome objective specific to the SM (see 2.9).

6.11.6. Grading. This section must describe all the tests the SM is required to pass;

6.11.7. Important contacts; and

6.11.8. Aftercare and follow-up. This section must describe what is required of the SM after graduation.

6.12. Maintain detailed training logs for both canine and SM. At minimum, record “treatment” contract outcome objective(s) or enabler task(s), performance criteria, duration, and outcome of training.

See Enclosure Next Page

Enclosure – Course Contract Example

[LOGO]

[NAME OF ORGANIZATION] 2023 Veteran Service Dog Training Contract

Point of Contact

[Name, Title]

[Telephone]

[Email]

Required Text

List required text

Course Content

List training modules. For example: Assistance dogs laws, canine health, canine grooming, canine body language, bite prevention awareness training, handler voice and body language, canine Cardiopulmonary resuscitation (CPR), canine good manners and obedience, accessing public spaces, disability related performance.

Outcome Objectives and Performance Criteria

Specify the impairment(s) that you and the SM decided to mitigate prior to training. There is no limit on the number of outcome objectives, so long as the performance criteria is met for each objective prior to graduation (see sections 2 and 6). Example: At the end of this three-week class, _____ (Last, First Name) will be able to independently visit the local mall, at least three times per week. The performance criteria (skills test) for this objective is independently visiting a mall, similar to the one [Name] plans to visit, three times per week over a one month period. For each independent visit, a dated purchase receipt must be produced. Note: If your training program lasts three weeks, you will need to conduct the skills test after the SM returns home. The SM may not graduate until the performance criteria is met.

Average minimum amount of independent, out-of-class, learning expected per week

Specify the in-class and out-of-class time requirement. Include a table summary of training phases, duration, and pass/fail requirement for each phase.

Example: This three-week class meets Monday through Friday, for 8 hours per day. A minimum of 120 hours should be spent in the classroom and 32 hours outside the classroom (independent learning).

Phase	Duration	Instruction	Performance Criteria
Classroom	2 Days (16 hours)	Knowledge modules	6 multiple-choice tests (70%)
Basic	0 Days (0 hours)	Socialization/Obedience	AKC CGC test
Intermediate	6 Days (48 hours)	Public access	CPR test, ADI PAT test
Advanced	7 Days (56 hours)	Outcome objective(s)	Skills Test (to criteria)

Learning Modules

Specify the intended outcome of each learning module. Note that items in this section must mirror items in the course content.

Example: At the end of this three-week training program, _____ (Last, First Name) will be able to:

- List laws pertaining to service dogs
- Describe and demonstrate appropriate canine health and care
- Interpret canine body language
- List canine behaviors and body language that predict dog bites
- Demonstrate effective voice and body language commands and cues
- Perform canine CPR
- Discuss canine good manners and obedience
- Demonstrate proficiency in accessing public spaces principles and commands
- Going out to the mall, three times per week

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Grading

Specify all the tests the SM is required to pass.

Example: Grading is based on passing 6 multiple-choice tests (70% or more), canine CPR test, American Kennel Club (AKC) Good Canine Citizen (CGC) test, Assistance Dogs International (ADI) Public Access Test (PAT), and performance to criteria skills test.

Important Contacts

Specify afterhours, dog care, veterinarian, veterinary clinic, or emergency contracts.

Aftercare and Follow-Up

Specify SM requirements post-graduation.

Example: Veteran is expected to recertify the ADI PAT annually and complete 10 hours of annual continuing education units

Addendum 5 – Privacy Protocols

For Information Only

Award recipients must safeguard the privacy of SM under the purview of this contract.

- a. SM personal identifiable information shall not be released in any written, verbal, or electronic communication.
- b. SM may not be pictured in any electronic or printed media without a written consent.
- c. SM may not be used for promotional purposes without written consent.
- d. SM Protected Health Information (PHI) and Individual Identifying Information (III) shall be protected from unauthorized disclosure.
- e. SM medical records or access to healthcare provider shall not be accessible to the Integrator.
- f. Paper records with SM PHI or III must be placed in a secure location under lock and key.
- g. Electronic records with SM PHI or III must be stored with adequate security safeguards including unique user ID, strong password, automatic logout features, secure server, and updated virus and malware software.
- h. Have a contingency plan for a secure data backup.
- i. Do not email SM PHI or III records.
- j. Do not transfer SM PHI or III records to other computers or portable data storage devices.
- k. SM records must be kept separate from non-SM records.
- l. Mobile devices may not be used to store PHI or III records unless they meets the safeguards in the Centers for Medicare & Medicaid Services (CMS) [HIPAA Basics for Providers: Privacy, Security, & Breach Notification Rules](#) (May, 2021) booklet.
- m. SM PHI or III records may only be handled by personnel who have taken the DoD 2023 [Cyber Awareness Challenge](#) course.

n. SM burden must be reasonable and directly associated with service dog training. The Integrator may not add to this burden by interviewing or questioning SM without written permission.

Addendum 6 – TASK 1 ONLY: Statement of Work and Milestone Payment Schedule

The SOW developed by the Lead MTEC member organization and included in the proposal (also submitted as a separate document) is intended to be incorporated into a binding agreement if the proposal is selected for award. If no SOW is submitted with the proposal, there may be no award. The proposed SOW shall contain a summary description of the technical methodology as well as the task description, but not in so much detail as to make the contract inflexible. DO NOT INCLUDE ANY PROPRIETARY INFORMATION OR COMPANY-SENSITIVE INFORMATION IN THE SOW TEXT. The following is the required format for the SOW.

