

BEFORE THE GENERAL SERVICES ADMINISTRATION
FEDERAL ACQUISITION SERVICE

IN THE MATTER OF:)
)
BUILDING MAINTENANCE &)
OPERATIONS SERVICES (BMO))
INDUSTRY DAY)

Atlanta Conference Room
MLK Federal Building
77 Forsyth Street, SW
Atlanta, Georgia

Thursday,
January 21, 2016

The parties met, pursuant to the notice, at
9:00 a.m.

BEFORE:

MARY SNODDERLY, Program Manager for BMO
TERESA MCCARTHY, Director of the Integrated
Facilities Management and Industrial Products
Center
JANET SCHWEER, Contracting Officer for BMO

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P R O C E E D I N G S

(9:00 a.m.)

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MS. SNODDERLY: Good morning, everybody. We have a nice crowd; glad to see that. We had to kind of shift everybody to this side, because we found out this screen doesn't work over here. So hopefully everyone can see. If not, you might want to kind of move to the middle, and if anybody is late, they can kind of sit over there where maybe it's a little harder to see.

My name is Mary Snodderly. I'm with GSA out of Kansas City. I'm going to be your facilitator today. I just want to go over a couple of housekeeping things before we get started. First of all, please silence or vibrate your phones, so that we don't get any disruptions as we go through here. If you need to step outside to take a call, that's fine, we just don't want to disrupt others around you.

Restrooms, for those of you this is your first time in the building, if you go straight out the doors to your right, you will find the restrooms then on your left.

Cafeteria, I believe if you go the same way there's an elevator and you go down the ground floor. If you want a cup of coffee or something to drink,

1 you can go down there.

2 I also want to let you know that we do have
3 a court reporter that is transcribing this event for
4 us. We will be posting those, and I'll let you know
5 where that will be posted. But just to let you know,
6 and I'll talk about that a little bit later when we
7 get to the questions and answers.

8 Also, as you came in, hopefully you were
9 asked -- if not, I'm going to ask you now -- if you
10 care if we share your email information or your
11 contact information. We see this as a networking and
12 we've had people ask if they can get an attendee list.

13 If you do not want that shared, please let us know at
14 registration and we will mark it down not to share it.

15 And for those that are government, we won't
16 necessarily share the government emails, if we have
17 any government folks in the audience; but we know that
18 sometimes to do the solution you need to partner with
19 other companies, so we want to do that.

20 With that said, right now I'm going to
21 welcome up the Region IV administrator, Mr. Torre
22 Jessup.

23 MR. JESSUP: Good morning. How many people
24 are here from North Carolina? All right. What about
25 Georgia, South Carolina and Florida? Okay. So all

1 states are represented in this particular zone, so
2 that's good. I appreciate those who are traveling
3 from parts of the zone who had to weather some storm
4 or some bad weather, had to get through that. I
5 appreciate you being here. I hope it's really worth
6 your while; I think it will be worth your while. But
7 I just wanted to take a moment to say welcome to you.

8 This is the Martin Luther King Federal
9 Building, as you know, the first building named after
10 Dr. Martin Luther King.

11 We're pretty proud of this building. It's a
12 topnotch facility, it's one that was renovated back in
13 2011. And it's served the Atlanta community in many
14 different ways, but initially as a post office and
15 then as an immigration office. And now it is the home
16 of GSA Region IV Headquarters, and hopefully soon, as
17 we make some changes, we'll be home to another federal
18 agency, at least one more federal agency as well.

19 We hope you'll take an opportunity to look
20 at some of the really, really nice artifacts that are
21 on the wall that represent a timeline of Dr. Martin
22 Luther King's civil rights journey. And this is the
23 birthplace of Dr. King, so it's kind of fitting that
24 you're here during the week of the holiday.

25 But at the same time, this is really

1 important work that our team is doing to make sure
2 that we're rolling out a new approach to how we do
3 strategic sourcing. And I hope that you will be very
4 attentive to the information that's being shared; ask
5 great questions, because those great questions lead us
6 to the best product possible.

7 So we're relying on you to ask the
8 questions that you have. No question is a bad
9 question, as my teachers used to say, you know, don't
10 be afraid to ask questions. That's why we're here,
11 we're here to learn and we're here to learn from you.

12 We're here to make sure that you learn about this
13 opportunity, but also, we're here to learn from you at
14 the same time.

15 So thank you for being here. Safe travels
16 to those of you who are headed north, and much success
17 to your day. Thank you.

18 MS. SNODDERLY: Thank you, Mr. Jessup.

19 Okay. Let's just talk for a second about
20 what we're going to go through today. Hopefully
21 everybody is here for the buildings, maintenance and
22 operations, BMO industry day. And this is primarily
23 BMO services that we're going to be talking about. As
24 you can see, we're going to do, obviously, a welcome,
25 some opening comments. I'm going to talk a little bit

1 about category management. It kind of gives you the
2 background to the whole, where BMO fits; and then talk
3 about the BMO overview and kind of give you some
4 background. Particularly if this is the first time
5 you've heard this, I think this will be helpful.

6 Then Janet is actually going to go through
7 the acquisition solution, and that's going to be the
8 meat and potatoes of the whole thing, why you're here,
9 basically go through the draft RFPs that are out
10 there. We'll talk a little bit about next steps, then
11 we're also going to talk a little bit about our
12 acquisition gateway, and I'm not going to steal my
13 thunder there, and then we are going to allow some
14 time for some questions and answers.

15 And you heard Mr. Jessup say we want that
16 feedback, and that is definitely -- we want to hear
17 from you, you'll have the opportunity. What we do ask
18 is that you hold your questions until we get to the
19 end, and then we are going to ask you to state your
20 name and your company. Again, this is because we have
21 a court reporter and we want to make sure that we get
22 all that down in our transcripts.

23 Our transcripts then and the slide deck
24 that you see up here will be posted to our BMO
25 Interact page. And if you don't know what Interact

1 is, I've got the website, I think, coming up on one of
2 the last slides so you'll be able to copy that down
3 and be able to access that.

4 Okay. With out further ado, I'm actually
5 going to welcome Teresa McCarthy. She is the director
6 of the Integrated Facilities Management and Industrial
7 Products Solutions Center. Did I get that correctly?

8 That's a long name, and she's my boss, so I've got to
9 make sure I get that right. So Teresa.

10 MS. MCCARTHY: I want to welcome everyone
11 here today. I know the weather is not quite
12 cooperative with us, but it's so nice that you've
13 braved the storms and gotten here to join us today.
14 The weather isn't great today, but when I left my
15 house in Kansas City it was three degrees. So that's
16 okay, I don't mind a little rain at all.

17 So we're really delighted to be here with
18 you today at this industry exchange. And that's what
19 we want is an industry exchange. As you know, we're
20 going to have questions and answers at the end, but we
21 learn from you. We want to partner with you and we
22 want to be in collaboration with you so that we can
23 come up with a really good product that's needed for
24 the nation.

25 Before I get started, I want to introduce,

1 as you've met Mary Snodderly, she's the program
2 manager for BMO. And then Janet Schweer, who is one
3 of our contracting officers for BMO. And you know,
4 I'm the oversight but they do the work, so I'm really
5 tickled that they could come provide you some
6 information.

