



GSA

*F*unctional  
*O*verview of  
*R*esources,  
*U*tilities, and  
*M*ethodologies

A Product of the  
FTS Solutions Development Centers  
January, 2002

**FORUM** - a uniquely  
interactive approach  
to FTS!

## **Executive Summary**

FORUM (**F**unctional **O**verview of **R**esources, **U**tilities, and **M**ethodologies) is a one-day highly interactive learning environment designed to be conducted at FTS central, regional, and field offices for groups to include representation from the SDCs and CSCs with a total of 10-15 attending each session. FORUM focuses on both the broad and specific elements of using FTS Contracts. FORUM is designed around FTS Contracts with direct application of theory, practical examples, and case studies and consists of two half-day sessions which can be taken as a whole or in segments. FORUM contains a morning session which presents background on FTS, from our authority to FASA/ITMRA/Economy Act, the FTS Concept of Operations, and the FTS SDCs products and ordering procedures. FORUM'S afternoon segment highlights the practical side of FTS Contract issues in the context of case studies by bringing to light lessons learned and best practices. Case studies are drawn from operational examples and scenarios and include topics centered around developing acquisition strategies, debriefs, logical follow-on, etc. FORUM is designed for those new to GSA FTS as well as experienced project managers and contracting officials.

## Table of Contents

|   | <u>Page</u> |
|---|-------------|
| <b>Part I</b>   |             |
| FTS Authority   | 4           |
| Operation of GSA's Government-wide Information Technology Programs<br>under the Clinger-Cohen Act of 1996 | 5           |
| FTS Mission, Vision, & Guiding Principles   | 8           |
| Federal Acquisition Streamlining Act (FASA, 1994)   | 10          |
| Performance-Based Initiative  | 11          |
| GSA FTS Solutions Development Centers, (SDCs) Concept of Operations                                       | 12          |
| ANSWER SDC  | 14          |
| FEDCAC SDC  | 16          |
| ITAC SDC  | 18          |
| Small Business SDC  | 19          |
| Customer Support Centers (CSCs)   | 20          |
| <b>Part II</b>  |             |
| Discussion Topics:  |             |
| Comparative Contract Analysis   | 23          |
| Acquisition Strategy  | 26          |
| Issuing the Task Order Request  | 27          |
| Oral Presentations  | 28          |
| Evaluating Proposals  | 29          |
| Debriefs  | 30          |
| Protest   | 31          |
| Logical Follow-On   | 32          |
| Teaming and Subcontracting  | 33          |
| Performance-Based Contracting   | 34          |
| Technical Refreshment   | 35          |

## **PART I**

 **Background**

 **Authority**

 **Principles**

 **Organization**

## FTS Authority

GSA, through the Federal Technology Service (FTS), supports other agencies' needs for information technology and telecommunications, both Government-wide and on an individual agency basis.

From 1965 until 1996, GSA was the sole Government-wide authority for the acquisition, use, and management of information technology and telecommunications. The authority was set forth in Section 111 of the Property Act and was referred to as the Brooks Act (40 U.S.C. §759). The Brooks Act was repealed in 1996 by the Clinger-Cohen Act, which vested Government-wide responsibility for information technology in OMB (Pub. L. 104-106, Feb. 10, 1996).

1. GSA's authority for information technology resources, including telecommunications, flows primarily from two sections of the Clinger-Cohen Act:

- (a) Section 5112(e) of the Clinger-Cohen Act of 1996 (40 U.S.C. §1412(e)), and
- (b) Section 5124(b) of the Clinger-Cohen Act of 1996 (40 U.S.C. §14249(b)).

2. (a) Information Technology

Section 5112(e) authorizes the Director of OMB to designate "executive agents" for the acquisition of Government-wide information technology resources. On August 2, 1996, OMB designated GSA as an executive agent for information technology resources for all of GSA's existing Government-wide IT programs that were funded through the Information Technology Fund on a reimbursable basis. This designation was recently extended through April 1, 2002.

(b) Telecommunications

Section 5124(b) authorizes GSA to continue to operate and manage the Government-wide telecommunications program known as FTS2000 and its successor program. All of GSA's Government-wide telecommunications programs are authorized under this program; including FTS2000 for long distance services; FTS2001, the successor long distance program; the Metropolitan Area Acquisition (MAA) program to provide major metropolitan areas with local telecommunications services; and other "niche" contracts, such as Wireless, CINEMA, DSL<sup>1</sup>, and International Direct Dialing.

**Operation of GSA's Government-wide  
Information Technology Programs  
under the  
Clinger-Cohen Act of 1996**

**I. Statutory Authority for GSA's Government-wide Information Technology Programs.**

**A. The Clinger-Cohen Act of 1996 (40 U.S.C. 1412(e))**

Pursuant to Section 5112(e) of Division E of the Clinger-Cohen Act of 1996 (Pub. L. 104-106), codified at 40 U.S.C. 1412(e), the Office of Management and Budget has designated GSA as an executive agent for Government-wide acquisitions of information technology. The scope of this designation is limited to those programs funded on a reimbursable basis through the Information Technology Fund, 40 U.S.C. 757, and which have been or may be approved by OMB as part of the annual cost and capital plan for that fund.