Statement of Work

Proposal Number: (RPP Number)

Organization:

Title: (Proposed Project Title)

ACURO and/or HRPO approval needed: (If you're conducting any animal or human testing, you will need to submit for the appropriate Army Approvals)

Introduction/Background *(To be provided initially by the Offeror at the time of proposal submission. Submitted information is subject to change through negotiation if the Government selects the proposal for funding.)*

Scope/Project Objective *(To be provided initially by the Offeror at the time of proposal submission. Submitted information is subject to change through negotiation if the Government selects the proposal for funding.)*

This section includes a statement of what the project covers. This should include the technology area to be investigated, the objectives/goals, and major milestones for the effort.

Requirements *(To be provided initially by the Offeror at the time of proposal submission to be finalized by the Government based on negotiation of Scope/Project Objective).*

State the technology objective in the first paragraph and follow with delineated tasks required to meet the overall project goals. The work effort should be segregated into major phases, then tasks and identified in separately numbered paragraphs (similar to the numbered breakdown of these paragraphs). Early phases in which the performance definition is known shall be detailed by subtask with defined work to be performed. Planned incrementally funded phases will require broader, more flexible tasks that are priced up front, and adjusted as required during execution and/or requested by the Government to obtain a technical solution. Tasks will need to track with established adjustable cost or fixed price milestones for payment schedule. Each major task included in the SOW should be priced separately in the cost proposal. Subtasks need not be priced separately in the cost proposal.

Deliverables *(To be provided initially by the Offeror at the time of proposal submission. Submitted information is subject to change through negotiation if the Government selects the proposal for funding.)*

Results of the technical effort are contractually binding and shall be identified herein. Offerors are advised to read the Base Agreement carefully. Any and all hardware/software to be provided to the Government as a result of this project shall be identified. Deliverables should be submitted in PDF or MS Office format.

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It must be clear what information will be included in a deliverable either through a descriptive title or elaborating text.

Site Locations (Provide a list of site locations identifying where all project work is to be conducted. Site locations should be inclusive of the Prime Organization, Sub Contractors, Contract Research Organizations, Military Labs and/or Units. Only add information for an additional site if that site is receiving funding to conduct research as outline in the SOW. Delete "Site 2" header if not used.)

Site 1:	Institution Name	Site 2*:	Institution Name
	Address for primary site		Address for Org #2
	PI: John Doe		Partnering/Site PI/POC: Jane Smith

Milestone Payment Schedule (To be provided initially by the Offeror at the time of proposal submission. Submitted information is subject to change through negotiation if the Government selects the proposal for funding. The milestone schedule included should be in editable format (i.e., not a picture))

The Milestone Payment Schedule should include all milestone deliverables that are intended to be delivered as part of the project, a planned submission date, the monetary value for that deliverable and any cost share, if applicable. For fixed price agreements, when each milestone is submitted, the MTEC member will submit an invoice for the exact amount listed on the milestone payment schedule. For cost reimbursable agreements, the MTEC member is required to assign a monetary value to each milestone. In this case, however, invoice totals are based on cost incurred and will not have to match exactly to the amounts listed on the milestone payment schedule.

The milestones and associated deliverables proposed should, in general:

- be commensurate in number to the size and duration of the project (i.e., a \$5M multi-year project may have 20, while a \$1M shorter term project may have only 6);
- not be structured such that multiple deliverables that might be submitted separately are included under a single milestone;
- be of sufficient monetary value to warrant generation of a deliverable and any associated invoices;
- include, at a minimum, Quarterly Reports which include both Technical Reports and Business Status Reports (due the 25th of Apr, Jul, Oct, Jan), Annual Reports, Final Technical Report, and Final Business Status Report.

MTEC Milestone Payment Schedule Example						
MTEC Milestone Number	Task Number	Significant Event/ Accomplishments	Due Date	Government Funds	Cost Share	Total Funding
1	N/A	Project Kickoff	12/1/2019	\$20,000		\$20,000

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2	N/A	Quarterly Report 1 (October - December, Technical and Business Reports)	1/25/2020	\$ -		\$ -
3	1	Protocol Synopsis	2/28/2020	\$21,075		\$21,075
4	2	Submission for HRPO Approval	2/28/2020	\$21,075		\$21,075
5	3	Submission of Investigational New Drug application to the US FDA	4/30/2020	\$210,757	\$187,457	\$398,214
6	N/A	Quarterly Reports 2 (January - March, Technical and Business Reports)	4/25/2020	\$ -		\$ -
7	N/A	Quarterly Report 3 (April - June, Technical and Business Reports)	7/25/2020	\$ -		\$ -
8	4	Toxicity Studies	10/1/2020	\$63,227		\$63,227
9	N/A	Annual Report 1	10/25/2020	\$ -		\$ -
10	5	FDA authorization trial	11/30/2020	\$84,303		\$84,303
11	6	Research staff trained	11/30/2020	\$ -		\$ -
12	7	Data Management system completed	11/30/2020	\$ -		\$ -
13	8	1 st subject screened, randomized and enrolled in study	1/1/2021	\$150,000	\$187,457	\$337,457
14	N/A	Quarterly Report 4 (October - December, Technical and Business Reports)	1/25/2021	\$ -		\$ -
15	9	Completion of dip molding apparatus	3/1/2021	\$157,829	\$187,457	\$345,286
16	N/A	Quarterly Reports 5 (January - March, Technical and Business Reports)	4/25/2021	\$ -		\$ -
17	10	Assess potential toxicology	6/1/2021	\$157,829		\$157,829
18	N/A	Quarterly Report 6 (April - June, Technical and Business Reports)	7/25/2021	\$ -		\$ -
19	11	Complete 50% patient enrollment	10/1/2021	\$350,000	\$187,457	\$537,457
20	N/A	Annual Report 2	10/25/2021	\$ -		\$ -
21	N/A	Quarterly Report 7 (October - December, Technical and Business Reports)	1/25/2022	\$ -		\$ -
22	12	Electronic Report Forms Developed	3/1/2022	\$315,658	\$187,457	\$503,115
23	N/A	Quarterly Reports 8 (January - March, Technical and Business Reports)	4/25/2022	\$ -		\$ -
24	N/A	Quarterly Report 9 (April - June, Technical and Business Reports)	7/25/2022	\$ -		\$ -

