

# Planning, Inc.

Training • Leadership • Security

Service Disabled Veteran Owned  
www.planprograms.com



## CAPABILITIES STATEMENT

### **I. Introduction**

Planning, Inc. is a minority-owned, service-disabled veteran-owned small business specializing in human resource consultation, training, security services, and payroll delivery. We have been in business since 1982, providing education to U.S. government agency employees on federal retirement benefits, financial and estate planning, health and wellness, transition planning, leadership development training, and succession planning. In 2010, we broadened our portfolio to include training in the areas of physical and cyber security. In 2011, Planning was awarded its first security systems contract and since then we have been awarded numerous additional security system contracts with various federal agencies. Our success is the result of building solid teaming arrangements with highly qualified companies that specialize in security systems maintenance, design and installation. In 2022, Planning again broadened our corporate services by introducing a payroll vertical that was specifically created to assist Veterans Medical Healthcare Centers with their compensated work therapy programs.

On January 1st, 2023, The U.S. Small Business Administration Certified Planning, Inc. As a Service-Disabled Veteran Owned Small Business. An SDVOSB certification allows the government agency the opportunity to award Planning, Inc. sole-source and set-aside contracts across the federal government.

### **II. Offered Services**

#### **Retirement and Leadership Seminars:**

Our Training seminars are conducted by skilled Subject Matter Experts with over 30 years of experience from public and private service and provide customized or off-the-shelf training. Our seminars are flexible and are tailored to meet the needs of our client agencies. They are delivered by subject matter professionals using mixed audio/visual support and organized around specifically designed modules (seminar length and topics selected by agencies). We can deliver seminars in-person or in Virtual format (Adobe Connect).

Examples include:

*Federal Retirement Benefits* – CSRS and/or FERS Benefits as applicable - inclusive of FERS/RAE and FERS/FRAE; FEHB; FEGLI; FSAFEDS; FEDVIP; FLTCIP; Social Security and Medicare.

*Financial and Tax Planning* – Financial Goals; Budgets; Consumer Credit Management; Risk vs. Reward; the TSP; Investing Beyond the TSP; Maximizing Savings; Insurances – types and needs; 529 Plans; Other Savings; Tax Planning Strategies; etc.

*Estate Planning* – Planning for incapacity: Powers of Attorney, Living Wills and Advance Medical Directives. Ownership of property, the probate process and the importance of Trusts. Estate, inheritance and gift taxes.

*Health and Wellness* – Stress Management; Nutrition; Fitness for Life

*Transition Planning* – Psychological Aspects of Change; Forging New Identities; Preparing for the Next Phase of Life; Interests; Skills; Abilities; Mentoring, Volunteering, etc.

*Work Life Balance* – Practical information; Working from Home; Multitasking; Stress Factors.

*Executive Education* – This consists of executive education, facilitation and related decision support services to organizations engaged in leadership development.

*Executive Coaching* – We facilitate learning and behavioral results for clients by enhancing their awareness of their own strengths and weaknesses, the needs of the organization and their ability to establish and sustain collaborative relationships and manage progress and accountability.

*Leadership Assessment* – This identifies leadership gaps and strengths and focuses training initiatives on developing strengths and filling in gaps.

*Succession Planning* – We provide a nationally recognized faculty of Human Capital Management and Leadership Succession Planning experts to assist clients with the identification, development and training of next generation leaders.

Current/Recent Contracts:

- Contract # HM047613F0242 National Geospatial-Intelligence Agency (Issued August 7, 2019, 1 Base year, 4 1-year options)
- Contract # 2031JW20F000144 Office of the Comptroller of the Currency (Issued July 22, 2020, 1 Base year, 4 1-year options)
- Contract # NCUA23A00001 National Credit Union Administration (Issued January 1, 2023, 1 Base year, 4 1-year options)
- Contract # 2043FY-23-F-00054 IRS (Issued June 29, 2023, 1 Base year, 3 1-year options)
- Contract # 12319823P0010 USDA (Issued September 29, 2023, 1 Base year, 2 1-year options)

Previous Contracts:

- Contract #1333BJ22F00054004. United States Patent & Trademark Office, Retirement and Financial Literacy Seminars (Issued July 9, 2018, 1 Base year, 4 1-year options)
- Contract # 47HAA018A0209. General Services Administration OHRM, Early Career, Mid-Career and Pre-Retirement Planning Seminars (Issued March 14, 2022, 1 Base year, 4 1-year options)
- Contract #24617P2939 – VISN 6 VA Medical Centers, Federal Benefit Retirement Seminars (Issue April 2017, 1 Base year, 4 1-year options)
- Contract # CORHQ15C0574 – Federal Deposit Insurance Corporation DOA/ASB, Mid-Career and Pre-Retirement Planning Seminars. (Issue September 2015, 1 Base year, 4-1-year options).
- Contract # M0026418F0418 – United States Marine Corps, Retirement Planning Seminars (Issued August 2018, 1 Base year, 3-1-year options)
- Contract #541C80353/36C25018F2175 – VISN 10 VA Medical Centers, Federal Benefit Retirement Seminars (Issued April 2018, 64 Retirement Seminars)