7 Before we get to the briefing though, I
8 want to take the opportunity to thank all of our GSA
9 associates that are here, and especially Mr. Jessup
10 that briefed us this morning. We've had some great
11 logistical support, and so I want to take my time to
12 thank them for that.

13 This exchange and information sharing is
14 one of five events that we're doing. We were in San
15 Francisco earlier in the week, we're going to be in
16 Boston next week, and Fort Worth as well, and Kansas
17 City after that. You don't need to attend all of
18 these events, thank goodness. We'd love to have you
19 if you want to go; but you don't need to attend all
20 these events, because the information that we share is
21 going to be exactly the same. And the questions and
22 answers, as Mary let you know, will be posted so that
23 you can also learn from the other zonal areas. We
24 also will post the slide deck so that you can have
25 that to refer to if you want to so that you'll have

1 that available.

2 For several months now, we've been working
3 on this initiative, a little more than seven months,
4 it's actually almost two years, and throughout that
5 time we've worked with industry to try to find out do
6 we have good RFP. We've gone out with RFIs, requests
7 for information, we've sent draft RFPs out. We've had
8 industry exchange days, and we've also had questions
9 and answers, several hundred, as a matter of fact, on
10 Zone 1. So the information is out there if you need
11 it. We can all learn from it.

12 And of course, we'll entertain any
13 questions that you have today, and don't worry about
14 being repetitive because we always learn something
15 from these questions.

16 Currently, well, we have six zones, and how
17 did we determine that? We did a lot of market
18 research and a lot of spend analysis to find out where
19 our customers are spending money for these type of
20 services, so that's how we broke up the zones. And
21 currently we have our first zone we're getting ready
22 to award a contract in the East Coast area, and that
23 contract we're in source selection right now and
24 hopefully in a couple of weeks we'll have a viable
25 solution. And as I was talking to somebody in the

1 crowd, I had the opportunity to meet at least a few of
2 our industry partners here today when we first
3 started. And we do have customers waiting on this
4 vehicle, so it's a wonderful opportunity.

5 The success of this initiative relies on
6 the partnership with industry and with the federal
7 government, and we went into that and I discussed with
8 you all of our interactions with federal with
9 industry. And this is a great opportunity for us to
10 work in collaboration with you.

11 Finding out from industry what are the best
12 practices and whatnot is what we need to do. And
13 we've tried to do that, but we need your help. We
14 have posted a draft RFP for this zone. If you haven't
15 seen it, please go out. We're going to cover a lot of
16 that today, but you can always gain more information
17 from what's out there, and if you have questions, we'd
18 love to have your responses on that. If you have
19 questions or concerns, we want those so we can address
20 those.

21 Again, we rely on you. I'm just delighted
22 that we've got a nice crowd here today, and I wish you
23 all the best of luck. And with that, I'm going to
24 turn this over to Mary, who's going to continue the
25 briefing. So thank you very much for coming today.

1 MS. SNODDERLY: Thank you, Teresa.

2 I know we've got several microphones up
3 here, and they will come to good use when we get to
4 the question and answer period, so hopefully we won't
5 have a lot of feedback here.

6 Okay. As I mentioned when I went over the
7 agenda; I'm going to talk a little bit about category
8 management, and give you kind of some background as to
9 where we are and how we got to BMO.

10 So what is category management? So let me
11 kind of start out by defining category management.
12 Category management is a strategic and systematic
13 approach to purchasing that is widely used in the
14 private sector. Many of your companies may use
15 strategic sourcing. It focuses around defining and
16 organizing products and services that behave in a
17 similar manner into logical groupings and managing
18 these categories as strategic business units.

19 Okay, now, how does the federal government
20 fit into this? We actually are looking and feel like
21 that it is good to implement within the federal
22 government so that we can buy smarter and actually be
23 more like a single enterprise. That way we can
24 actually use all the leveraging of the entire
25 government, versus agency by agency by agency.

1 You can see up here on the slide, I'm not
2 going to spend a whole lot of time on category
3 management, I just want to make sure that you have a
4 background, and again kind of where it all fits. But
5 you can see on the slide here where we talk about the
6 elements of category management and what they involve,
7 which includes identifying, aggregating and analyzing
8 the spend data and information for a defined category.

9 And this is so that we can better understand agency
10 needs and priorities by the category, and then we can
11 develop in-depth market research and industry
12 intelligence to meet these needs.

13 Also, sharing of best practices, and I'm
14 going to be talking about our acquisition gateway
15 which is part of category management and how best
16 practices and everything can be shared from that
17 acquisition gateway. I'll talk about that toward the
18 end of the presentation here this morning. But we
19 want to share best practices, common templates, and
20 other information across the agencies so that we are
21 all getting the best that we can for the entire
22 federal government.

23 And then also, we want to -- category
24 management involves purchasing channels and contract
25 vehicles through better agency and industry

1 relationships. That's why we're here today; right?
2 To build these relationships and so that you can
3 better understand what GSA is trying to do.

4 There's a Category Management Leadership
5 Council, or CMLC. This was formerly known as the
6 Strategic Sourcing Leadership Council, or SSLC. And
7 as you see, strategic sourcing is one piece of
8 category management, but category management
9 encompasses much more than just strategic sourcing.
10 But the Category Management Leadership Council, or
11 CMLC, that I referred to is made up of the seven high-
12 spend agencies within the federal government and it's
13 led by OMB's Office of Federal Procurement Policy. I
14 said it backwards in San Francisco, so I'm looking at
15 Janet to make sure I said that right.

16 So you can see that this is looked at
17 government- wide, this is not just something GSA said
18 we want to push this out. GSA is a big player in this
19 and so we want you to understand.

20 Now that Category Management Leadership
21 Council did come up with some -- has identified six
22 goals for government-wide category management. I've
23 got those listed up there on the slide; I'm not going
24 to necessarily -- I can just kind of read through the
25 basics of them real quick: this is increased spend

1 under management; reduce contract duplication;
2 generate volume savings and administrative savings;
3 enhance data transparency; boost innovation; and
4 increase efficiency and effectiveness.

5 Now, what does this really mean for
6 industry? I can see one of those bullets is very hard
7 to read; I'm going to have to change the color on
8 that. We had some trouble in San Francisco but the
9 screen was really kind of funky. So I was hoping it
10 would show up better here. What does this really mean
11 for industry partners?

12 You know, we listen to industry. And we
13 found out industry said, "Government, you're way too
14 complex when you're going out to do a contract, which
15 makes it harder for us, it costs you more because we
16 have to bid higher, it doesn't allow us to be
17 innovative," and things like that. So what we're
18 hoping to gain, again from the industry perspective,
19 is: improved relationships, reduce the complexity of
20 what we're trying to do, improve performance, increase
21 innovation, and reduce costs. I mean, that's the name
22 of the game is reduce costs.

23 So I kind of talked a little bit and gave
24 you a background here on category management and what
25 that is about.

1 BMO, or Building, Maintenance and
2 Operations, and this is services, so do not think this
3 is products, this is actually the services that goes
4 in there, and I'm going to talk a little bit about
5 scope and what's included there.