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25	13	Complete 100% patient enrollment	8/1/2022	\$315,658	\$187,457	\$503,115
26	N/A	Annual Report 3	10/25/2022	\$ -		\$ -
27	14	Report results from data analysis	11/1/2022	\$157,829		\$157,829
28	N/A	Final Reports (Prior to the POP End) – Final reports must have a milestone dollar amount.	11/30/2022	\$50,000		\$50,000
			Total	\$2,075,240	\$1,124,742	\$3,199,982

Please Note:

1. Firm Fixed Price Contracts – Milestone must be complete before invoicing for fixed priced contracts.
2. Cost Reimbursable Contracts – You may invoice for costs incurred against a milestone. Invoicing should be monthly.
3. Quarterly and Annual Reports include BOTH Technical Reports and Business Status Reports (separate).
4. Final Report due date must be prior to POP end noted in Research Project Award and have an associated milestone dollar amount.
5. MTEC Milestone Numbers are used for administrative purposes and should be sequential.
6. Task Numbers are used to reference the statement of work if they are different from the MTEC Milestone Number.

Reporting (*The following information, if applicable to the negotiated SOW, will be provided to the Government based on negotiation*)

Report Months	Due Date
January – March	25 April
April - June	25 July
July - September	25 October
October - December	25 January

- Quarterly Reports – The MTEC research project awardee shall prepare a Quarterly Report which will include both a Technical Report and Business Status Report in accordance with the terms and conditions of the Base Agreement. (Required)
- Annual Reports – The project awardee shall prepare an Annual Report which will include both a Technical Report and Business Status Report for projects whose periods of performances are greater than one year in accordance with the terms and conditions of the Base Agreement. (Required)

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- Final Technical Report – At the completion of the Research Project Award, the awardee will submit a Final Technical Report, which will provide a comprehensive, cumulative, and substantive summary of the progress and significant accomplishments achieved during the total period of the Project effort in accordance with the terms and conditions of the Base Agreement. As part of the Final Technical Report, the awardee must submit a DD Form 882, Report of Inventions and Subcontracts. (Required)

Final Business Status Report – At the completion of the Research Project Award, the awardee will submit a Final Business Status Report, which will provide summarized details of the resource status of the Research Project Award, in accordance with the terms and conditions of the Base Agreement. (Required)

Addendum 7 – Warranties and Representations Template

Warranties and Representations Authority to Use Other Transaction Agreement

Section 815 of the National Defense Authorization Act (NDAA) for Fiscal Year 2018, authorizes Department of Defense organizations to carry out prototype projects that are directly relevant to enhancing the mission effectiveness of military personnel and the supporting platforms, systems, components, or materials proposed to be acquired or developed by the Department of Defense, or to improvement of platforms, systems, components, or materials in use by the armed forces. The law also requires one of the following conditions to be met:

- (A) There is at least one nontraditional defense contractor or nonprofit research institution participating to a significant extent in the prototype project.
- (B) All significant participants in the transaction other than the Federal Government are small businesses (including small businesses participating in a program described under section 9 of the Small Business Act (15 U.S.C. 638)) or nontraditional defense contractors.
- (C) At least one third of the total cost of the prototype project is to be paid out of funds provided by sources other than the Federal Government.

A. Prime Contractor: The prime contractor must complete the following table.

1. Legal Name:	2. UEI:
3. Point of Contact: Name, Title, Phone #, Email	
4. Prime Contractor is a nontraditional (Y/N)?	
5. Prime Contractor is a nonprofit research institution (Y/N)?	
6. Prime Contractor will provide at least one third of the total cost of the prototype project out of funds provided by sources other than the Federal Government (Y/N)?	
7. Prime Contractor is a small business (Y/N)?	

If the prime contractor has answered "Y" to question 4, 5, or 6, skip Section B and proceed to Section C.

B. Subcontractor(s)/Vendor(s): If the prime contractor is a **traditional** defense contractor and proposes the use of one or more nontraditional defense contractors or nonprofit research institutions, the following information is required **for each** participating nontraditional defense contractor or nonprofit research institution.

8. Legal Name:	9. UEI:
10. Dollar Value to be Awarded:	
11. Point of Contact: (Name, Title, Phone #, Email)	12. Task/Phase:
13. Subcontractor/Vendor is a nontraditional (Y/N)?	
14. Subcontractor/Vendor is a nonprofit research institution (Y/N)?	
15. Subcontractor/Vendor is a small business (Y/N)?	
16. Significant Contribution:	

