

PART 1 – THE SCHEDULE

SECTION C – DESCRIPTION/SPECIFICATIONS/STATEMENT OF WORK

SINGLE FAMILY HOUSING NATIONAL LENDER TRAINING CONFERENCE SUPPORT

I. Background

During calendar year 2008, FHA conducted a National Lender Training Conference designed to give members of the home mortgage industry a more thorough and consistent understanding of the Federal Housing Administration's (FHA's) policies, procedures, requirements and goals with respect to FHA's Single Family mortgage insurance programs. The trainers were senior FHA staff members from the Headquarters Office of Single Family Housing and the four Homeownership Centers (HOCs). The training included sessions on how to remain in good standing as an FHA-approved lender, credit underwriting, insurance endorsement, the TOTAL Scorecard, appraisal policies and procedures, quality control and lender monitoring, Neighborhood Watch and Credit Watch Termination, Real Estate Owned (REO) procedures, servicing, loss mitigation requirements, and demonstrations on using FHA's Single Family Housing websites.

Additional National Training Conferences are needed due to the growing and constantly changing universe of lenders and because, notwithstanding the extensive training conducted by each HOC, the current level and type of training currently provided is not fully responsive to the needs of lenders and Single Family Housing's other industry partners.

II. Objective

The objective of this procurement is to obtain support for a redesigned Single Family Housing National Lender Training (NLT) Conference. The Contractor shall, coordinate logistical arrangements for the event, to include but not limited to, the securing of a venue for this event, providing audio-visual equipment for the event, updating the Participant and Instructor Training Manuals used during the 2008 National Lender Training Conference, provide new handout materials to include agendas using information provided by FHA, and provide training conference support for a Single Family 2009 National Lender Training Conference for approximately 600 persons to be held during the month of August or September 2009 in Atlanta, GA.

III. Scope of Work

The Contractor shall design a two and one-half day training Conference for 600 participants, with concurrent workshops, each of which are to accommodate up to 120 participants, taking into consideration, among other things, the results of an assessment of registrants of the 2008 National Lender Training Conference, a Homeownership Center/Lender focus group and FHA staff.

The Conference shall be structured so that interested parties may only attend those breakout sessions in which they have an interest. The individual workshops shall be independent of each other but share a commonality of approach on how the agenda is laid out, the room setup and the training material structure,.

The Contractor shall coordinate with the GTR to make logistical arrangements for the event, to include but not limited to, the securing of a venue for this event, coordination of audio-visual equipment for the event, update the Participant and Instructor Manuals developed for the 2008 Training Conference, develop a handout package for each workshop, and prepare evaluation forms and advertising materials. The design of the materials shall share a commonality of approach and design.

The Contractor shall handle all activities required to provide support for one National Lender Training Conference during the month of August or September 2009 in Atlanta, GA, including locating a hotel which can accommodate the training session, handling the advertisement, collecting and analyzing evaluation forms submitted by participants and instructors. The Contractor shall prepare a final, comprehensive evaluation report of the Training Conference. FHA will provide the instructors for each of the workshops.

IV. Tasks

The Contractor shall be responsible for the completion of the following tasks:

1. The Contractor shall locate at least 3 hotels in Atlanta, GA that are suitable and available to hold the NLT Conference. Following review and approval by FHA of the recommended sites, the Contractor shall secure the site selected by FHA for the NLT Conference.
2. The Contractor shall design a structure/agenda for the training Conference that indicates the dates, times and length of each workshop, and an outline of the topics to be covered.
3. The Contractor shall develop a registration plan and prepare the materials, including a brochure for registration of the training conference. The Contractor also shall independently identify and perform outreach to mortgage industry associations, trade groups, and other relevant organizations, as agreed to by the GTM and/or GTR.
4. The Contractor shall design a Conference folder and the handout materials using as a possible source, information provided by FHA. The participant package shall include a brief description of the training conference, a complete course outline, at-a-glance workshop descriptions that spell out the competencies to be attained and which also may serve as dividers for workshop handouts, and training evaluation forms for instructors and participants in each workshop and the overall training. The Contractor shall design and provide a Training Attendance Certificate to each participant who turns in an evaluation form. Hardcopy handouts will be distributed during the actual workshop. The handouts related to the workshops can consist of slides or note slides that are typically used for workshops.
5. The Contractor shall facilitate and/or make arrangements for the Participant Training Manual to be made available on the HUD web for access by participants after training completion. The contractor might be required to have background investigation completed prior to gaining access to government's information systems, which may take up to a minimum of 60 days
6. The Contractor shall insert materials provided by FHA into the existing Participant and Instructor Training Manuals and make changes as necessary to the slides and format to make the design and

content consistent and coherent for both participants and instructors. The Contractor shall develop a PowerPoint presentation, handout materials, and an evaluation form for participants and instructors for each Workshop. All presentation materials must be in Microsoft PowerPoint 2007, with 2003 compatibility or the current HUD approved software used by Single Family Housing at time of delivery. All training materials must meet the Aviation Industry CBT Committee (AICC) standards and Instruction Design Rules related to adult learning theory, performance oriented instructional objectives, frequency and type of learner interaction and assessment strategy. The training materials (including participant packages, handouts and presentation slides) shall be in a format conducive for learning and use as a reference tool for adults (e.g., Information Mapping or other format where there is white space for note taking). Materials should be designed for easy reading and prepared in a standard font size that will not cause eyestrain. Electronic materials shall be in a format that can easily be placed on the HUD intranet.