6 How does this fit in? It is a strategic
7 sourcing effort and it does fit in with category
8 management. Where did BMO begin? We actually started
9 BMO about three years ago and we were working on a
10 menu of best practices. Those menu of best practices
11 are listed on the acquisition gateway, again, which
12 I'm going to talk about toward the end of this morning
13 so you'll kind of understand that, and where we got to
14 there. After we did that, then we started working on
15 the procurement or the acquisition piece of the BMO
16 solution.

17 Now, how did this come about? We began
18 with an interagency commodity team. We have over
19 eighteen different organizations or agencies that are
20 part of that. You can see I've got them listed up
21 there on the slide. So we have a whole host of people
22 that have been involved as far as defining and
23 developing the strategy of what we wanted this to look
24 like. GSA then was tasked with the implementation, or
25 going out and actually putting the contract in place.

1 So let's talk for a second about the
2 contract structure and what this is going to look
3 like. Now, what you're going to hear when Janet gets
4 up and talks about the draft RFPs, you're going to
5 hear a lot of things repeated, but we think that's a
6 good thing. The more times you hear it, hopefully it
7 better sinks in and you understand better. Janet will
8 also go into more depth and give you more information.

9 I'm just kind of giving you highlights so you can
10 hear and understand some of the things that's going to
11 be talked about. Also give you a chance that if you
12 have questions, you can jot those down; so that when
13 we get to the end you'll know some of the questions
14 that you may want to ask.

15 We talked about the contract structure.
16 Again, we want to keep it very comprehensive and
17 flexible. It is a government-wide solution, so it is
18 not just a GSA contract that we're talking about. I
19 talked about all those different agencies that were
20 part of our commodity team. This will be a
21 government-wide vehicle.

22 It is going to be an open-market multiple-
23 award and an IDIQ. What does that mean? For those of
24 you that are familiar with GSA schedules and
25 particularly Schedule 03FAC -- yes, we are familiar

1 with that, Teresa is over that particular schedule as
2 well, Janet and I have worked in that particular arena
3 as well -- this procurement is not; and I repeat, not
4 going against that schedule. This will be an open
5 market, so you may be a schedule holder; that's great,
6 but this is a totally separate procurement.

7 We do use commercial contract terms and
8 conditions in this contract, so please keep that in
9 mind. This is nothing government specific, it is
10 commercial. The primary NAICS code that we have
11 used -- now, Janet is going to talk a little bit more
12 about NAICS -- but the primary NAICS code that we use
13 is 561210. Now, there are others that will fall
14 under, but since we're trying to do a comprehensive
15 solution, we had to pick one NAICS code.

16 This contract, this will be a parent
17 contract and it will allow for various contract types
18 at the task order level to include firm fixed price,
19 time and materials, labor hours, and such. So, know
20 that there will be flexibility. We want to make this
21 broad enough to encompass what our customer agencies
22 are looking for.

23 It will be -- uh-oh. Okay. Thought I was
24 going to have to call the IT guy.

25 This will be a ten-year IDIQ parent

1 contract term. Now, what does that mean? It means it
2 will be a five-year base with one five-year option.
3 Janet will talk about that as well.

4 Now, at the task order level, it's totally
5 different. We actually had to seek a deviation to go
6 longer than five years, because the FAR calls for five
7 years. So at the parent contract level we did get
8 that deviation. For any task orders to go longer than
9 the five years as outlined in the FAR, a deviation
10 will have to be sought at that level.

11 Now I'm going to talk about --and this next
12 bullet will make a little more sense whenever I start
13 talking about the scope of services -- agencies will
14 be able to order a single service or a mix of multiple
15 services. Now, when I show you the chart, you're
16 going to see as contractors you will have certain
17 required services that you will have to offer to be
18 considered for an award. But agencies will have the
19 option to order just one service, or multiple
20 services. And the one service does not have to be a
21 required service, it can be any service that's on the
22 list.

23 Sustainable product requirements, we do
24 include those at the contract level, however, agencies
25 -- this is kind of a government-wide thing, so if

1 agencies have something specific to their agency, they
2 will include it at the task order level. So just know
3 that you will have some information at the parent
4 contract level but it could even get defined further
5 once a task order is issued.

6 Unilateral changes waiver. Typically this
7 is not done under commercial contracts, but we did
8 seek a waiver so that unilateral changes can be done.

9 And Janet will talk a little bit more about that as
10 well.

11 We say we have both large and small
12 business participation. As you know, we have issued
13 draft RFPS, and that is with an "S" so that are two
14 draft RFPS that have been issued. One is
15 unrestricted, and one is a total small business set-
16 aside. Now, as we do our market research, that could
17 change. It may be determined that we only need to do
18 a small business set-aside for a particular zone.
19 Again, that will come as we continue with our market
20 research.

21 Okay. Let's talk for a second about small
22 business strategies, since I was kind of leading there
23 anyway. To help with small businesses we have
24 determined to take a zonal approach; and here in
25 another slide or two I have a map that's going to show

1 you that zonal approach, and the zones that we are
2 looking at right now. We wanted to kind of keep the
3 areas small so that we can encourage and get that
4 small business participation. For those other than
5 small businesses, you will be required to do a
6 subcontracting plan. Obviously small businesses
7 won't, but particularly under the unrestricted.

8 Now, set-asides can be done at the task
9 order level under the unrestricted, and then even
10 within the small business we have other socioeconomic
11 groups that a certain set-aside could be done for
12 those other socioeconomic groups. Such as HUB zones,
13 such as woman-owned, veteran-owned, small-, and so
14 forth, disabled veteran-owned.

15 Let's talk scope. I promised we were going
16 to talk about that, and for those in the back and at
17 the side, this chart may be a little hard to read, but
18 hopefully I can kind of talk through it and you will
19 better understand. Within the scope of BMO, we have
20 defined two service categories: one, operations and
21 maintenance; the second is facility support services.

22 Under each of these categories we have a list of
23 required services and then a list of optional
24 services. For example, under operations and
25 maintenance we have listed HVAC maintenance, plumbing

1 and pipefitting, elevator maintenance and electrical
2 maintenance. Those four services are required on the
3 unrestricted.

4 On the small business set-aside we will
5 remove elevator maintenance so the required services
6 would be HVAC maintenance, plumbing and pipe-fitting,
7 and electrical maintenance.

8 So you must offer those services to be
9 considered for an award. If you do not offer those,
10 you may look at partnering with somebody to actually
11 provide those services. That's why I asked you at the
12 beginning if we can share your email address, and I'm
13 going to make that announcement again. Hopefully you
14 were asked at the table. If you were not, we will be
15 sharing email and company information with other
16 attendees; not only at this event but all five events
17 that we're doing. If you do not want that shared,
18 please let us know so that we can mark that down and
19 not share that information.

20 Again, this is for networking purposes.
21 When we, we'll talk about our Zone 1. When we did it
22 there we had a lot of requests because they wanted to
23 partner with other companies that were also attending.

24 Now you see we have a whole list of
25 optional services. These are not required but you do

1 get evaluation credit if you offer optional services.