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<input type="checkbox"/>	A - The significant contribution involves developing, demonstrating or providing a key technology. <i>Please describe what the key technology is; why it is key to the medical technology community, and what makes it key.</i>
<input type="checkbox"/>	B - The significant contribution involves developing, demonstrating or providing a new technology that is not readily available. <i>Please describe what the new part or material is and why it is not readily available.</i>
<input type="checkbox"/>	C - The significant contribution involves use of skilled personnel (such as modeling & simulation experience, medical technology design experience, etc.), facilities and/or equipment that are within the capabilities of the designated nontraditional and required to successfully complete the program. <i>Please describe the personnel, facilities and/or equipment involved in the proposed program and why they are required to successfully complete the program.</i>
<input type="checkbox"/>	D - The use of this designated subcontractor/vendor will cause a material reduction in the cost or schedule. <i>Please describe the specific cost or schedule impact to be realized</i>
<input type="checkbox"/>	E - The use of this designated subcontractor/vendor will increase medical technology performance. <i>Please describe what the performance increase will be attained by the use of this designated nontraditional defense contractor</i>
1 In addition to the above please provide the following information:	
Q1	What additional capability beyond those described in A through E above does this subcontractor/vendor have that is necessary for this specific effort?
A1	
Q2	In which task/phase(s) of the effort will the subcontractor/vendor be used?
A2	
Q3	What is the total estimated cost associated with the subcontractor/vendor included in the proposal? Note: While cost is an indicator for the level of nontraditional defense contractor participation, there is no particular cost threshold required.
A3	

C. Signature

Signature of authorized representative of proposing Prime Contractor Date

Warranties and Representations Instructions

Section A must be completed for the Prime Contractor.

1. Insert prime contractor's legal name.
2. Insert prime contractor's UEI #.
3. Insert the Point of Contact (Name, Title, Phone #, Email) for the prime contractor.
4. Indicate Yes (Y) or No (N) if the prime contractor is a nontraditional defense contractor (Note: A nontraditional defense contractor means an entity that is not currently performing and has not performed, for at least the one-year period preceding the issue date of the solicitation, any contract or subcontract for the Department of Defense that is subject to full coverage under the cost accounting standards prescribed pursuant to Section 1502 of Title 41 and the regulations implementing such section.).
5. Indicate Yes (Y) or No (N) if the prime contractor is a nonprofit research institution.
6. Indicate Yes (Y) or No (N) if the prime contractor will provide at least one third of the total cost of the prototype project out of funds provided by sources other than the Federal Government (i.e., will the project contain at least 1/3 cost share).
7. Indicate Yes (Y) or No (N) if the prime contractor is a small business (including small businesses participating in a program described under section 9 of the Small Business Act (15 U.S.C. 638)).

Section B must be completed if the Prime Contractor is **traditional** and has proposed nontraditional defense contractors, nonprofit research institutions, or small businesses. Copy, paste, and complete the table found in Section B **for each** participating nontraditional defense contractor, nonprofit research institutions, or small business.

8. Insert subcontractor/vendor's legal name.
9. Insert subcontractor/vendor's UEI #.
10. Insert the dollar value (cost and fee) to be awarded to the subcontractor/vendor.
11. Insert the Point of Contact (Name, Title, Phone #, Email) for the subcontractor/vendor.
12. Indicate in which specific task/phase(s) of the effort will the subcontractor/vendor be used.
13. Indicate Yes (Y) or No (N) if the subcontractor/vendor is a nontraditional defense contractor (Note: A nontraditional defense contractor means an entity that is not currently performing and has not performed, for at least the one-year period preceding the issue date of the solicitation, any contract or subcontract for the Department of Defense that is subject to full coverage under the cost accounting standards prescribed pursuant to Section 1502 of Title 41 and the regulations implementing such section.).
14. Indicate Yes (Y) or No (N) if the subcontractor/vendor is a nonprofit research institution.
15. Indicate Yes (Y) or No (N) if the subcontractor/vendor is a small business (including small businesses participating in a program described under section 9 of the Small Business Act (15 U.S.C. 638)).
16. Explain the subcontractor/vendor's Significant Contribution to the project by answering the questions below.

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- A - The significant contribution involves developing, demonstrating or providing a key technology. ***Please describe what the key technology is; why it is key to the medical technology community, and what makes it key.***
- B - The significant contribution involves developing, demonstrating or providing a new technology that is not readily available. ***Please describe what the new part or material is and why it is not readily available.***
- C - The significant contribution involves use of skilled personnel (such as modeling & simulation experience, medical technology design experience, etc.), facilities and/or equipment that are within the capabilities of the designated nontraditional and required to successfully complete the program. ***Please describe the personnel, facilities and/or equipment involved in the proposed program and why they are required to successfully complete the program.***
- D - The use of this designated subcontractor/vendor will cause a material reduction in the cost or schedule. ***Please describe the specific cost or schedule impact to be realized.***
- E - The use of this designated subcontractor/vendor will increase medical technology performance. ***Please describe what the performance increase will be attained by the use of this designated nontraditional defense contractor.***
- Q1 - What additional capability beyond those described in A through E above does this subcontractor/vendor have that is necessary for this specific effort?
- Q2 - In which task/phase(s) of the effort will the subcontractor/vendor be used?
- Q3 - What is the total estimated cost associated with the subcontractor/vendor included in the proposal? Note: While cost is an indicator for the level of nontraditional defense contractor participation, there is no particular cost threshold required.

Section C must be signed by an authorized representative of the prime contractor.

General Guidance

- Nontraditional defense contractors can be at the prime level, team members, subcontractors, lower tier vendors, or "intra-company" business units, provided that the business unit makes a significant contribution to the prototype project.
- All nontraditional defense contractors must have a UEI number.
- A foreign business can be considered a nontraditional if it has a UEI number and can comply with the terms and conditions of the MTEC Base Agreement.

