



U.S. General Services Administration

Federal Acquisition Service

OASIS SB Industry Day

OASIS Program Executive Office
General Supplies and Services
Federal Acquisition Service

May 13, 2013



Agenda

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9:00 – 9:10 Welcome: Jeff Koses

9:10 – 9:20 Introductions: Jim Ghiloni

9:20 – 10:30 OASIS SB Topics

10:30 – 10:40 BREAK

10:40 – 11:30 OASIS SB Topics

11:30 – 12:00 Open Question Session



Ground Rules for Today

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- Today's purpose is to enhance understanding of what is in the draft solicitations and why it is there.
 - We are sharing our opinions...
 - You may not necessarily agree with us!
 - Everything is still in draft form and subject to change
- Everyone will treat each other with respect and professional courtesy
- We have a lot of information to cover and a limited amount of time to cover it in...
 - We have broken up the presentation into micro segments grouped by issue
 - We will entertain questions at the end of each micro segment
 - Please keep them to the point
 - Please ask for clarification purposes
 - If you want to disagree or argue, talk to us later in person later or email after today's event... we don't have time to debate today



General

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- We are issuing two contracts
 - OASIS – Full and Open unrestricted contract
 - OASIS SB – 100% Small Business Set Aside
- Register now in ITSS
- “Performance Based” is not a contract type. OCOs can make any task order performance based.
- We will make all of the edits referencing SAM
- We don’t make law or regulation, we just live with them!
- We plan to provide an updated draft solicitation that reflects all of the changes we make as a result of this process



Relevant Experience

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- Relevant Experience Minimum Standards
 - 5 Projects as a Prime Contractor
 - Projects must be a project that could have been performed on OASIS SB
 - Projects must include 3 of the 6 Core Disciplines
 - Average Annual Value of \$750,000
 - 3 of the 5 projects must be for the Federal Government
 - Must have been completed within the past 5 years or be ongoing with at least one year of performance



Relevant Experience

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- Projects are individual task orders or contracts
 - IDIQs and BPAs do not qualify, but orders placed under them do
 - We are considering allowing single award IDIQs and/or BPAs to qualify, but have not decided yet
 - We are also considering establishing points for demonstrated experience in handling IDIQ contracts
 - We will establish points for cost reimbursement experience, but haven't established point values yet
- New Scoring Thresholds:
 - \$2M – 50 points
 - \$4M – 75 points
 - \$6M – 100 points



Relevant Experience

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- We have not changed our position on teaming or the creation of new Joint Ventures nor are we likely to.
- We have not changed our position on allowing experience as a subcontractor to qualify as relevant experience
- We have not changed our position regarding relevant experience examples that could not have been performed under OASIS SB
- We will likely allow a brief description to be provided explaining how each core discipline claimed was actually provided
 - We are allowing for any contract document to be submitted as verification – this includes deliverables, reports, etc
- We are considering allowing projects for state and local government to qualify as relevant experience



Commercial Experience

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- We recognize the value of commercial work
- We have a couple of issues with commercial experience:
 - OASIS SB should not be an “Entry” vehicle
 - Gov is very different than commercial
 - On-ramping later is possible
 - We haven’t found a solution for eliminating financial interest/business relationships in evaluating past performance
 - We cannot score commercial experience equal to Gov experience until we figure out a solution
- We need your ideas/suggestions in this area.



Pools/NAICS/Core Disciplines

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- The OASIS SB Core Disciplines permeate all NAICS codes
- NAICS Codes do not define scope
 - A requirement may contain elements of many NAICS codes
 - The OCO has to choose which of those NAICS codes represents the bulk of the requirement
 - We do not create or define NAICS Codes – The Department of Commerce does
 - The NAICS code selected, no matter which one it is, has a size standard associated with it
 - We do not create or define size standards – SBA does



Pools/NAICS/Core Disciplines

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- SBA's New Rule is Coming
 - Game changer: The rule will impact all future IDIQ contracts
 - Current procedures will no longer be valid
 - The intent is to ensure that Small Business credit is accurately provided at the task order level
 - Two options for compliance:
 - Establish Pools for each and every NAICS code (20+) OR
 - Establish Pools for each size standard (6)

- We chose to go with 6!



Pools/NAICS/Core Disciplines

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- So how do the Pools work???
 - The OCO selects a NAICS code that represents the most significant anticipated cost of a requirement
 - That NAICS code has an associated size standard
 - Each OASIS SB Pool is based upon the possible size standards that could be required
 - Whichever Pool represents the size standard required is the Pool that the requirement shall be competed in
-
- That's it... There is nothing further to understand.