**B. The Economy Act (31 U.S.C.1535)**

Absent more specific statutory authority, the Economy Act, 31 U.S.C. 1535, applies to interagency acquisitions of goods and services. Therefore, since GSA is operating as an executive agent for the Government-wide acquisitions of information technology pursuant to OMB's designation under the Clinger-Cohen Act, the Economy Act does not apply to GSA's information technology programs operating out of the IT Fund.

**C. Criteria for Recording Obligations (31 U.S.C. 1501)**

Subsection (a) of 31 U.S.C. 1501 prescribes specific criteria for the recording of obligations. The statute provides two criteria that must be met for an amount to be recorded as an obligation of the United States Government. First, there must be documentary evidence of a binding agreement between an agency and another person (including an agency), that is in writing and is for a purpose authorized by law. Second, the agreement must be executed before the end of the period of the availability of the funds. See 31 U.S.C. 1501(a)(1). Interagency agreements entered into under the authority of GSA's executive agent designation must meet these two criteria in order to be recorded as an obligation by the ordering agency.

**D. The Bona Fide Needs Rule (31 U.S.C. 1502)**

The bona fide needs rule applies to GSA's interagency agreements for the acquisition of information technology. 31 U.S.C. 1502 states in part that "the balance of an appropriation or fund limited for obligation to a definite period is available for payment of expenses properly incurred during the period of availability or to complete contracts properly made with that period

of availability and obligated consistent with section 1501 of this title.” **In other words, a fiscal year appropriation may be obligated only to meet a legitimate or bona fide need, arising in or in some cases arising prior to but continuing to exist in, the fiscal year for which the appropriation was made.**

### **E. Treatment of Funds – Economy Act versus the Clinger-Cohen Act**

The Economy Act requires that unobligated funds be deobligated at the end of their period of availability. See 31 U.S.C. 1535(d). Under the Economy Act, funds are not recorded as obligations by the ordering agency when transferred to the agency filling the need. Rather, funds are recorded as an obligation when the agency filling the need actually incurs the obligation by, for example, placing an order or awarding a contract for the goods and services requested.

Since GSA is operating its Government-wide information technology programs pursuant to statutory authority other than the Economy Act, the deobligation requirement of 31 U.S.C. 1535(d) does not apply to the use of GSA’s programs. Therefore, when GSA and a customer agency enter into a binding written agreement for the provision of information technology (the bona fide need) prior to the expiration of the applicable funding, the ordering agency can record the agreement as a proper obligation against its books, and the funds remain available into the next fiscal year to meet the bona fide need identified in the agreement.

## **II. Mechanics- What every interagency agreement should include**

### **A. Authority**

The interagency agreements (IA) between GSA and our customer agencies must cite the Office of Management and Budget’s September 23, 1998 designation of GSA as a executive agent for Government-wide acquisitions of information technology as the authority for the IA.

### **B. Bona Fide Need**

The IA must articulate a bona fide need of the customer agency for that fiscal year. The bona fide need language identifies the requirement(s) that GSA is to fill/provide to the customer agency. It is analogous to a “statement of work”. The language should identify a set of supplies or services that an agency needs. It can not be so general or generic that it does not identify a set of requirements that the customer agency needs.

### **C. Funding**

The IA must identify the funding for the bona fide need. The funding may cover a portion of the work with additional funding being made available for the agreement via later transfer from the agency to GSA as performance continues. Any later transfers of funds must comply with the bona fide needs rule. The IA obligates the funding and accordingly, the customer agency should record as a valid obligation those funds identified in the IA.

**D. Signatures**

The IA must include signatures of the appropriate officials from GSA and the customer agency.

**E. Military Interdepartmental Purchase Requests (MIPRs)**

MIPRs must comply with the bona fide needs rule. The MIPR should contain a statement identifying the customer agency's requirement. It should be a concise, clear statement that identifies the need and the associated funding.

## Federal Technology Service Mission, Vision, and Guiding Principles

### Mission Statement

Our business is to provide information technology solutions and network services that deliver best value and innovation to support our customers' missions worldwide.

### Vision Statement

World-class services and solutions for the 21<sup>st</sup> century.