2 And Janet will talk a little bit more about that as
3 well. So hopefully that makes sense.

4 Now, again, I stated earlier that customers
5 can order a single service or a mix of services. So
6 for instance, a customer could come in and just order
7 fire alarm systems maintenance, even though that's
8 under optional.

9 Okay. I talked about the zonal approach
10 and this is a map of what that looks like. You see
11 the green area. That is our Zone 1. We are in the
12 process right now of awarding Zone 1. We've got three
13 contracting officers back in the office in Kansas City
14 right now diligently working to get those awards done.

15 Some of you in the audience may have made or
16 submitted an offer for that. We can't really say much
17 other than they're being evaluated right now. And
18 then you will be advised, hopefully in the next two or
19 three weeks or so, as far as whether you got an award
20 on that.

21 Now, what is included in Zone 1? It
22 revolved around Washington, D.C. We also included
23 Virginia, Maryland, Pennsylvania, Delaware, New York,
24 New Jersey and West Virginia. Now, you can see that
25 we have an additional five zones. Zone 3 is right

1 here where we are right now; to include Florida,
2 Georgia, North Carolina and South Carolina. You heard
3 Teresa say we were in San Francisco earlier this week,
4 so that's way out in Zone 5 which covers California
5 and Nevada. We are going to Boston next week, so Zone
6 2; Massachusetts, Connecticut, New Hampshire, Vermont,
7 Maine and Rhode Island. Then we will be going on to
8 Fort Worth next week which is Zone 4 and includes
9 Texas and Oklahoma. And then we get to go home to
10 Kansas City -- yay -- which includes Missouri,
11 Illinois, Iowa, Nebraska and Kansas.

12 Now, each of these zones work
13 independently. There are separate solicitations going
14 out for each of these zones. You can pick which zone,
15 or zones, that you want to submit an offer for. Even
16 if you've already submitted one for Zone 1, it's
17 totally independent, you can actually come in and
18 submit offers under these additional zones.

19 Okay. Hopefully that kind of gave you a
20 broad overview of what BMO is, what category
21 management is. And I think we're doing good on time
22 here, so I'm going to introduce Janet Schweer. Janet
23 is our supervisor over the whole BMO team. She's a
24 contracting officer, and she's going to actually go
25 through the acquisition solution and talk about the

1 draft RFPs. I think she's also a little bit -- maybe,
2 I won't say in the middle but maybe a little bit
3 toward the end we're going to take a quick break so
4 that we can get up and stretch and all of that as
5 well. So, Janet.

6 MS. SCHWEER: Thanks, Mary. I'll try and
7 reach the microphone before I do anything.

8 Good morning. I will do my best to try and
9 remember to say a full acronym before I use the
10 acronym. As Mary said, we're going to wait and take
11 questions at the end. But if anybody wants to give me
12 one of these, like, "Oh, I don't know what you just
13 said," I'll go back and try and repeat that, so I will
14 do my best to do that.

15 I know the regional administrator asked
16 where everybody was from. Can I get a show of hands,
17 who has a GSA multiple-awards schedule contract in
18 here? Quite a few; okay.

19 Let me go ahead and get started here. So
20 our acquisition solution; as Mary mentioned, we have
21 two requests for proposals, or RFPs, out right now.
22 We posted the unrestricted on January 8 and the small
23 business set-aside on January 11.

24 Now, Mary just mentioned with the map that
25 we will have separate solicitations for each zone.

1 Right now we've just put out one set of drafts. And
2 the reason for that is, the bones of it are going to
3 be the same for most of it; and because we don't know
4 yet what will change for each zone. That's where you
5 all come in, to give us that feedback. We need to
6 know if -- what are we in, Zone 3? Is that what you
7 just said -- you know, is something different here
8 that we need to change. So the finals may look a
9 little bit different.

10 The closing date for those is February 5.
11 And the closing date is just for questions. Even
12 though you can ask questions here today, we will still
13 ask and if you want you can send us questions in
14 writing that we will then post, as Mary mentioned, to
15 our Interact site.

16 Along with the draft requests for proposals
17 is a questionnaire that we would love for everybody to
18 fill out and get back to us. It's going to ask you
19 about what services your company offers and where you
20 can perform them, like state-wise, which states. This
21 is really, really, really important to our market
22 research; helps us know if we kind of have our zones
23 correct, do we need to alter our zones because we
24 don't have a lot of coverage in one state or another.
25 So that's really important, please submit that.

1 That's not due until February 19. And then we're
2 projecting to issue our final requests for proposals
3 in late May-June of 2016.

4 So, now we're going to get into going
5 through section by section of the draft requests for
6 proposals. The small business and the unrestricted,
7 like I said, are essentially the same. I'll be
8 pointing out the differences for the small business
9 one along the way.

10 Section A, Standard Form 33, pretty self-
11 explanatory. I will just put in a plug here; when we
12 do the final and you're actually submitting your
13 proposal, pay attention to the instructions for this
14 form. Sometimes people miss a box here and there. It
15 really helps us out if you read the instructions and
16 fill it out correctly.

17 Okay; Section B. As Mary mentioned, this
18 is a government-wide multiple-award, indefinite
19 delivery, indefinite quantity contract type. So both
20 the unrestricted and the small business set-aside are
21 the same; we will be making multiple awards under
22 each. It does allow for various contracts types at
23 the task order level, fixed price, all types, time and
24 materials, and labor hour. What you don't see up here
25 is cost reimbursement; and that's because it is, we

1 are using commercial contract terms, so we cannot do
2 cost reimbursement task order under this.

3 There is a minimum guarantee. A few of you
4 have a schedule, but for those of you who don't know,
5 it's common under an IDIQ contract to have a minimum
6 guarantee for the contractors. That minimum guarantee
7 for these contracts is \$2,500. There is a maximum
8 ceiling as well with an IDIQ contract. We don't know
9 what they will be for each zone yet because it depends
10 on the spend in each of those zones. For Zone 1 the
11 ceiling is \$15 billion. It would be awesome if we got
12 to \$15 billion; I'm not sure if we will, but so just
13 an example there. But that will be in the final. I
14 don't know that that's really going to impact your
15 proposal.

16 Also in Section B, we talk about the labor
17 categories and standard occupational classifications.
18 We do something a little bit different on these
19 solicitations than some of you may be used to. We
20 have standardized the labor categories. And what we
21 mean by standardized is we're saying what we determine
22 an HVAC mechanic is, has X number of years experience,
23 has whatever education; and that's what we're asking
24 everybody to use when they're submitting their
25 proposals. It doesn't mean you have to submit all

1 those labor categories, you would still only submit
2 what was pertinent to your company.

3 But we've standardized those because, quite
4 honestly, it makes it easier for us when we're doing
5 our price analysis to compare apples to apples. It's
6 really hard if one company uses a project manager
7 three and that's their highest paid one, and another
8 company project manager three means they're the lowest
9 level one; really hard for us to compare. So we've
10 standardized those. We did that based on the Office
11 of Management and Budget's standard occupational
12 classification.