7. The Contractor shall coordinate with an accrediting organization to ensure that continuing education credit is offered to attendees of the conference. The Contractor shall submit a final report which should include Continuing Education Unit accreditation activity.

8. The Contractor shall be expected to provide Training Conference support during the Conference. The Contractor shall prepare identification badges, consistent with the Conference theme, for all trainers, guests and registrants; assemble and provide participants with the Participant package of handouts when they register, and provide administrative information to the Conference participants. The Contractor shall prepare signage announcing the Conference that shall be posted outside of the meeting room; coordinate for access to laptops and any other equipment required for the training that is not within the scope of the hotel contract; provide a moderator during the plenary sessions and/or other staff to assist with the logistics, monitor the workshops and collect written questions for the trainers from the participants; and coordinate or assist with on-site activities as appropriate or required.

The Contractor shall submit all evaluations to the GTR/GTM and a final Conference report, which at a minimum contains an analysis of Participant and Instructor evaluations, final listings of registrants with registration information, e.g., those who attended the Conference as well as those who did not, including mailing and email addresses; and a record of issues/problems encountered and recommend solutions for future Training Conferences.

V. Progress Reporting

If requested by the GTR, the Contractor shall attend weekly meetings, via teleconference, with the GTM, and/or GTR, and other FHA staff to discuss progress, issues, concerns, and planned activities for the following week. The Contractor shall provide the agenda for each meeting. The Contractor shall also provide minutes of each meeting no later than two business days after each meeting. The GTR and/or GTM will also be taking notes

VI. Deliverables

The Contractor shall develop a detailed technical approach and timeline for the completion of this project, and submit a draft Work Plan with its proposal. The Work Plan shall consist of a narrative description and a graphic summary of the schedule and financial elements necessary to complete each subtask below. The narrative shall:

Describe the planned schedule.

Identify each step in the work process required for completing the tasks delineated in the project work plan schedule (and their subtasks), and the period of time needed to accomplish each step, expressed in terms of calendar dates.

Specify the financial, human, and other resources allocated to each task and subtask in a staffing plan.

Indicate the methods and resources that shall be used to ensure completion of all project deliverables. The final Work Plan shall be delivered within the timeframes as noted in the delivery schedule.

All products delivered specifically for this contract shall be delivered to the GTR and/or GTM. The Contractor shall provide eight (8) hard copies, and submit electronic copies of all deliverables. The Contractor shall provide eight (8) CD copies, of all the approved final registrations. Without exception, all final deliverables will be in a format consistent with HUD standards and as described in this contract.

The GTR and/or GTM shall review the deliverables and provide comments to the Contractor within the timeframe established in the delivery schedule. If any changes are made during this final review, the Contractor shall incorporate these changes and the GTR will approve the final draft within the prescribed timeframe established in the delivery schedule.

The table below summarizes the timeline for deliverables:

Task	Deliverable	Due Date (After Contract Award)
IV.A. Project Work Plan		
Submit Draft Project Work Plan	Draft Work Plan	Submission with Proposal
Submit Revised Draft Work Plan.	Revised Project Work Plan.	TBD (2 weeks after contract award)
GTR and/or GTM provide feedback on Project Work Plan		TBD (2 days after receipt of revised draft work plan

Submit Final Work Plan		TBD (2 days after GTR/GTM feedback)
Task	Deliverable	Due Date (After Contract Award)
<p>IV.B.1. Conference Site</p> <p>Identify sites within parameters identified by FHA for Conference and provide cost breakdown for conference space, AV and other equipment, etc.</p> <p>GTR and/or GTM review and provide written approval of site for conference.</p> <p>Submit draft hotel contract.</p> <p>Contracting Officer, GTR and/or GTM and other HUD staff to review and provide written approval of draft contract.</p> <p>Contractor to execute contract with hotel.</p>	<p>Report with findings, recommendations, basis for recommendations, cost breakdown</p> <p>Draft contract</p> <p>Copy of executed contract between Contractor and hotel</p>	<p>TBD (2 weeks after Contract Award)</p> <p>TBD (3 days after Contractor delivers Report with findings)</p> <p>TBD (2 days after GTR/GTM approval)</p> <p>TBD (2 days after draft hotel contract is submitted)</p> <p>TBD (4 days after approval of draft contract)</p>
<p>IV.B.2. Outreach Feedback Results</p> <p>Submit report with feedback from telephone interviews, Single Family focus group and others and incorporate into Conference design as appropriate</p> <p>GTR and GTM review and written approval of analysis results and recommendations.</p>	<p>Written report that includes analysis of interview results and specific recommendations from Single Family focus groups and other outreach activities</p>	<p>TBD</p> <p>TBD</p>