### Guiding Principles

- **First** and foremost, FTS is an employee centric organization. Our employees are our most precious assets and we must invest in them. We must give them the tools, training, and workplace needed to succeed.
- **Second**, information technology companies and telecommunications companies are our partners. Their success is critical to our success. We must create win-win situations with them and must have an environment of mutual trust and respect.
- **Third**, loyal customers are absolutely essential for our success. We must focus on thrilling the customers and developing customer loyalty. We must continually strive to not only retain current customers, but also to attract new ones and obtain their loyalty.
- **Fourth**, we must grow the business responsibly. We must continue to grow our business but we must grow our business responsibly. Responsibly means: We must not take unacceptable risk and we must not put our employees at unacceptable risk; We must ensure our infrastructure keeps pace with our growth; We must ensure that our revenue growth is consistent with healthy financials and ensuring that our customers are getting the best value; and We must focus on savings and the effective use of competition in the marketplace.
- **Fifth**, even though we look and operate much like a business with an entrepreneurial spirit, we should never forget that above all else we are public servants in service to our country and the American people. We serve a public policy role, have governmental responsibilities, and must make the Administration's priorities our priorities and commit to our Nation's priorities.
- **Sixth**, we are one FTS and one GSA and must always understand how our individual actions and decisions impact FTS and GSA. We must never forget that we succeed only by sharing, by caring about each other, and by working together toward common goals.

- **Seventh**, we must continually recognize and understand that we are an evolving and maturing organization. Our industry and technology are changing at rapid rates. Our customers must adapt to an ever-changing government. We must understand that this requires planning, forward thinking, and new ideas, and that the systems, methods, concepts, and ideas that worked yesterday may not work today and will not work in the future.

## **Federal Acquisition Streamlining Act (FASA, 1994)**

The Federal Acquisition Streamlining Act (FASA) authorizes the use of multiple award contracts. These contracts allow the Government to acquire an indefinite quantity, within stated limits, of supplies or services during a fixed period, with deliveries or performance to be scheduled by placing orders with the contractor. Thanks to the clarification provided in FASA, agencies can now use these contracts with greater confidence and, at the same time, realize the benefits of an ongoing competitive environment throughout the duration of the contract while minimizing the delays of conducting a separate procurement for each requirement.

In order for agencies to take continuous advantage of the benefits of competition after contract award, FASA provides that agencies may make multiple awards of task and delivery order contracts for the same or similar supplies or services (and from the same solicitation) to two or more sources. The use of multiple award contracts allows agencies to take continuous advantage of the competitive forces of the commercial marketplace which will result in lower prices, better quality, reduced time from requirements identification to award, and improved contractor performance in satisfying customer requirements. By offering market competition on price and technology for each order, multiple award contracting provides Contracting Officers (COs) with the flexibility needed to better match the dynamics of the IT market.

### **Benefits of MA/IDIQ Contracts**

- Significant cost savings resulting from economies of scale
- Provides for continuous competition (maintaining fair opportunity)
- Implements the principles of streamlining and innovation
- Provides for multiple proposals offering end users a variety of choices
- Incentivizes contractor performance through annual past performance reviews
- Maintains a pool of highly qualified service providers
- Creates an environment where task orders are not protestable

## Performance-Based Initiative

The GSA's Executive Agency Letter dated September 29, 2000, highlights the principle that "performance-based work statements should be used to define tasks in sufficient detail to permit orders to be awarded on a fixed price basis to the maximum extent practicable." FAR 37.102 Policy states that performance-based contracting is the preferred method for acquiring services. When acquiring services, including those acquired under supply contracts, agencies must use performance-based contracting methods to the maximum extent practicable. In addition, agencies must use the following order of precedence:

- (i) A firm-fixed price performance-based contract or task order
- (ii) A performance-based contract or task order that is not firm fixed-price
- (iii) A contract or task order that is not performance-based

### Description of Performance-Based SOW

- List the tasks the contractor must accomplish – the "what" not the "how" – this is sometimes referred to as the "do-what" approach (i.e. compile atmospheric data, perform statistical analysis of data, author recommendation for application of data)
- Emphasize the outcomes, not the procedures
- For services, describe the kind of service, the duration, and the output
- Use verbs to describe tasks
- Describe deliverables in terms of outcomes
- Establish standards for acceptance of each task on a measurable level

Note: For more information on Performance-based Service Contracting, see website:  
<http://www.arnet.gov/library/OFPP/BestPractices/BestPPBSC.html>

## **GSA FTS Solutions Development Centers, (SDCs) Concept of Operations**

### **Background**

In 1998, GSA's Federal Technology Service decided to entrust the development, modification, and administration of FTS contracts to new organizations, known as Solutions Development Centers. It was also determined that there would be four SDCs. These SDCs are located in Region 9 (ANSWER SDC), Region 4 & 7 in combination (ITAC SDC), Region 6 (Small Business SDC), and FEDCAC in the Washington DC area. Only FEDCAC existed before 1998, the other three new organizations took shape in late 1998 and early 1999.

Solutions Development Centers are chartered with the development of Information Technology Solutions, awarding and administering contracts, on behalf of GSA FTS, or for Government-wide use. SDCs are also chartered to award and administer task orders, provide acquisition consulting, and/or award a contract or Blanket Purchase Agreement (BPA).

### **Operational Philosophy**

The operational responsibility of the Solutions Development Centers (SDCs) is to develop solutions to satisfy Federal Technology Service (FTS) client requirements. The SDCs are responsible for understanding clients and their missions, goals, objectives, and requirements. As centers of expertise, the SDCs must be knowledgeable of the IT industry and available government IT contracts. Further, the SDCs are tasked with being knowledgeable of the needs of the client community and the technology to support that community.