13 If any of you have actually looked at the
14 package, the draft RFP package, we have our pricing
15 template up there and we have the crosswalk in there
16 of all the labor categories and classification. What
17 you'll notice is that for a lot of them there's
18 multiple levels like I just said about the project
19 manager. You know, there might be four levels of HVAC
20 mechanics in there. So we ask, this says, shall
21 become proficient in the use of the system. It will
22 definitely help if you take a read through that, send
23 us questions if you have it on there. That was kind
24 of a labor-intensive process for us to go through
25 that. If you don't see some labor categories up there

1 that you use all the time when you're performing this
2 work; let us know, and we'll see if we need to add
3 them.

4 What I didn't mention, this applies to both
5 Service Contract Act or service contract labor
6 standards, labor categories as well as professional
7 categories. We have standardized the descriptions and
8 requirements for professional labor categories as
9 well.

10 Okay. Section C. This is mostly our
11 statement of work, performance-based statement of
12 work. So to get into the background a little bit that
13 Mary already mentioned. It is a comprehensive
14 solution, crossing multiple service categories that
15 can be sought as a single or multiple service; so
16 you're going to see it's pretty broad. As Mary
17 mentioned, it's government-wide, so we had to consider
18 kind of the needs of -- maybe not all eighteen
19 different agencies that are on the commodity team but
20 pretty close. We want everybody to be able to use
21 this, so there may be specific requirements of one
22 agency that you work with a lot that you don't see in
23 there. Those are the kind of thing that they can add
24 at the task order level.

25 The period of performance, as Mary

1 mentioned, is ten years; so there's one five-year
2 base, one five-year option. There are requirements in
3 order to have your option extended, and we'll get to
4 that in a few minutes. The scope, as we've mentioned,
5 covers the most commonly-used services. We worked
6 really hard with industry and with our commodity team
7 to see, what services are most commonly purchased
8 together in your contracts. That's where we came up
9 with our required services.

10 The agencies told us these are what we buy
11 most often together, this is what we want all the
12 contractors to be able to do; it gives us a good core
13 base for us going out and getting those requirements
14 filled. If we know that everybody on the contract can
15 do those required services.

16 The geographic coverage, Mary covered, so
17 there's the states again and the zones. And I think
18 Mary mentioned this, she may not have, but again,
19 that's where we want feedback from you all in the
20 questionnaire and in the responses to the draft, so
21 these zones may change depending on if we get a whole
22 lot of market research in one area that says nobody
23 delivers to Vermont, do we need coverage in Vermont?
24 Maybe not. So that may change in the finals, so
25 that's where we want everybody's feedback.

1 As Mary mentioned, we do have two separate
2 service groups: we have operations and maintenance or
3 O&M, and we have facility support services. Again, we
4 developed these based on feedback from our commodity
5 team and from industry that a lot of companies kind of
6 had one area or the other, some, of course, do
7 everything. But facility support services sometimes
8 report just separately under janitorial/landscaping
9 versus all together with the O&M, so they are
10 separate. And as Mary mentioned, each one has
11 services that are required and some that are optional.

12 So here's the chart again. I think you're
13 going to see it -- maybe this is the last time. But
14 we do have the required services for O&M, which Mary
15 talked about; and then for facility support services,
16 we have janitorial and landscaping/grounds
17 maintenance. As I mentioned, I know some companies do
18 all of this. And if you notice, on the operations and
19 maintenance side down towards the bottom one of the
20 optional services is facility support services.

21 So if your company does all of that up
22 there, then you would submit under the operations and
23 maintenance side with the facility support services as
24 optional. However, you do have to be able to offer the
25 janitorial and landscaping to qualify for that. So

1 you still have to meet the same required services as
2 the facility support even if you're offering it as
3 optional; but if your company does all of that, you
4 would come in under the operations and maintenance
5 side.

6 And as Mary mentioned, the elevator
7 maintenance has an asterisk beside it because for the
8 small business set-aside that is an optional service.

9 All right. We mentioned earlier, Mary
10 mentioned that this is not a multiple award schedule
11 contract vehicle. We hope it's a little bit more
12 flexible in some areas, and one of those areas is
13 other direct costs. Other direct costs are those
14 relating to incidental services and/or supplies that
15 do not fall within the scope of any other service
16 category listed. So you may have a contract with a
17 firm fixed price monthly amount to maintain a
18 building; but something comes up, a chiller breaks, or
19 it has to be replaced. Obviously you haven't worked
20 that into your normal presently maintenance monthly
21 price, so that would be, dependent on the dollar
22 value, could be done as an other direct cost.

23 What we found in our market research for
24 Zone 1 is that most agencies have different thresholds
25 for what they consider ODCs. It was all over the

1 place: some of them were really high, like \$25,000,
2 some of them might have been \$2,000. So, rather than
3 us try and dictate for a government-wide vehicle what
4 that should be, each agency at the task order level
5 will still continue to use their same ODCs threshold.

6 So you'll have to keep that in mind when you're
7 looking at requests for proposals at a task order
8 level of what that agencies other direct costs
9 threshold is.

10 We've talked about what's in scope; and of
11 course, we should talk about what's out of scope. The
12 following services are considered not within scope for
13 BMO. This is based on feedback from industry, this is
14 based on a lot of feedback from our customers. If you
15 have strong objections, you know, and you say, "well,
16 I do this all the time and we always have to do
17 telecommunications systems, : let us know that; we'll
18 take a look at it. This is based, again, on what our
19 customers were telling us that's normally not within
20 scope.

21 I can tell you we are probably not going to
22 change our minds on the architect and engineering
23 services; because those have very, very special
24 requirements and regulations, and the same with the
25 asbestos removal. Our market research and customers

1 have told us that they almost always do those as
2 separate contracts; because, of course, those have
3 high requirements and regulations.

4 Section D is packing and marking, not
5 terribly exciting for a services contract, so all we
6 have there is to conform to commercial standards. If
7 agencies have specific requirements, they can add
8 those at the task order level. You're probably
9 noticing a trend that we say they can add this at the
10 task order level a lot. Again, that goes back to: we
11 want to make this flexible. It's an overarching
12 contract but agencies need to be able to add their
13 specific requirements at the task order level to make
14 sure it can meet their needs.

15 Section E is inspection and acceptance. We
16 have the Federal Acquisition Regulation clause in
17 there, and again; additional language could be added
18 at the task order level, if there were specific
19 requirements for inspection that an ordering contract
20 officer may have. So those are kind of boring so I'll
21 skip right through those.

22 Deliveries or performance. I think Mary
23 mentioned this, but we're going to kind of harp on it
24 a little bit here. So these are our proposed zones.
25 In order to qualify to receive an award on our parent

1 contract, a company has to be able to deliver to all
2 the states in the zone they are offering for. So
3 we're in Zone 3, if you were going to submit an offer;
4 you would have to show us that you can deliver these
5 services to Florida, Georgia, North Carolina and South
6 Carolina. Unfortunately, we don't want necessarily a
7 lot of offers that just can deliver to one state.

8 It makes it really hard on our customers
9 when they're going out trying to find a solution to
10 know, from a big list of companies, who delivers to
11 one place. They want to know that everybody can
12 deliver to all the states in that zone. It doesn't
13 mean you have to have done it before. If you've
14 delivered to three of those states, but maybe you've
15 never gone down into Florida ;but you have the
16 resources to open an office there or partner with a
17 subcontractor there, something, you have a way to meet
18 the requirements, you'll have to explain that to us in
19 your proposal. Like Mary talked about earlier,
20 partnering, networking, you can hopefully get some
21 contacts here. But that is a requirement.