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Task	Deliverable	Due Date (After Contract Award)
<p>IV.B.3. Conference Structure/Agenda Design</p> <p>Using information obtained from FHA, develop outline of structure for Conference workshops.</p> <p>GTR and/or GTM review and approval of outline of structure/topics for Conference workshops.</p>	<p>Outline of recommended Conference structure and design</p>	<p>TBD (30 days after contract award)</p> <p>TBD (5 days after receipt of conference structure outline)</p>
<p>IV.B.4,5,6. Registration Plan, Material and Website Support</p> <p>Submit proposed registration plan for Training Conference including: graphics design for materials including brochure design and distribution; cover for participant package; plan for aiding to put Participant Manual on the web.</p> <p>GTR and/or GTM review and approval of proposed registration plan, materials coordination and website support.</p> <p>Facilitate the process of Posting information on a website to include registration for Training, Conference and hotel information.</p> <p>GTR and/or GTM review and approval of website plan.</p> <p>Contractor shall facilitate the incorporation of recommended</p>	<p>Draft proposal and materials</p> <p>Final plan/brochure and active final website</p>	<p>TBD (30 days after contract award)</p> <p>TBD (5 days after receipt of draft proposal and material)</p> <p>TBD (10 days after GTR/GTM approval)</p> <p>TBD (2 days after receipt of website plan)</p> <p>TBD (3 days after receipt of GTR/GTM</p>

changes to website and produce brochure.		approval
Mail brochures.	Complete mailing of brochures	TBD

Task	Deliverable	Due Date (After Contract Award)
<p>IV.B.7. Instructional materials & forms</p> <p>Submit updated Participant Training Manual, Instructor Manual, PowerPoint presentation for each workshop, handout materials and evaluation forms for each workshop and the overall Conference.</p> <p>GTR and/or GTM review and written approval of above submitted materials.</p>	<p>Revised Participant Training Manual, Instructor Manual, PowerPoint presentations for each workshop, and evaluation forms for each workshop and the overall Conference</p>	<p>TBD (60 days after Contract Award)</p> <p>TBD (2 weeks after submittal of instructional materials & forms)</p>
<p>IV.B.9,10. Conference Support</p> <p>Submit Support Staffing Plan for providing Conference support.</p> <p>GTR and/or GTM review and written approval of Conference support plan.</p> <p>Submit Final Conference Support Staffing Plan.</p>	<p>Draft Plan</p> <p>Final Plan</p>	<p>TBD (2 weeks after Contract Award)</p> <p>TBD (3 days after submission of Support Staffing Plan)</p> <p>TBD (2 days after GTR/GTM approval or Support Staffing Plan)</p>
<p>IV.B.8. Final Report</p> <p>Final Report including final report of Continuing Education Unit accreditation activity.</p>	<p>Written report</p>	<p>TBD (30 days after conference completion)</p>

VII. Process of Review

As materials are completed, they shall be provided to the GTR and/or GTM for review and approval. If changes are required, they will be forwarded via fax and/or email. All training materials, reports, and other deliverables shall be provided to the GTR/GTM by the timeline and/or date specified on the Project Work Plan for review and approval.

The GTR and/or GTM are the Government officials responsible for accepting all work and deliverables on behalf of the Government under the contract, for approving all payments for work, and for performing contract administration actions. The GTR/GTM are the Government officials responsible for day-to-day interaction with the Contractor on the technical aspects of the project. Final acceptance of all deliverables shall be subject to a quality review to be performed by the GTM and/or the GTR. The GTR will rely on the advice of the GTM, if one is assigned in forming assessments of the quality of work and deliverables.

The Contractor shall respond to comments received within the specified time in Section VI, Deliverables. There will be one cycle of review for each deliverable, except in the instance when the Contractor has failed to respond positively to comments provided by the Government.

Upon final review and approval, all deliverables in electronic format shall be compatible with the HUD software platform and shall be easily downloadable in the format of the source files so that the materials may be easily restructured and customized by HUD staff for unique training sessions. Further, all deliverables shall consist of:

8 CDs with the training materials in Microsoft Word 2007 with MW 2003 compatibility word processing software and presentation software or the current HUD-approved software used by Single Family Housing at time of delivery. Software must be compatible with the HUD software platform.

All final materials become the property of the U.S. Department of Housing and Urban Development upon delivery for its unlimited use without restriction.