The SDCs advocate a philosophy of partnership; a partnership with the Client Support Centers (CSCs), a partnership among the SDCs, an internal partnership within each of our organizations, as well as with our industry partners. The SDCs advocate FTS growth and serve our mutual clients.

Operationally, the SDCs focus attention towards continually architecting innovative contracts and providing consultative support in the most effective use of acquisition best practices.

SDCs exercise a leadership role in dealing with the Office of Management and Budget (OMB), General Accounting Office (GAO), and the Office of Inspector General (OIG) on behalf of the CSCs and FTS management. In this role, the SDCs promote a positive image of FTS as a leader in Government-wide information technology acquisition.

In the spirit of the Concept of Operations (CONOPS) the client is first and foremost. The SDCs support the CONOPS. The business model incorporated in the CONOPS is sound. It establishes sales groups, service delivery groups, product development groups, and client choices, including the opportunity to buy through direct order/direct bill (DO/DB) arrangements. Our philosophy is to provide the client with the best solution to meet their needs. The end user client community is

therefore entitled to the support of the CSCs as well as the option of delegated authority to direct order.

SDC marketing endeavors are focused on opportunities to effectively promote FTS IT acquisition solutions. The SDCs provide the CSCs with quality IT acquisition vehicles, consultative support, and education. From a perspective of business values, the SDCs will continue to seize every opportunity possible to advocate the value-added service of the CSCs. To this end, any request for a delegation of contract authority will be coordinated with the appropriate CSC. In those cases where the customer elects to use only a direct order direct bill, (DO/DB), arrangement, the SDC will provide the appropriate training and issue the requested delegation.

The client base for the SDCs is both FTS CSCs and other agencies via a DO/DB arrangement. Though to date we have not actively sought DO/DB business, we recognize this as a potential market share that has yet to be tapped by FTS.

**SDCs are chartered to:**

- Understand the missions, goals, objectives and requirements of federal clients
- Maintain a knowledge base of the IT Industry and available government contracts
- Possess a full complement of technical, acquisition, and cost and pricing expertise
- Award Government-wide Acquisition Contracts (GWACs)
- Issue and manage task orders
- Award small contracts and BPAs for specific clients
- Award large IT contracts for specific client agencies
- Provide acquisition consulting

## ANSWER SDC

The ANSWER Solutions Development Center (ANSWER SDC) offers efficient, responsive, and professional support for all Information Technology (IT) acquisition needs by awarding and managing contracts that address the entire spectrum of IT.

The ANSWER SDC provides several avenues for clients to access FTS products and services through our diverse portfolio of contract vehicles:

**ANSWER** (Applications'n Support for Widely-diverse EndUser Requirements) is a \$25 Billion MA/IDIQ contract that provides IT solutions that deliver the best value and innovation to support client missions worldwide. ANSWER provides clients with stability and continuity in the face of today's highly volatile and rapidly changing technological environment.

**Safeguard** is a \$6.75 Billion Multiple Award BPA, and is the result of the Presidential Decision Directive (PDD-63) which calls for a national effort to assure the security of increasingly vulnerable interconnected public and private infrastructures within the services and unique products necessary for strengthening the nation's defenses against unconventional threats to include terrorist attack, attacks on our critical infrastructure, and cyber attacks.

**DSL**<sup>1</sup> is a \$300 Million MA/IDIQ contract that provides government clients with a premier vehicle for acquiring DSL and other broadband services. With specific provisions outlining levels of customer service that exceed industry standards, the contract is designed to provide optimal DSL solutions at an affordable cost.

**Connections** is a comprehensive MA/IDIQ contract currently under construction. Connections is planned as a building and campus turnkey telecommunications infrastructure equipment and technical support services contract that targets local, national, and international customer requirements.

### Other Specialized Initiatives:

- Solutions Edu, which provides customized acquisition training on FTS Contracts
- Tech Refresh Summits to enhance and maintain technical currency in our contracts
- Annual past performance reviews to ensure excellent performance throughout contract life
- Regional Program Meetings (RPMs) that bring contract ownership to Regional CSCs and industry partners
- Performance-based consulting
- FORUM is a training seminar for FTS associates covering FTS authority, goals, vision and operational posture



*FORUM - a uniquely interactive  
approach to FTS!*

For more information on any of the ANSWER SDC's contract offerings, please call Mimi Bruce, ANSWER Call Center Director, at 1.877.534.2208 or email at [mimi.bruce@gsa.gov](mailto:mimi.bruce@gsa.gov).

## FEDCAC SDC

The Federal Computer Acquisition Center (FEDCAC) is a Solutions Development Center (SDC) that awards and administers IT Contracts. FEDCAC develops specific solutions for a specific client or for Government-wide use.

FEDCAC offers the following IT contracts:

**Seat Management-** This program provides Government organizations with a way to acquire managed life cycle support for their entire distributed computing environment (hardware, software and support services) from a single point of contact.