22 The period of performance, we've talked
23 about a couple of times, will be from the notice to
24 proceed through five years with one five-year option
25 that may exceed the cumulative term of the contract to

1 ten years, and then a six-month extension if option to
2 extend the services is required.

3 Section G is contract administration. Not
4 a lot of impact for you all as industry but I'm going
5 to go through some of this anyway. It outlines the
6 roles and responsibilities. Because this is kind of a
7 government-wide contract, we will have the contracting
8 officers in our office who are the administrative
9 contracting officers, and then you have what this
10 says, OCO, that would be the ordering contracting
11 officer.

12 So that's the contracting officer at the
13 agency or task order level that's actually purchasing
14 the services from you. And then the COR is the
15 contracting officer's representative; which, of
16 course, is usually the person in the building that you
17 deal with on a day-to-day basis. So it outlines the
18 roles for that.

19 It also talks about the contract access
20 fee. For those of you familiar with GSA schedules,
21 there is an industrial funding fee of .75 percent that
22 you've included in your prices. This is a little bit
23 different. We have a contract access fee of 2
24 percent, and you do not include this in your prices,
25 this would be a separate line item on your invoice to

1 your customer. So your customer is paying it, and you
2 have it as a separate line item so they can clearly
3 see what that is.

4 It also talks about the reporting modules.
5 Mary mentioned briefly, when she was going over
6 category management, about data and transparency. The
7 data that we get from strategic sourcing vehicles is
8 very, very valuable to us and to our customer
9 agencies. There are some initiatives in place right
10 now, especially for products, to get prices paid
11 information. That's really, really difficult for the
12 government in terms of services. Us, as the GSA,
13 really have no idea what DoD is paying for any
14 services.

15 So we're going to be asking for a lot of
16 data from you as industry about the orders you get
17 through BMO. We're going to ask the task order type,
18 modification data, the prices that you're offering, we
19 may ask about the size of the buildings. This is a
20 short list; there's a much longer list in the draft.
21 We're going to ask about environmentally sustainable
22 products data; CAF payment data, which is the contract
23 access fee; closeout data, if you're a large business;
24 subcontracting plan data, which you ought to be used
25 to if you're a large business because you already have

1 to report that. So it explains all of that in this
2 section, and then about closeouts and how we will be
3 determining the option which, again, I'm going to talk
4 about in a little bit.

5 Again, I want to emphasize the data;
6 because we do have customers that say that the data is
7 one of the most important parts of participating in
8 this process for them. Because they don't have the
9 means at their agency to collect that, so they're
10 really relying on GSA to help them.

11 Okay. Section H, special contract
12 requirements. Again, this is back on the ordering
13 procedures, doesn't impact a lot of you now in the
14 draft process, but if you see anything in there that
15 doesn't make sense, please let us know, you know. All
16 task orders under the building maintenance and
17 operation vehicles must be solicited and awarded by an
18 ordering contracting officer with a delegation of
19 procurement authority. So what that means is, we will
20 be going out and training contracting officers at
21 other agencies on how to use our vehicle. Once
22 they've gone through this training, they will get a
23 certificate of some kind that says "you have a
24 delegation of authority to use this vehicle."

25 The onus really isn't on you to check to

1 make sure they have that. We will kind of ask for
2 that in the data part that I just mentioned. You
3 know, we'll want to know who the contracting officer
4 was, we'll have a list we can check that against. But
5 they do have to receive that training; this is common
6 with some other government-wide vehicles.

7 We want to make sure people are using it
8 correctly. It's to help protect them, reduce risk for
9 them, to make sure that they're procuring services
10 that are within the scope of this vehicle, and to help
11 protect us to make sure they're procuring services
12 that are within the scope of this vehicle, and that
13 we're not building weapons systems or anything like
14 that that obviously doesn't fall in here.

15 So the second bullet: Be within the scope
16 of Section C and all other terms and conditions of the
17 BMO contract. We have parent terms and conditions in
18 this contract. At the task order level, an ordering
19 contracting officer can always add agency-specific
20 requirements, O&M-specific requirements; they can add
21 as much as they want as long as it doesn't contradict
22 anything in the parent contract. The task orders
23 should identify the labor categories and service
24 occupational codes that are being used. It should be
25 solicited and awarded under the proper NAICS code, and

1 we're going to talk about that more in just a second.

2 NAICS, for anybody who doesn't know, is

3 North American Industrial Classification System.

4 That's maintained, I believe, by the Census Bureau --

5 I may be wrong, but that's what I think. And those

6 contain the size standards for determining if you're a

7 large or a small business, and again, we'll talk about

8 that in a second.

9 Identify the proper product service code.

10 We have an attachment with the draft on that. Comply

11 with the ordering procedures in FAR Subpart 16.505

12 ordering. And again, the next bullet, comply with

13 fair opportunity ordering procedures.

14 So, the ordering procedures must comply

15 with fair opportunity. What does fair opportunity

16 mean? So everybody is going to be offering the same

17 required services, but we may have fifteen companies

18 that offer fire alarm maintenance services. So, if we

19 had a total of forty awards but only fifteen companies

20 offered fire alarm services and I'm a customer and I

21 want fire alarm services; I only have to go to the

22 companies that are offering the fire alarm services

23 and give them a chance to bid, because nobody else has

24 that as part of their contract.

25 So I have to send it to all fifteen to give

1 them fair opportunity. So that's the way this works.

2 It's not just three, doesn't depend on the dollar
3 amount, it has to go out to everybody that offers
4 those services.

5 Okay; the NAICS codes, let's go further
6 down. We have two separate services groups, as we've
7 mentioned, we have operations and maintenance and
8 facility support services. We are using one NAICS
9 code 561210 to solicit these at the parent level. The
10 size standard for that is \$38.5 million. That means
11 if your company has an average annual revenue over the
12 last three years of under that, you would be
13 considered a small business for the purposes of our
14 solicitations. That's average annual revenue over
15 three years.

16 At the task order level, the ordering
17 contracting officer may use a different NAICS code.
18 If they're only ordering HVAC services, they may use
19 that NAICS code. They should be using the most
20 appropriate NAICS code at the task order level for
21 what they're purchasing. 561210, as Mary mentioned,
22 is very broad; it covers all facility support
23 services, which is why that's what we're using at the
24 solicitation level.

25 GSA BMO web page. This will be a website

1 that we will have as part of the GSA.gov web portal.
2 They will not let us put it up until we've awarded
3 contracts; so as soon as we have Zone 1 awarded, we
4 will have it up there. It will be, as you can see on
5 the slide, for the purposes of informing our
6 customers, stakeholders and the general public of the
7 attributes and procedures for BMO. So it will have an
8 ordering guide, an extensive ordering guide up there
9 that tells contracting officers how to use it. It
10 will also tell them that they have to have the
11 delegation of procurement authority first to use it.
12 It will have information about our training on there
13 as well.

14 We will have templates that they can use,
15 we will have sample statements of work they can look
16 at. It will have a link to -- what Mary is going to
17 talk about a little bit later -- our acquisition
18 gateway.