Addendum 8 – TASK 2 ONLY: Task 2 Application Form

WWSDP APPLICATION FORM				<i>See page 66 of the RPP for instructions and Privacy Act Statement</i>	
SECTION I – APPLICANT INFORMATION					
1. NAME OF ORGANIZATION <i>(As it appears in SAM.gov)</i>			2. UEI		
ORGANIZATION STRUCTURE: <i>(please indicate one of the following)</i> <input type="checkbox"/> Nontraditional Defense Contractor <input type="checkbox"/> Traditional Defense Contractor <input type="checkbox"/> Nonprofit Research Institution <i>*Refer to Addendum 2 for additional guidance*</i>					
3. OFFICE ADDRESS <i>(Street, City, State, Zip Code)</i>					
STREET	CITY	STAT E	ZIP	TIME ZONE	
4. POINT OF CONTACT					
NAME <i>(Last, First, Middle Initial)</i>		TELEPHONE NUMBER		EMAIL	
SECTION II – EXPERIENCE AND EXPERTISE					
					<i>Enter number</i>
5. SERVICE DOGS TRAINED IN THE LAST 36 MONTHS					
6. SERVICE DOGS GRADUATED IN THE LAST 36 MONTHS					
7. SM TRAINED IN THE LAST 36 MONTHS					
8. SM GRADUATED IN THE LAST 36 MONTHS					
9. SM CURRENTLY IN TRAINING					
10. SM WAITLIST					
11. LAWS THAT GOVERN SERVICE ANIMALS <i>(Continue in Section VII if needed)</i>					

<p>12. LAWS THAT GOVERN INDOOR AND OUTDOOR HOUSING OF ANIMALS <i>(Continue in Section VII if needed)</i></p>		
<p>13. OTHER SERVICE DOG INDUSTRY LAWS <i>(Continue in Section VII if needed)</i></p>		
<p>SECTION III – PROGRAM</p>		
<p>14. FACILITY UNITS <i>(Select all that apply. Use Section VII for details)</i></p>		
	YES	NO
ONE MULTIPURPOSE AREA		
BREAK ROOM/RECREATIONAL ROOM		
DEDICATED CLASSROOM		
DEDICATED TRAINING FLOOR		
DORMATORIES <i>(Detail number and amenities)</i>		
GROOMING ROOM		
KENNEL ROOM <i>(Detail room size and number of kennels)</i>		

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LAUNDRY ROOM		
OFFICES <i>(Detail number and type)</i>		
OUTDOORS EXERCISE/RUN AREA <i>(Indicate size):</i>		
VETERINARIAN CLINIC/HOSPITAL <i>(Detail medical equipment/services)</i>		
15. ACCREDITATIONS/ MEMBERSHIPS/ CERTIFICATIONS <i>(Select all that apply)</i>		
	YES	NO
ADI		
AKC		
ASDPMV		
IAADP		
IGDF		
IHDI		
OTHER <i>(Specify):</i>		
16. ACCREDITED TRAINERS <i>(Enter the number of trainers per accreditation)</i>		
ACCREDITATION <i>(Write name of accreditation, e.g., CCPDT)</i>	No.	

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17. CURRICULA <i>(See instructions beginning on page 66 of the RPP)</i>	YES	NO
PUBLISHED DOG TRAINING CURRICULUM		
PUBLISHED SM TRAINING CURRICULUM		
REQUIRED EXTERNAL TRAINING		
OTHER <i>(Specify)</i> :		
18. PERSONNEL <i>(Continue in Section VII if needed)</i>		
POSITION <i>(Enter number of full-and part-time staff)</i>	FULL	PART
CONTRACTING		
FINANCIAL		
MARKETING		
MENTAL HEALTH		
PUPPY RAISER		
TRAINER		
VETERINARIAN		
OTHER <i>(Specify)</i> :		
SECTION IV – SERVICE DOGS		
19. PREFERRED DOG BREED <i>(Select all that apply)</i>		
	YES	NO
GOLDEN RETRIEVER		

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LABRADOR RETRIEVER		
LAB-GOLD CROSS		
OTHER (<i>Specify</i>):		
20. PREFERRED DOG SOURCE (<i>Indicate the source of at least 66% of your dogs</i>)		
	YES	NO
BREEDER-OWN		
BREEDER-OTHER		
DONATION		
SHELTER/RESCUE		
VET OWNED/PET		
OTHER (<i>Specify</i>):		
21. LOCATION OF TRAINING PRIOR TO MATCHING (<i>Indicate the location of training, at least 66% of the time</i>)		
FACILITY		
PRISON		
HOME (PUPPY RAISER)		
OTHER (<i>Specify</i>):		
N/A (<i>Dog/SA matched on day 1</i>):		
22. LENGTH OF DOG TRAINING (<i>From selection to graduation</i>)		MONTH S
SECTION V – SERVICE MEMBER/VETERAN (SM)		

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23. MOST COMMON DISABILITY (<i>Indicate the disability that at least 66% of your SM present with</i>)		
	YES	NO
AUDITORY		
MEDICAL (<i>indicate type</i>):		
PSYCHIATRIC (<i>indicate type</i>):		
PHYSICAL		
VISUAL		
OTHER (<i>Specify</i>):		
24. LENGTH OF SM TRAINING (<i>From entry to graduation. Select either days or mo.</i>)		DAY/MO
25. LOCATION OF TRAINING WITH DOG (<i>At least 66% of time. Not including public access</i>)		
	YES	NO
FACILITY		
PRISON		
HOME		
OTHER (<i>Specify</i>):		
SECTION VI – PROTOTYPE NARRATIVE PLAN		
26. CURRENT IMPLEMENTATION OF PROTOTYPE GUIDELINES (<i>See instructions beginning on page 66 of the RPP</i>)		
GUIDELINE	YES	NO
2.1.1		
2.1.2		