**Virtual Data Center-** This contract is a fast, low-cost alternative for obtaining commercial IBM compatible, Unisys, Digital, and Honeywell mainframe processing and data center service from experienced contractors.

**Disaster Recovery-** These contracts provide reliable, effective, economical computing and communications recovery services to the Federal Government, and other Government and non-Government organizations that process Federal and/or Federally-mandated applications. The computing and communications recovery services are used to test and refine organization's contingency plans, and to restore and recover operations in the event of a declared disaster.

**Smart Card-** The Smart Access Common Identification is your one source for secure interoperability Government ID Solutions. This Government-Wide Acquisition Contract (GWAC) awarded in May 2000 provides smart card products and services, competitively priced and supports a common, interoperable, multi-application Smart Card solution.

**ODIN-** This Outsourcing Desktop Initiative for NASA (ODIN) is an innovative outsourcing contract vehicle available to the Federal Government. The GSA offers ODIN to provide Federal clients with the option to transfer to the commercial sector the responsibility and risk for providing and managing desktop, server, and intra-center communications as assets and service for their whole organization.

**TELIS-** Addresses integrated and competitively priced solutions across voice, video, and data technologies.

**Millennia-** Millennia enables FTS to continue meeting the Federal Government's demand for large system integration and development projects by supporting its clients in a timely and cost-effective manner. The Millennia contract provides for the acquisition of new and emerging technologies that evolve over the contract life of five years, with one-five year option.

**ACES-** This contract facilitates public access to services offered by government agencies through the use of information technologies, including on-line access to computers for purposes of reviewing, retrieving, providing, and exchanging information utilizing e-commerce in a secure transaction environment through the use of certificates.

**FEDCAC also offers the following services on a reimbursable basis:**

- Technical and Acquisition Support
- Legal Support
- Cost and Pricing Expertise
- Warranted Contracting Officers

For more information about FEDCAC and its products, contact Steve Berg, Director, at [steve.berg@gsa.gov](mailto:steve.berg@gsa.gov) or Frank Strailman, Marketing Director, at [frank.strailman@gsa.gov](mailto:frank.strailman@gsa.gov).

## ITAC SDC

The Information Technology Acquisition Center (ITAC) is a Solutions Development Center that is a cooperative effort between the Southeast Sunbelt Region headquartered in Atlanta, and the Greater Southwest Region in Fort Worth. ITAC specializes in high quality IT solutions and acquisition services, and is well-recognized as a center of acquisition expertise. ITAC's staff of highly skilled IT acquisition personnel offer customized acquisition support for Government-wide or individual client's IT needs.

### Contract vehicles:

**Millennia Lite** - a performance-based MA/IDIQ contract providing a full spectrum of information technology services worldwide. The contract period is three years, with seven one-year options. The maximum dollar value of the contract is \$20 billion. Millennia Lite has over 40 contracts in four broadly defined Functional Areas. Each Functional Area has 10 to 12 contractors, at least two of which are small, small disadvantaged or small women-owned businesses. Functional Area 1 encompasses Information Technology Planning, Studies and Assessment; Functional Area 2 covers High-end Information Technology Services (HITS); Functional Area 3 includes Mission Support Services; and Functional Area 4 covers Legacy Systems Migration & New Enterprise Systems Development. Under Millennia Lite, customers have the choice of fixed price, labor hour, time and materials or cost-reimbursement task orders. To promote high quality contractor performance, options are based on contractor's performance against the Award Term Plan. A Service Improvement clause allows for continuous technology refreshment.

**Buyers.Gov** - an MA/IDIQ contract offering Reverse Auction services. Services will be obtainable on a hosted or desktop basis. In a Reverse Auction, an agency solicits bids from multiple suppliers of a product or service. Through real-time dynamic price negotiation, the suppliers bid the prices down to natural market levels. The **Buyers.Gov** contracts will be awarded in early 2002.

### Other Initiatives and Offerings :

- Negotiation and award of large dollar value contracts tailored to the specific needs of individual clients
- On-going acquisition support to FTS CSCs through the negotiation of individual customized contracts for CSC customers
- Partner with the other SDCs in presenting FORUM, a training seminar for FTS associates covering FTS authority, goals, vision and operational posture
- Acquisition consulting services and cost and pricing expertise
- Award Term provisions to ensure the highest quality contractor performance
- Performance-based contract vehicles
- Continuous technology refreshment

For more information on ITAC and its offerings, please contact Shan Clark, 817-978-3506 or e-mail her at [shan.clark@gsa.gov](mailto:shan.clark@gsa.gov). Or call toll free 1-877-929-4822.

## Small Business SDC

The mission of the Small Business Solutions Development Center (SBSDC) is to administer contracts for small business industry partners for information technology and network solutions for Government-wide use. This process allows our small business industry partners to become proven quality technology providers and allows the Small Business SDC to provide Federal agencies with innovative solutions that deliver the best value to support their missions, worldwide. Officially started in April, 1999, the Small Business SDC has an unprecedented opportunity to assist Federal agencies in meeting their procurement preference goals and to assist 8(a) small and disadvantaged businesses with competing in the Federal government market.