19 It will also have -- and we don't have the
20 slide in here -- a matrix of the awardees and the
21 services they offer. So as I mentioned, I think in
22 the last slide; obviously everybody who is awarded
23 will have whatever required services they offered, but
24 companies may have optional services, and if I'm a
25 customer I want to see who is offering what optional

1 services so I can make sure and give them fair
2 opportunity. So there will be a matrix in there that
3 shows what vendors we've awarded, what services they
4 were qualified for and we awarded them for.

5 The minimum task order awards. This is
6 where I've been kind of alluding to with the options.

7 This is what, in order to maintain your contract past
8 the base period, you would have to attain. So for the
9 unrestricted solicitation, which would be other than
10 small businesses or small businesses that qualified
11 for the unrestricted; you have to attain a minimum of
12 five task orders in your five-year base period, or if
13 it's less than five task orders, it needs to be at
14 least \$1.25 million. So we recognize that not
15 everybody is going to get ten task orders; but you may
16 get one task order that's really high dollar value and
17 maybe that's all your company can do, that's fine, but
18 it needs to meet this minimum sales amount.

19 For the small business, this is only three
20 task orders; or a total task order estimated value of
21 \$325,000. Now, anything less than that would be at
22 the contracting officer's discretion at our level if
23 you're going to continue to contract or not. And this
24 would be the same for all of the zones going forward.

25 So unlike the multiple award schedule

1 solicitations which are standing solicitations,
2 they're always open, they're always awarding you
3 contracts; our solicitation is not like that. We have
4 an open date and we have a close date when making
5 awards. However, we have built into the contracts, or
6 the solicitations, provisions for adding additional
7 contractors if we need to. There could be several
8 situations where this might happen.

9 The first one that you see on your screen
10 is vertical contract on-ramping. Small businesses can
11 grow; right. They can become large businesses. What
12 happens then, are they still in the small business
13 set-aside? No. They would get to the end of the base
14 period, for example, if they had become large during
15 that time; then they would be taken off the small
16 business set-aside, but they would be given the
17 opportunity to submit a proposal to go in the
18 unrestricted at that point. And again, they would
19 have to submit a proposal, it's not automatic; they
20 would have to qualify and meet the same requirements
21 for that.

22 MALE VOICE: So then, if you're a small
23 business for the IDIQ, you're not grandfathered in for
24 that term?

25 MS. SCHWEER: So the question was: Does

1 that mean if you are a small business and you get the
2 IDIQ, you're not grandfathered for the term? Only for
3 the base period. We always revisit that at the end of
4 the base period before the option period; because we
5 have to look at the size again then.

6 Okay, the open-season on-ramping. We may
7 decide that the demand is so high for the use of our
8 vehicle that we just need to make some more awards in
9 general. So in that case we would do an open season
10 where we would open up one or both of the
11 solicitations to new companies to submit proposals,
12 and just to add more companies.

13 And the third would be focused on-ramping,
14 or sub-pool creation. In our initial set of awards
15 maybe we don't get any companies that do pest control
16 services, so maybe we would need to do a focused on-
17 ramping to get more companies that do pest control.
18 We may decide, we have a customer who comes to us and
19 says I need fifty service-disabled veteran-owned small
20 businesses on this, and so we may go out for a
21 specific socioeconomic category and try and on-ramp
22 some more companies. We would follow all of the
23 requirements for publicizing these notices. It would
24 be on FedBizOpps; if you follow that, you would see
25 it.

1 Dormant status. This is kind of an
2 innovative concept that was -- I don't know if it was
3 originally developed but we're kind of following the
4 lead of some of our colleagues in a different program
5 called OASIS that has this dormant status. And that
6 means if you're not performing well on this contract,
7 we're getting complaints, there's other problems,
8 you're not in compliance with the data reporting, we
9 may put you in what's called dormant status.

10 That means you keep performing on the
11 orders you have; but we take you off the list, you
12 can't get new orders until you get this corrected. We
13 may put you on kind of a get-well plan, you know, how
14 are you going to fix this. Show us how you're going
15 to get in compliance with these requirements; if
16 you've had quality issues, how are you going to fix
17 those.

18 That's never our goal but unfortunately,
19 every now and then you get some companies that have
20 turnover, have hard times, something happens, you
21 never know; and hopefully we could get people back off
22 the dormant status and get that corrected. However,
23 if we don't, there is off-ramping. If we have
24 companies who do not comply with the terms and
25 conditions of the contract, are not meeting the

1 requirements of our data reporting; we, unfortunately,
2 could off-ramp them from the vehicle.

3 Okay, Section I is extremely fun, it has
4 all the contract clauses which everyone has read and
5 has committed to memory. I'm not going to go through
6 them because they are in the draft for your reading
7 pleasure. What I am going to point out, that Mary
8 mentioned earlier, is our class waiver to paragraph
9 (c) of FAR 52.212-4. This allows government agencies
10 using this contract to make unilateral changes in
11 situations impacting safety or working conditions or
12 when it is in the government's best interest.

13 The unilateral changes clause is frequently
14 used in non-commercial contracts. As we've mentioned,
15 this is a commercial contract, so we did seek a waiver
16 and were granted a waiver to use the unilateral
17 changes clause in this contract.

18 Section J is all the attachments, and they
19 are quite a few. I'm going to go over some highlights
20 of it. The first one in bold is, of course, our
21 questionnaire that I've talked about multiple times.
22 Because it's very, very important, we need you all to
23 look at that and send it back in to us. So that's
24 part of the attachments for the draft. We're going to
25 skip the Standard Form 33 and go to the proposal

1 checklist. This is something that you will use if
2 you're preparing your final, or your actual offer,
3 after we issue the final documents. It will help you
4 make sure that you've gotten everything because there
5 will be a lot of information that you'll have to
6 submit.

7 The self-scoring worksheet. This may be
8 something a lot of you haven't seen before. The self-
9 scoring worksheet is to help you go through your
10 proposal and figure out what score you think you have
11 earned, based on the proposal that you've submitted.
12 We're going to talk after the break about the
13 evaluation factors, it will make a little bit more
14 sense then, but we do ask that you complete the self-
15 scoring worksheet when you're submitting your offer,
16 and then we will go back through and kind of compare
17 what you say you've given us with what we actually
18 see.

19 The standardized labor categories and
20 definitions we've talked about already. That's in the
21 attachment to review. And then up on the second
22 column, the price template; that's an Excel
23 spreadsheet that is attached. We recommend that you
24 take a look at that. We do want your feedback on
25 that. What you see there is what we used for Zone 1,

1 so if anyone has comments, questions about that,
2 please send that in to us.

3 The wage determinations are posted there.
4 We'll talk about that a little bit, too, after the
5 break.

6 And then the next one that's in bold is the
7 relevant project experience template. Again, this is
8 one that we really, really want your feedback on, and
9 we will talk about it a little bit more when we get to
10 the evaluation factors. We tried to do this the best
11 we could. It is a fairly detailed form, because we do
12 want a lot of information. If you see ways to
13 streamline that, please let us know.