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2.1.3		
2.1.4		
2.1.5		
2.1.6		
2.1.7		
2.1.8		
2.2.1		
2.2.2		
2.3.1		
2.3.2		
2.3.3		
2.3.4		
2.3.5		
2.3.6		
2.3.7		
2.3.8		
2.3.9		
2.3.10		
2.3.11		
2.3.12 (<i>as applicable</i>)		
2.4		

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2.5.1		
2.5.2		
2.5.3		
2.5.4		
2.5.5		
2.6		
2.7		
2.8		
2.9		
3.1		
3.2		
3.3		
3.4		
3.5		
4.1 <i>(Enter N/A in YES if not relevant)</i>		
4.2		
4.3		
5.1		
5.2		
5.3 <i>(Enter N/A in YES if not relevant)</i>		
5.4		

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5.5		
5.6		
5.7		
5.8		
5.9	N/A	N/A
5.10		
5.11		
5.12 – 5.15	N/A	N/A
5.16		
5.17	N/A	N/A
5.18		
6.1		
6.2		
6.3		
6.4		
6.5		
6.6 <i>(Enter N/A in YES if not relevant)</i>		
6.7		
6.8		
6.9		
6.10		

6.11		
6.12		
<p style="text-align: center;">SECTION VII – ADDITIONAL COMMENTS</p> <p><i>(Prior to making a comments, note the section and block you are addressing, for example Section VI, block 23. See page 66 of the RPP instructions)</i></p> <p><i>Offerors are encouraged to address factors that protect the safety of the service dogs, SM, and the public. Offerors should also demonstrate their aptitude to engage in a robust academic debate related to the benchmark guidelines.</i></p>		

PRIVACY STATEMENT

AUTHORITY: 10 U.S.C. 2113(g)(1)(A).

PRINCIPAL PURPOSE: Used by nonprofit 501(c)(3) organizations to apply for the MTEC WWSDP contract.

ROUTINE USES: Information provided by Offerors is used to:

- a. Verify eligibility for WWSDP contract.
- b. Assist the technical review team in determining competitiveness for the WWSDP contract.

DISCLOSURE: Voluntary, however, failure to disclose information may result in delay or rejection of application.

INSTRUCTIONS

SECTION I – APPLICANT INFORMATION

1. NAME OF ORGANIZATION. Write the name of the organization as it appears in SAM.gov. Also indicate the entity type as it relates to the Other Transaction authority (i.e., nontraditional defense contractors, nonprofit research institution, etc.). Applicants may indicate more than one type, as appropriate.

2. UEI. Write the 12-character alphanumeric Unique Entity ID (UEI) assigned to you by SAM.gov. Note. DUNS is no longer a valid identifier.

3. OFFICE ADDRESS. Write the organization’s office address (Street, City, State, Zip). In the case of multiple locations, enter the address of any future site visit. Also, select the appropriate time zone (Eastern, Central, Mountain, Pacific).

4. NAME OF POINT OF CONTACT. Write the name (last, first, middle initial), telephone number (including area code), and email of the point-of-contact for this contract.

6. SERVICE DOGS GRADUATED IN THE LAST 36 MONTHS. Enter the total number of service dogs that your organization graduated in the last 36 months. Restrict total to teams that completed all required training and certifications. Dogs in training should be excluded regardless of matched status. This total is not restricted to service dogs intended for veterans only, but must not include facility or companion dogs.

7. SM TRAINED IN THE LAST 36 MONTHS. Enter the total number of service members or veterans (SM) that you trained in the last 36 months. This total should include SM currently in training, regardless of matched status.

8. SM GRADUATED IN THE LAST 36 MONTHS. Enter the total number of service members or veterans (SM) that you graduated in the last 36 months. Restrict total to SM that completed all required training and certifications. SM that graduated with facility or companion dogs must be excluded.

9. SM CURRENTLY IN TRAINING. Enter the total number of service members or veterans (SM) currently that you are currently training. This total should include all SM

<p>SECTION II – EXPERIENCE AND EXPERTISE</p> <p>5. SERVICE DOGS TRAINED IN THE LAST 36 MONTHS. Enter the total number of service dogs you trained in the last 36 months. This total may include dogs matched, but not graduated. It is not restricted to service dogs intended for veterans only, but must not include facility or companion dogs.</p> <p>10. SM WAITLIST. Enter the total number of service members or veterans (SM) that are currently waiting to start training. This total should not include any SM currently in training regardless of matched status.</p> <p>11. KNOWLEDGE OF LAWS THAT GOVERN SERVICE ANIMALS. List all the animal control, safety, or public health regulations or statutes you use to guarantee the safety of your dogs, SM, public, and staff. If not applicable, write NONE. Note. Use bulleted format.</p> <p>12. KNOWLEDGE OF LAWS THAT GOVERN INDOOR AND OUTDOOR HOUSING OF ANIMALS. List all the regulations or statutes you use to govern the housing of your service animals. If not applicable, write NONE. Note. Use bulleted format.</p> <p>13. KNOWLEDGE OF OTHER SERVICE DOG INDUSTRY LAWS. List all other published laws, regulations, or statues (not mentioned in section 11 or 12) that govern your interaction with your service dogs or SM.</p> <p>SECTION III – PROGRAM</p>	<p>currently in training, regardless of matched status. This total is restricted to SM currently in training for a service dog, facility or companion dogs must be excluded.</p> <p>International Guide Dog Federation (IGDF); or International Hearing Dog, Inc (IHDI). If not listed, select OTHER and write the name. If in candidate status, leave blank but enter a comment in Section VII (Additional Comments). If None, leave blank.</p> <p>16. ACCREDITED TRAINERS. Enter the number of trainers per accreditation. For example: “Accreditation: CCPDT. No. 2.” You may include any industry-recognized dog training certification (see examples below) and all part- and full-time trainers employed by your organization. Animal Behavior College Dog Trainer (ABC DT) Clothier Animal Response Assessment Tool (CARAT) Certification Council for Professional Dog Trainers® (CCPDT) International Association of Canine Professionals (IACP) National Association of Dog Obedience Instructors (NADOI)</p> <p>17. CURRICULA. Indicated Yes (Y) or No (N) for each of the following questions and provide details. PUBLISHED DOG TRAINING CURRICULUM. Do you use an external published curricula to train your dogs? If yes, provide citation. PUBLISHED SM TRAINING CURRICULA. Do you use an external</p>
--	---