The Small Business SDC is an offshoot of the GSA Federal Acquisition Services for Technology (FAST) program, which was officially started in 1996. Its core operational feature is the promotion and use of 212 competitive, multiple award contracts that were awarded to 8(a) certified firms in October, 1997.

**Small Business MA/IDIQ Contracts.** The Small Business SDC took over management of these 5-year contracts for information technology systems design in April of 1999. Federal business dollars on the 212 8(a) contracts was \$13 million FY1998. In FY1999, business grew to \$74 million. Revenues in FY2000 exceeded \$200 million.

**Smallbizmall.gov.** Launched in April, 2000, this is the first government e-commerce site that focuses exclusively on 8(a) small and disadvantaged businesses available for Government-wide information technology purchasing. Federal agencies can use the Smallbizmall.gov site 24 hours a day, 7 days a week.

The mall offers the following to government buyers:

- Support small business and meet procurement preference goals
- Receipt of 8(a) credit
- Ease of use
- Short procurement lead times
- Qualified 8(a) industry partners are available
- Support for the Presidential policy for E-commerce use
- Secure transactions

For more information regarding the Small Business SDC, please contact Mary Parks, Director, at 816.823.3960, or e-mail at: [mary.parks@gsa.gov](mailto:mary.parks@gsa.gov).

## Customer Support Centers

There are eleven Regional CSCs known as Regional IT Solutions. The Regional CSCs are located throughout the country to provide for a more localized form of support to the client community.

There are three National CSCs whose projects support client requirements across the nation; the Center for Information Security Services (CISS), the Center for Innovative Business Solutions (IBS) and the Federal Systems Integration and Management Center (FEDSIM).

The following sections outline essential characteristics including duties, authorities, and responsibilities of the CSCs.

### Duties

CSCs issue and manage task orders against existing contracts, manage projects, and maintain a staff of IT managers and team/project managers. CSCs require technical, project management, and contracting expertise.

CSC personnel work directly with clients to deliver services and end products after sales have been made. The level of involvement will depend upon the nature and complexity of the solution; e.g., commodity buys require less support from a CSC.

CSCs conduct pre and post-order processing activities and maintain their own contracting staffs.

Each CSC should have as a goal the capability to resell all SDC contracts and solutions.

### Authorities

CSCs are authorized to maintain their own contracting staffs and to award small contracts and Blanket Purchase Agreements (BPAs) for specific clients wherein the client pays for all contracting and acquisition costs. These solutions are limited to that client and by definition are low dollar value. However, before such contracts or BPAs are awarded, the CSC must first consider all existing FTS contracts to determine that the client can not be served effectively using existing contracts. The CSC is required to document this analysis and must make the "business case" before proceeding. Award of basic contracts or BPAs by CSCs should be the least preferred method for providing a solution to the client.

CSCs are specifically not authorized to award Government-wide contracts, other broad-based contracts, or large IT contracts for specific clients.

### Responsibilities

CSCs are responsible for understanding clients and their missions, goals, objectives, and requirements; for developing teams that are knowledgeable of all FTS product and service offerings and solutions.

Performance evaluations of individuals within a CSC will be based primarily on client satisfaction levels and how well assigned work is performed. Evaluation criteria should be weighted away from sales and toward client satisfaction and work product excellence.

## **PART II**

**🔑 Comparative Contract Analysis**

**🔑 Acquisition Strategy**

**🔑 Issuing the Task Order Request**

**🔑 Oral Presentations**

**🔑 Evaluating Proposals**

**🔑 Debriefs**

**🔑 Protest**

**🔑 Logical Follow-on**

**🔑 Teaming and Subcontracting**

**🔑 Performance-Based Contracting**

**🔑 Technical Refreshment**

## Comparative Analysis of FTS Contracts and FSS Schedule 70 Contracts

| Comparative Elements                                     | FTS Contracts  | Schedules   |
|--|--|---|
| <b>Competitive Awards</b>                                | Competition at two levels – Full and open competition for contract award; and fair opportunity among all contract holders for task awards. Contracts are architected using acquisition teams consisting of all key stakeholders including customers, the contracting officer, representatives from the budget / finance offices, and legal counsel who clearly define requirements and consider alternative solutions. | No competition for schedule award; selective competition exists for individual task awards.   |
| <b>Protests</b>  | Task Orders NOT protestable.   | Protestable.  |
| <b>Period of Performance</b>                             | 10 years.  | Schedule contract periods are as long as 5 years with 5-year options.   |
| <b>RFP response</b>                                      | 5-days, modifiable at task order level to suit client needs and requirements. Client requirements are addressed/analyzed in a timely manner; competition is sharpened.   | No stated requirement.  |
| <b>Product flexibility for state of the art products</b> | No CBD requirement, modifications not required for material, supplies or products, no dollar limitation on materials, hardware, and software.  | Products not on GSA Schedule are “open market” and thus require a modification or must be advertised in the CBD. Modification time varies with each individual contracting officer.     |
| <b>Geographical Reach</b>                                | Worldwide. All bidders for a task order can provide support anywhere; time and coordination are saved since piecemeal procurements are not necessary.  | Not all providers offer the same level of geographical support. Support is primarily nationwide. Contractors have the choice of offering worldwide, domestic, or non-domestic delivery. |