Pools/NAICS/Core Disciplines

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Number of Awards

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- How many awards do you anticipate on each contract?
 - We intend to make 40 awards in each Pool
 - There are 6 pools, so there could theoretically be 240 awards
 - We don't feel that there will be that many, but we have no idea how many there will be or what the average scores might be within any given Pool



Accounting Systems

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➤ Why is an Adequate Accounting System a **mandatory** requirement?

1. **FAR 16.104 Adequacy of the contractor's accounting system.** Before agreeing on a contract type **other than** firm-fixed-price, the contracting officer **shall** ensure that the contractor's accounting system will permit timely development of all necessary cost data in the form required by the proposed contract type

2. Market Research indicates **65%** of all professional service requirements awarded are **other than** firm-fixed price. **(50% Cost and 15% T&M)**

3. Other reference: See DFARs 252.242-7006 Accounting System Administration



Purchasing Systems

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- Approved Purchasing Systems are **NOT** a mandatory requirement!
- Why is an approved Purchasing Systems worth 500 points ?

FAR 44.301 The objective of a contractor purchasing system review (CPSR) is to evaluate the efficiency and effectiveness with which the contractor spends Government funds and complies with Government policy when subcontracting

➤ **Advantages:**

When a contractor has an approved purchasing system, “consent to subcontract” is **NOT** required by the Contracting Officer

*See FAR 44.202-2 regarding what “consent” entails when a Contractor does NOT have an approved purchasing system



Estimating Systems

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- Acceptable Estimating Systems are **NOT** a mandatory requirement!
- Why is an Estimating System worth **100 points**?

FAR 15.407-5 Estimating systems. “Using an acceptable estimating system for proposal preparation benefits both the Government and the contractor by increasing the accuracy and reliability of individual proposals”



Earned Value Management Systems

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- EVMS is **NOT** a mandatory requirement
- Why is EVMS worth **100 points**?

FAR 34.201 Policy. An Earned Value Management System (EVMS) is **required** for major acquisitions for development, in accordance with OMB Circular A-11. The Government may also require an EVMS for other acquisitions



Systems

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General Comments/Questions

- Too Restrictive especially for small business
- Companies can't request a DCAA/DCMA audit
- DCAA/DCMA has a backlog
- Is a DCAA/DCMA “active application” or “provisionally” approved system acceptable?
- Who is the Cognizant Auditor?
- The Gov't only awards us Firm Fixed Price
- Allow for a “third party” independent auditor
- Allow for affiliates, subsidiaries, and divisions



Systems

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ANTICIPATED PASS/FAIL CHANGES

- WE WILL ALLOW FOR PARENT COMPANY, AFFILIATES, SUBSIDIARY, AND DIVISIONS FOR ALL SYSTEMS
 - Must provide a “Commitment Letter” AND show a “meaningful relationship”
- WE WILL ALLOW FOR A THIRD PARTY INDEPENDENT ACCOUNTING FIRM (Private-Sector) **FOR ACCOUNTING SYSTEMS ONLY**
 - Must be IAW with GAAP, FAR Part 31, and SF 1408 criteria AND
- WE ARE STILL CONSIDERING IF WE WILL ALLOW “PROVISIONALLY” APPROVED SYSTEMS FROM DCAA/DCMA or other COGNIZANT GOVERNMENT AUDITOR



Systems

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ANTICIPATED POINT CHANGE

- **For Accounting Systems only:** We will give extra points (yet to be determined) for a an acceptable audited accounting system from DCAA or other cognizant Government auditor
 - Must provide actual copy of audit report with results of audit
 - Audit report usually states something to the effect: “in our opinion, Company X accounting system is adequate for accumulating and billing costs under Government Contracts”



Certifications

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➤ Certifications are **NOT** a mandatory requirement!

- CMMI Maturity Level 5 200 Points
 - CMMI Maturity Level 4 150 Points
 - CMMI Maturity Level 3 100 Points
 - ISO9001:2008 150 Points
 - AS9100 Certification 50 Points
-
- *Total Maximum Points is 400 out of 6,800 or 5.8%
 - (Subject to change in final RFP)



Certifications

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Comment: Eliminate all Certifications in Pools 1 through 3 on the OASIS SB. These certifications are unnecessary and costly for small business

Answer: If that is true, no small businesses will be displaced by another small business in regards to certifications, however, if a small business has certifications, they will be rewarded as they should be.

Question: Are certifications that are “in process” sufficient

Answer: NO



Certifications

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Comment: CMMI is for IT contracts only and OASIS/OASIS SB is not an IT contract.

Answer: CMMI originated in software but, now includes the delivery and acquisition of all kinds of services

Question: CMMI has 3 Models and 9 categories which category are you giving credit?

Answer: Anticipate giving credit to “any” model and category

Question: We do not understand how AS9100 brings value to Pools 1, 2, and 4.