## **Security Services:**

Our team works with the public and private sector providing quality technical support and services that meet and exceed our clients' requirements in the maintenance and repairs of security systems. Planning, Inc.'s experience spans several years and provides comprehensive security system design, installation, training and support. Our expert technical partners provide recommendations and solutions to our clients to ensure optimal performance of their individual security systems. Our experience includes all aspects of (PACS) Physical Access Control System, (VMS) Video Management System and (IDS) Intrusion Detection Systems. Representation of example of major brands in our past performance include Lenel, Honeywell, Software House, Milestone and AMAG.

Our services are performed by system certified technicians and include:

### **On-Going Service of the Site's Physical Security Program by Providing –**

- Integrated Security Surveillance System Design and Installation
- Program Management
- Hardware and Software Modifications & Maintenance
- Specialty Locks (Electronic, Mechanical, Hybrid)
- End user system training
- Preventative Maintenance
  - Premium Software Support agreements with Software Manufacturers
  - Complete Review and Certification of the Correctness of Established Configuration Management Information and Engineer Drawings
  - Back-up Security System Databases on a Pre-determined Schedule
- Emergency Maintenance Service (available 24/7)
- Non-Emergency Maintenance and Repair
- Repairs, Realignments and Installation (hardware/software)

### **Current/Recent Contracts:**

- Contract #36C25722Q0800 - VAMC Amarillo, TX (Issued January 2023, 1 Base year, 4-1-year options)
- Contract #FA850120Q0018 - USAF WRAFB (Issued Aug 20, 2020, Base plus 4 years)
- Awaiting Award on Specialty Lock Rekey Contract (1 year & 1 month)

### **Previous Contracts:**

- HC1028-18P-005 – DISA EWISS (Issued October 16, 2017, 1 Base year, 4-1-year options)
- VA25115C0071 - VAMC Detroit, MI, Maintenance of CCTV System (Issued May 2015, 1 Base, 4-1-year options)
- VA24617P1268- VAMC Tuskegee, AL, Panic Alarms for CAVHS East Campus (Issued April 2017, 1 Base Year)

## **Compensated Work Therapy Payroll (CWT) Services:**

Our team works with the Veteran Affairs Medical Centers in providing quality support and services that meet and exceed our clients' requirements in the creation, data management, and delivery of payroll services. Our services are performed by expert Program Managers and Certified Financial Planner, services include:

On-Going Service of the CWT Payroll Programs Requirements by providing –

- Data Management and Security
- Payroll Processing Services:
  - Weekly Customized Payroll Processing up to \$40,000, to include up to 140 printed checks and a hard copy check register delivered to the customer destination.
- Payroll Funding Services:
  - Funding up to \$160,000/month (\$40,000/week) in a secure, local bank account which will cover the total amount of checks per month and week.
- Emergency Services (24/7-365 Response):
  - Prompt response to same day requests to stop payment, issue new checks, or issue additional checks to current or new payees.
- Customer and Participant Documentation and Reporting Services:
  - Internally, keep an updated weekly earnings report detailing the pay each veteran receives per week and on a fiscal basis. Provided to participants upon request.
- Vendor and Customer Relationship Management:
  - Establish a local banking relationship with fee-free check cashing services.
  - 24/7 Customer Response to swiftly resolve issues.
- Quality Control and Quality Assurance

Current/Recent Contracts:

- 36C24123P0105 – Boston VA Healthcare System CWT Payroll Program (Issued November 2023, 1 Base year, 4-1 year options)

**III. Address, Contact and Profile Information**

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Steve Lapointe, CWT - Chief Financial Officer – [steve@planprograms.com](mailto:steve@planprograms.com)

<u>Business Size</u>	<u>Business Type</u>
Small/<\$7.0M	Corporate Entity (not tax-exempt) CVE-SBA VetCert Verified Service-Disabled, Veteran-Owned Small Business
NAICS Codes:	541611, 541612, 541690, 611430, 611710, 561621, 541214, 524292, 561990
GSA MAS	47QRAA24D00DB (Expiration September 5, 2029) Maximum Ordering Threshold (\$1,000,000) Federal Discount: .05% if paid within ten (10) days of invoice date Schedule Related Fees: .0075% (included in cost of seminar)
EIN:	52-2254450
DUNS:	196085997
CAGE:	1MZR5
UEI:	V1L2KFHCLSJ4
SAM:	Active. Valid through August 28, 2025