|   |  |  |
|---|--|--|
| <b>Labor rates for Geographical Areas</b>                 | Individual rate areas defined nationwide. Rate methodology prescribed for overseas labor rates.  | One rate area nationwide. Some Contracts offer rates in specific geographic locations; overseas locations identified by contractor if offered. |
| <b>Ceiling Rates &amp; Price Reductions</b>               | Discounts from ceiling rates are negotiable at ALL dollar levels for ALL task order procurements.  | Order threshold acts as a trigger point for customers to seek additional price reductions on orders; varies per schedule contract.             |
| <b>Functional Areas</b>                                   | Specifically defined in terms of scope, technology, and applicable skill sets. All contract holders in a given contract are able to and selected to perform in all functional areas.   | Not specifically called out.   |
| <b>Technical Refreshment Clause</b>                       | Large-scale modifications to address evolutions in IT. Changes authorized to improve performance to ensure technical currency.   | None. Individual skill levels are added on a case-by-case modification basis.  |
| <b>Special Personnel Skills</b>                           | Highly specialized skills that are not explicitly defined in a skill category description can be negotiated on a task by task basis by the PCO. The newest skill requirements can be addressed in the most timely manner; the use of a new skill can be studied to determine if it qualifies to attain full contract status. | No specialty clause in the Contract. All new skill categories must be added to the Contract through modification and by the PCO.               |
| <b>Performance Oversight</b>                              | Intense and ongoing evaluation of contractors required to ensure quality performance and quality products.   | Not specifically defined.  |
| <b>Types of Task Orders</b>                               | Firm Fixed Price (FFP), Fixed Price Incentive (FPI), Fixed Price Award Fee (FPAF), Time and Material. (T&M). Cost-plus-fixed-fee(CPFF) Cost plus Incentive Fee (CPIF), Cost Plus Award Fee (CPAF). Performance-based contracting and performance metrics linked to compensation and possibilities for future awards.         | FFP, ceiling price, labor hour or T&M.   |
| <b>Order Placement (Fair Opportunity and Competition)</b> | Fair opportunity for consideration (per FAR 16.505); task order competition across ALL holders of an individual contract.  | Before placing an order, ordering officials are to consider available information of at least 3 schedule contractors. (FAR 8.404(b)(6)).       |

|                                   |  |  |
|-----------------------------------|--|--|
| <b>Performance Management</b>     | Performance management for task orders rests with delegated contracting officers and individual project managers. Contract oversight rests with the PCOs who remain responsive to both delegated contracting officers and project managers. Oversight includes performance surveys, which influence future awards and contractor compensation. | Contract oversight lies with the ordering office who has full performance management / contract management responsibility. |
| <b>Contractor Management</b>      | Program and project management defined and included in contract terms, conditions, and pricing. Provides for project delivery on time and within budget; mitigates problems, and enhances responsive and complete issue resolution.  | No requirement to provide dedicated management personnel.  |
| <b>Staffing Requirements</b>      | 30-day staffing requirement.   | No stated requirement. Negotiated separately.  |
| <b>Education &amp; Experience</b> | Contractor employees are required to meet minimum education and experience requirements. Prequalified professionals work on projects to ensure quality products in a timely manner with performers who have the right skills at the right time to do the job.  | No minimum educational and experience requirements.  |
| <b>Training</b>                   | 40 hours of on ongoing training per employee per year to keep current on leading edge and state of the art technologies. Contractor employees enhance skills to keep pace with changes in technology providing better products over the long-term.   | No requirement for ongoing training.   |
| <b>Security</b>                   | Up to top-secret clearance. All levels of security are defined prior to contract award; task orders are staffed with full and appropriate attention to national security; cost factors already included in pricing structure.  | No requirement for security clearances.  |
| <b>Monthly Reporting</b>          | Monthly financial and technical summaries are called out at contract level and already included in prices. Client remains fully apprised of project status and is able make changes in project direction.  | Priced Separately.   |
| <b>Direct Order Direct Bill</b>   | Offered on FTS MA/IDIQ Vehicles  | Schedules are direct order vehicles  |

## Acquisition Strategy

### Key Discussion Points

- 🔑 **Considering background and introductory information concerning the need for and importance of developing an acquisition strategy**
  
- 🔑 **Analyzing case study results and best practices for developing an acquisition strategy**
  
- 🔑 **Evaluating contract level implications and considerations in developing an acquisition strategy**
  
- 🔑 **Comparing one contract vehicle to another is an integral activity in developing the acquisition strategy**
  
- 🔑 **Considering the role of requirements definition and SOW generation in the acquisition strategy**
  