Answer: Scoring is not tailored to individual pools



Certifications

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Question: Will GSA allow for a Parent, Affiliate, Subsidiary, or Division of an offer? Only ISO-9008 is held by an organization, whereas the other certifications are solely project driven.

Answer: At this current time, we expect all certifications to be in the name of the offeror on the SF 33, however we are looking into alternatives.

Question: Will you consider any other Certifications related to Professional Services?

Answer: Yes, Please let us know!



Contract Access Fee (CAF)

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- The CAF is being reviewed by GSA upper management
- We will share the plan once it is approved
- We do not plan on implementing a CAP
- We promise that the CAF will not exceed the standard GSA contract vehicle fee of .75%



Labor Categories

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- How did we select them?
 - We examined thousands of professional service labor categories currently being provided through the GSA schedules program
 - We extracted commonalities where possible
 - We mapped those back to the SOC
- There is no apparent Industry standard with regards to professional services labor categories



Labor Categories

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➤ **Changes:**

- We will likely allow for degree substitutions, but are still looking at the formula for doing so
- We are considering adding a SME for each area instead of just one overall SME

➤ **Clarifications:**

- The BLS SOC will remain the basis of the OASIS SB Labor Categories and the universal language of OASIS SB labor
- Labor categories do not map to Pools
- We do not intend on adding IT labor categories
- OASIS SB supports ALL agencies, so inclusion of some SOCs might seem peculiar
- We will NOT include non-professional labor categories at the contract level



Labor Rates

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➤ ***Changes:***

- We will update the provided direct labor rates to reflect the most recent BLS data

➤ ***Clarifications:***

- We will provide OCOs with an estimating tool that incorporates the SOC's and train them how to use the tool
- We will also train our Industry Partners how to use the tool.
- The rates provided in Attachment J.2 are DIRECT labor rates only – they are NOT fully burdened



Labor Rates

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➤ **Clarifications:**

- There is no “big brother” lurking here. We are not trying to commoditize professional services.
- We ARE trying to establish a common language so that our OCOs gain a better understanding of labor being proposed. This a major feedback point from our clients.
- OASIS SB ceiling rates ONLY apply for T&M task orders in sole source situations or situations where adequate price competition does not exist – They do not apply in any other situation. Competition at the task order level applies to all other situations.



Marketing Issues

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➤ ***Changes:***

- We are deleting the requirement for a marketing brochure

➤ ***Clarifications:***

- The website requirement shall remain



Key Personnel

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➤ **Clarifications:**

- Key Personnel do NOT have to be full time positions
- You may NOT bill the OASIS Program Office for Key Personnel
- There are no years of equivalency allowed for Masters Degrees
- Single award IDIQ contract experience is sufficient
- One person may serve both roles if properly qualified
- We expect Key Personnel to be employees



Key Personnel

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➤ **Changes:**

- We will accept certifications from alternative sources such as DAU, FAI, College Certificate programs, etc.
- We will likely provide a resume template
- We are lowering the point value of certifications for Key Personnel from 50 points to 25 points
- We are changing the standard for replacement personnel from “same or better qualifications” as the last person to “same or better qualifications” as the originally proposed person.
- We will provide approval of Key Personnel substitutions within 15 days



Past Performance/CPARS

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➤ **Changes:**

- We are considering implementing a recommendation that would provide further distinction between Offerors past performance
 - Example: 4.8 – 5.0 = 600 points; 4.6 – 4.79 = 500 points, etc.

➤ **Clarifications:**

- CPARS is preferred, but not mandatory. If CPARS is not present, then provide a survey
- We can only use information that we can validate



Ramping

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➤ *Key advantage of the OASIS SB contract*

- Will be used to keep competition levels healthy
- Will be used to replace Small Businesses who outgrow their size status
 - Size recertification occurs at the 5 year point
- Will NOT be used to allow companies to purchase their way onto the contracts



Dormant Status

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- We feel that we will never have to invoke Dormant Status on any OASIS SB contractor
- Dormant Status, if invoked, is designed to be a temporary situation
- All situations involving potential Dormant Status shall be examined on a case by case basis through interaction with the Industry Partner



Scoring System Fundamentals

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- Why Don't You Offer Points for Minimum Requirements?
 - Because it does nothing to distinguish between Offerors

- Quest for the Perfect Score
 - We do not feel that any company will receive a perfect score

- Scored Elements do not apply to all Task Orders
 - We know. This is designed to be part of the flexibility of the scoring system.



Evaluation Strategy

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- Two stage:
 - Pass/Fail
 - Scoring Mechanism
- Highest Technically Rated – Fair and Reasonable Pricing
 - Not LPTA
 - Not Tradeoff
 - Specifically authorized by the FAR
 - Appropriate for this IDIQ requirement



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Open Question Session