14. FACILITY UNITS. List facility rooms used to support training and canine care. If you have one large space, select ONE MULTIPURPOSE AREA and explain what services are provided in this area in Section VII. Otherwise, each selection must represent a separate room(s) with distinct functions. Use Section VII to provide specific details, as required, for each category.

15. ACCREDITATIONS/ MEMBERSHIPS/ CERTIFICATIONS. Indicate if your organization has active accreditations, memberships, or certifications with:
Assistance Dogs International (ADI);
American Kennel Club (AKC);
Association of Service Dog Providers for Military Veterans (ASDPMV);
International Association of Assistance Dog Partners (IAADP);

one category and enter an explanation in Section VII. Enter additional categories in OTHER and continue in Section VII if needed.

19. PREFERRED DOG BREED. Select preference for service dog breed. If none, leave blank. If Other, select OTHER and specify breed.

20. PREFERRED DOG SOURCE. Select or enter method to obtain at least 66% of your service dogs. If no one source accounts for 66%, note main sources (e.g., 40% shelter, 30% donations) in Section VII.

21. LOCATION OF TRAINING PRIOR TO MATCHING. Select or enter location used to train dogs prior to matching at least 66% of the time. If dogs and SM train together from day 1, select N/A.

published curricula to train your veterans or service members (SM)? If yes, provide citation.

REQUIRED EXTERNAL TRAINING. Do you require your SM to take external training (e.g., college course, pet first aid/CPR certification, etc.)?

If you use other curricula, select OTHER and specify.

SECTION VI – PROTOTYPE NARRATIVE PLAN

18. PERSONNEL. Enter the number of full- or part-time staff supporting your organization. Do not include the same person in multiple categories (e.g., Contracting and Financial). Instead, select

26. CURRENT IMPLEMENTATION OF PROTOTYPE GUIDELINES. Indicate if you are currently implementing (YES) or not implementing (NO) the entirety of each listed prototype guideline (Addendum 4, MTEC-23-07-WWSDP, Number W81XWH-15-9-0001). For each NO answer, provide a plan to implement, test, and evaluate the guideline in Section VII. Be brief, but provide enough specificity to integrate, test, evaluate your plan.

SECTION VII – ADDITIONAL COMMENTS

Use this block to enter remarks in bulleted format. Precede each remark with section and block number (e.g., Section V, block 23. 50% mobility, 50% hearing). Add as many pages as needed using a 12-point font, single-spaced, single-sided, 8.5 inches x 11 inches page with 1 inch margins on all sides (top, bottom, left, and right). Attach these pages to this form by converting all pages into a single pdf document.

22. LENGTH OF DOG TRAINING. Enter average length of dog training (in months) from selection of dog to graduation of dog-SM team.

SECTION V – SERVICE MEMBER/VETERAN (SM)

23. MOST COMMON DISABILITY. Select or enter the primary reason SM seek your services at least 66% of the time. Secondary, or associated, symptoms should not be noted. For example, presenting with PTSD should be noted as PHYCHIATRIC, not MOBILITY. If the reason fails to meet 66%, note reasons and distribution (e.g., 50% and 50% or 33%, 33%, and 33%) in Section VII. For PHYCHIATRIC and MEDICAL, enter the specific disability (e.g., PTSD or diabetic alert).

24. LENGTH OF SM TRAINING. Enter average length of SM training, in days or months, from SM selection to SM graduation. If dog and SM train together from Day 1, this block and block 22 must be identical.

25. LOCATION OF TRAINING. Write the location of SM raining after matching, at least 66% of the time. Do not include public access training locations.

Addendum 9 – TASK 2 ONLY: Budget Narrative

Use of this template is mandatory for all Task 2 Offerors. Applications not meeting the format or content requirements prescribed in the RPP and this document may be deemed nonresponsive and removed from consideration.

The Budget Narrative must address all of the elements listed in this template as applicable.

All proposed costs (both direct and indirect) must be:

- associated with integrating and evaluating the draft benchmark during the award period of performance,
- described and justified in detail,
- include enough detail to show how the estimates were calculated or determined, and
- listed in whole US dollars.

All budget/cost information provided in the Budget Narrative must be consistent with the information provided in the Application Form and MTEC Cost Formats (Addendum 8).

This document must be submitted in one Word or PDF document.

Budget Narrative

Applicant Organization		
Total Proposed Budget	Total Direct Costs	Total Indirect Costs
\$	\$	\$

Costs by Category

Provide details and cost estimates for each of the following Object Class Categories (i.e., budget categories), as applicable. As applicable for each category, provide (1) total, direct, and indirect costs, (2) brief narrative describing the rationale for each expense in the category. This rationale must describe how funds will be used to integrate, test, and evaluate the prototype guidelines (for example, new 3 kennels are required to comply with 9 CFR 3.6 and 9 CFR 3.8 requirements). *Note: construction costs are not applicable for this funding opportunity and should not be included.* Enter N/A if a budget category does not apply.