- 🔑 **Selecting the contract vehicle**
  
- 🔑 **Defining the task evaluation factors**

## Issuing the Task Order Request

### Key Discussion Points

- 🔑 **Considering background and introductory information concerning task order requests**
  
- 🔑 **Analyzing case study results and best practices for developing task order requests**
  
- 🔑 **Establishing timelines for responses to task order requests**
  
- 🔑 **Articulating the method of award**
  
- 🔑 **Describing the evaluation criteria in terms of relative importance and subsequent scoring**
  
- 🔑 **Providing staffing information in the task order request**
  
- 🔑 **Issuing the task order request in concert with the provisions of fair opportunity for consideration**

## Oral Presentations

### Key Discussion Points

- 🔑 **Considering background and introductory information concerning the oral presentations**
  
- 🔑 **Analyzing case study results and best practices for conducting oral presentations**
  
- 🔑 **Identifying ideal situations for using oral presentations**
  
- 🔑 **Streamlining procurement processes and the steps associated with the process of oral presentations**
  
- 🔑 **Setting up the logistics of oral presentations**
  
- 🔑 **Facilitating clarity and communication during oral presentations**
  
- 🔑 **Evaluating oral presentations**

## Evaluating Proposals

### Key Discussion Points

- 🔑 **Considering background and introductory information concerning the evaluation of proposals**
  
- 🔑 **Analyzing case study results and best practices for evaluating proposals**
  
- 🔑 **Evaluating proposals in the context of price**
  
- 🔑 **Considering G&A during the evaluation process**
  
- 🔑 **Enunciating and applying the evaluation standards**
  
- 🔑 **Considering available approaches to evaluation (low price / tech acceptable, total points, trade-off analyses)**
  
- 🔑 **Scoring proposals**
  
- 🔑 **Involving the client in the evaluation process**
  
- 🔑 **Awarding the task order**

## Debriefs

### Key Discussion Points

- 🔑 **Considering background and introductory information concerning the need for and importance of debriefs**
  
- 🔑 **Analyzing case study results and best practices for developing an effective debrief script**
  
- 🔑 **Timing a debrief**
  
- 🔑 **Identifying what can and cannot be shared in a debrief**
  
- 🔑 **Conducting the debrief**

## Protest

### Key Discussion Points

- 🔑 **Considering background and introductory information concerning protests**
  
- 🔑 **Analyzing case study results and best practices for avoiding protests**
  
- 🔑 **Understanding the situations most prone to protest**
  
- 🔑 **Evaluating contract level implications within MA/IDIQ contract vehicles**
  
- 🔑 **Protecting your client**
  
- 🔑 **Understanding the role of the Ombudsman**

## Logical Follow-On

### Key Discussion Points

- 🔑 **Considering background and introductory information concerning the concept of logical follow-on**
  
- 🔑 **Analyzing case study results and best practices for setting the stage for logical follow-on**
  
- 🔑 **Examining the contract level implications of logical follow-on in the context of initial competition**
  
- 🔑 **Understanding FAR 16.505 (b)(2) exception to fair opportunity**
  
- 🔑 **Preparing for logical follow-on**
  
- 🔑 **Providing for priced options**
  
- 🔑 **Preparing contingencies when not invoking logical follow-on**

## Teaming and Subcontracting

### Key Discussion Points

- 🔑 **Considering background and introductory information concerning the teaming and subcontracting**
  
- 🔑 **Analyzing case study results and best practices used in teaming and subcontracting**
  
- 🔑 **Evaluating contract level requirements and considerations in teaming and subcontracting**
  
- 🔑 **Adding teaming and subcontracting partners**
  
- 🔑 **Incorporating incumbent employees through teaming and subcontracting arrangements**
  
- 🔑 **Understanding the advantages and disadvantages of teaming arrangements between or among primes**
  
- 🔑 **Considering subcontracting opportunities for small / disadvantaged businesses**

## Performance-Based Contracting

### Key Discussion Points

- 🔑 **Considering background and introductory information concerning the need for and importance of performance-based contracting**
  
- 🔑 **Analyzing case study results and best practices for developing performance-based contracting**
  
- 🔑 **Evaluating contract level implications and considerations when formulating a performance-based task order**
  
- 🔑 **Creating metrics for performance-based task orders**
  
- 🔑 **Articulating performance standards in terms of quality, quantity, and timeliness related to the task requirements**
  
- 🔑 **Generating quality assurance plans and related measurements**
  
- 🔑 **Using incentives and penalties**

## Technical Refreshment

### Key Discussion Points

- 🔑 **Considering background and introductory information concerning the genesis of the technical refreshment**
  
- 🔑 **Analyzing case study results and best practices in prior technical refreshment actions**
  
- 🔑 **Examining contract level implications of conducting technical refreshment**
  
- 🔑 **Examining the roles of prime players in a technical refreshment**
  
- 🔑 **Timing a technical refreshment**
  
- 🔑 **Planning and environmental considerations in a technical refreshment**
  
- 🔑 **Implementing a technical refreshment**