1. Labor

List the labor costs for each individual working on the project and include the percentage of effort for each.

2. Fringe Benefits

Provide the rate and the budget categories to which it is applied.

3. Travel

Provide estimated costs and details for each trip including number of travelers, number of days, costs for lodging, transportation, per diem, purpose of trip, etc. Specifically, please include an estimate for one team member to travel to Bethesda to attend a 2 day focus group towards the end of the period of performance.

4. Material/Equipment/Supplies

List items, quantity, and estimated costs (for example, canine food, kennels, canine acquisitions, or training equipment)

5. Contractual

Provide estimated costs for subcontracts, consultants, etc.

6. Other Direct Cost

Costs in this category may include items such as trainer education, related purchases not already included, veterinary expenses, housing, etc. Applicants that have never received a WWSDP grant must provide estimated costs (if any) that may be required if the applicant is selected for a site visit. For estimating purposes, assume a 1-day site visit by 1 USU official.

7. Indirect Rate

Provide either the applicant's Federally-approved indirect cost rate. If using an approved rate, the application must include a copy of the certified rate agreement and contact information for the cognizant Government audit agency. If the Offeror does not have approved rates, provide detailed supporting data to include (1) indirect rates and all pricing factors that were used; (2) methodology used for determining the rates (e.g., current experience in the Offeror's organization or the history base used); and, (3) all escalation, by year, applied to derive the proposed rates. If computer usage is determined by a rate, identify the basis and rationale used to derive the rate.

8. Cost Share

If cost share is proposed, the following must be provided:

- A description of each cost share item proposed;
- Proposed Dollar Value of each cost share item proposed; and
- The Valuation Technique used to derive the cost share amounts (e.g., vendor quote, historical cost, labor hours and labor rates, number of trips, etc.).

Addendum 10 – TASK 2 ONLY: Cost Proposal Format

THIS PAGE IS INTENTIONALLY LEFT BLANK. PLEASE SEE ATTACHEMENT 1 – TASK 2 MTEC COSTS FORMATS

Addendum 11 – Stage 2 Evaluation Criteria

For Information Only - Stage 2 Requirement (subject to change)

Stage 2

The MTEC Consortium Manager (CM) will evaluate the cost proposed together with all supporting information for realism (as applicable, dependent upon contract type, i.e., Firm Fixed Price, Cost Reimbursement), reasonableness, and completeness as outlined below. The MTEC CM will then provide a formal assessment to the Government at which time the Government will make the final determination that the negotiated project cost is fair and reasonable.

a) **Realism.** Proposals will be evaluated to determine if Costs are realistic for the work to be performed, reflect a clear understanding of the requirements, and are consistent with the various elements of the Offeror's technical approach and Statement of Work.

Estimates are “realistic” when they are neither excessive nor insufficient for the effort to be accomplished. Estimates must also be realistic for each task of the proposed project when compared to the total proposed cost. For more information on cost realism, please refer to the MTEC PPG.

The MTEC CM will make a determination by directly comparing proposed costs with comparable current and historical data, evaluator experience, available estimates, etc. Proposed estimates will be compared with the corresponding technical proposals (Enhanced White Papers) for consistency.

b) **Reasonableness.** The Offeror’s cost proposal will be evaluated to determine if it is reasonable. For a price to be reasonable, it must, in its nature and amount, represent a price to the Government that a prudent person would pay in the conduct of competitive business. Normally, price reasonableness is established through cost and price analysis.

To be considered reasonable, the Offeror’s cost estimate should be based upon verifiable techniques such as estimates developed from applicable and relevant historic cost data. The Offeror should show that sound, rational judgment was used in deriving and applying cost methodologies. Appropriate narrative explanation and justification should be provided for critical cost elements. The overall estimate should be presented in a coherent, organized and systematic manner.

Costs provided shall be clearly attributable to activities or materials as described by the Offeror. Costs should be broken down using the Cost Proposal Formats that are located on the Members-Only MTEC website. If the MTEC template is not used, the Offeror should submit a format providing for a similar level of detail.

c) **Completeness.** The MTEC CM will evaluate whether the proposal clearly and thoroughly documents the rationale supporting the proposed cost and is compliant with the requirements of the solicitation.

The proposal should clearly and thoroughly document the cost/price information supporting the proposed cost in sufficient detail and depth. The MTEC CM will evaluate whether the Offeror's cost proposal is complete with respect to the work proposed. The MTEC CM will consider substantiation of proposed cost (i.e., supporting data and estimating rationale) for all elements.

Rate and pricing information is required to properly perform the cost analysis of the proposal. If the Offeror is unwilling to provide this information in a timely manner, its proposal will be lacking information that is required to properly evaluate the proposal and the proposal cannot be selected for award.

Government Access to Information

After receipt of the cost proposal and after the CM's completion of the cost analysis summarized above, the government may perform a supplemental cost and/or price analysis of the submitted cost proposal. For purposes of this analysis, the Agreement Officer and/or a representative of the Agreement Officer (e.g., DCAA, DCMA, etc.) shall have the right to examine the supporting records and/or request additional information, as needed.

Best Value

The overall award decision will be based upon the Government's Best Value determination and the final award selection(s) will be made to the most advantageous offer(s) by considering and comparing factors in addition to cost or price. The Government anticipates entering into negotiations with all Offerors recommended for funding with the MTEC CM acting on the Government's behalf and/or serving as a liaison. The Government reserves the right to negotiate and request changes to any or all parts of the proposal, to include the SOW.

Addendum 12 – BIDS Instructions

THIS PAGE IS INTENTIONALLY LEFT BLANK. PLEASE SEE THE PRESENTATION BELOW.