14 I think in San Francisco we had a comment
15 saying it would be nice if there was like a wizard you
16 could complete. And yeah, that would be great if we
17 had the electronics system to receive that and do
18 that; but I'm not sure that we do. So we'll do our
19 best to try and make it a little bit more streamlined,
20 but please send us your feedback on that.

21 The project zone coverage template we will
22 talk about a little bit later as well. Quality
23 assurance surveillance plan, standard. And then
24 again, the subcontracting plan template, which would
25 only apply to unrestricted; and that would be only for

1 other than small businesses, so large businesses on
2 the unrestricted.

3 Section K, representations and
4 certifications. If you have done business with the
5 government before, or even if you haven't, you
6 hopefully are registered in the System for Award
7 Management, or SAM. If you are in SAM, then you
8 probably completed your representations and
9 certifications in there. We will still be asking for
10 it in the final. So you can take a look at the
11 specific clauses that are in there, and what we will
12 be asking for.

13 I'm going to go one more and we'll take a
14 break. Section L has instructions, conditions and
15 notices to offerors or respondents. And it contains
16 all of the provisions from the FAR, the Federal
17 Acquisition Regulation; and the GSAAR, which is the
18 GSA Acquisition Regulation. For both the draft and
19 the final, if you have questions during our question
20 period, we ask that you submit them in the Microsoft
21 Excel file.

22 As Teresa mentioned, we received roughly
23 400 questions to the final solicitations that we
24 posted for Zone 1. It really helps us if we get them
25 in the same format, so we can put them all in a

1 spreadsheet and answer them and post them all. If we
2 get one by email that's just typed in email, we can do
3 it; but imagine getting 400 of those, really
4 challenging for us. Please submit them in the format
5 that we ask for, reference a specific section number,
6 a page number, and what your question or your comment
7 is.

8 This has zone on it, and that's really
9 going to be more for the final documents, because we
10 just posted one set right now for the draft. What
11 we're projecting right now on the final documents is
12 that we will be asking, again, for both hard copies
13 and electronic copies for all the sections. We
14 project probably asking for four or five of these this
15 time; we asked for more in Zone 1; and I'm not sure we
16 have the space to store all of the copies of that, but
17 we're going to make sure we find it. But I don't know
18 that we need as many, so we're going to probably ask
19 for four or five hard copies and four or five
20 electronic copies. Okay.

21 And I am going to stop right there, Mary.

22 MS. SNODDERLY: We are going to take about
23 a 15-minute break, and then we're going to come back
24 because there's still a lot more information, very
25 important information that Janet needs to give; but

1 I'm sure everybody is getting a little restless. One
2 thing I wanted to give you again before the break, if
3 you want to sign on to the guest wi-fi you need a
4 password. All right, everybody pull out pens and
5 pencils and paper? It might be a little hard to read,
6 but as Janet is getting it up there, let me read
7 through it. It's L@serJet.

8 Okay. With that said, I've got about six
9 minutes after ten. Let's take about a 15-minute break
10 and be back about twenty after. Thank you.

11 (Whereupon, a brief recess was taken.)

12 MS. SNODDERLY: We're going to get started
13 and Janet is going to finish up talking about the
14 draft RFPs, and then we'll give you some next steps,
15 and then we'll be opening it up to questions and
16 answers. Again, I would like to ask -- I know I've
17 made this announcement several times but I want to
18 keep making the announcements -- we will be sharing
19 the attendee list, unless you do not want your contact
20 information given out; if you do not, please make sure
21 you let us know and we will not share that.

22 Otherwise, we will share from all five events the
23 attendee lists and the contact information of the
24 companies that have attended. So, Janet.

25 MS. SCHWEER: Okay. Hopefully, if you

1 needed coffee you got some coffee because we're really
2 going to get into some fun stuff right now.

3 Okay, evaluation factors is Section M. So
4 this is where it gets a little confusing, so I
5 apologize if it doesn't make sense; but I'm going to
6 say again, hold your questions till the end, we will
7 have plenty of time for questions. So I'm going to go
8 ahead and get into it.

9 We are doing award based on best value on
10 the best-value continuum. It is going to be highest
11 technically rated offerors with a fair and reasonable
12 price. So that doesn't mean lowest price technically
13 acceptable, it doesn't mean just overall best value or
14 price and technical are equal, it means highest
15 technically rated with a fair and reasonable price.

16 As you can see at the third bullet, that
17 means that all evaluation factors, other than cost and
18 price, when combined are significantly more important
19 than cost and price. So we want the best of the best
20 technical-wise, we want companies that are highly
21 experienced, that -- and we'll talk about this in a
22 minute -- may have innovative approaches to saving the
23 government money, but can show us that they know what
24 they're doing and will be the best choice for our
25 customers.

1 The government intends to award contracts
2 without discussions. This means that your initial
3 proposal should be your best offer, because you cannot
4 guarantee that we're going to come back and want to
5 negotiate with you. We may conduct clarifications.
6 Clarifications are not the same as negotiations. It
7 may just be that we see that you forgot to check a box
8 somewhere and we may go back to you and ask you about
9 that. However, we do reserve the right to conduct
10 discussions if it's determined necessary or in our
11 best interest.

12 The evaluation process, screening and
13 evaluation process. We will be using a two-step
14 screening process for all offers we receive. The
15 first step will be our team will verify that all of
16 the support documents exist. In other words, we're
17 going to go through it, kind of like you do with your
18 proposal checklist, and make sure all the documents
19 are there. In that first step we don't necessarily
20 review them to see what you did technical-wise, but
21 we're going to make sure that you submitted the
22 projects.

23 We will compare it to your self-scoring
24 worksheet that I mentioned earlier, so this is where
25 we're going to back and say: well, they said they

1 submitted this document; I can't find this document in
2 their proposal. And then, as you can see, any
3 discrepancies there will be treated as clarifications.

4 The evaluation team will assign a
5 preliminary score in accordance with the scoring
6 table, and again, that's based on the self-scoring
7 worksheet. Basically, we use the same kind of form
8 and we go through it and give it a score as well.

9 So now we're going to go through the four
10 different sections of the actual proposal. Section 1
11 is general information. The subsections include your
12 Standard Form 33 -- we talked about that a little bit.

13 I will tell you on that; make sure, again, you read
14 the instructions, you fill you the boxes. One of them
15 asks for payment terms, prompt payment discounts. A
16 lot of times that gets overlooked. Make sure you're
17 looking carefully at everything you need to complete.

18 The proposal checklist. This is what you
19 use when you're making sure you've, when you're
20 putting all the copies together, make sure you submit
21 everything we asked for. It is there to help you.
22 Please use it.

23 The self-scoring worksheet; again, that's
24 there to help you make sure you've submitted
25 everything. It's going to explain, or I guess help you

1 figure out the extra credit that you may get for
2 certain projects that we're going to talk about in a
3 minute; and give you an idea of what you think your
4 score will be, and then we will use that when we're
5 doing our evaluations.

6 The next two are kind of related to the
7 partnering that Mary talked about and that I've talked
8 about, the meaningful relationship commitment letters
9 and the existing joint ventures or partnerships. So,
10 if you can't do all the required services yourself, or
11 maybe you can but you want some help with the optional
12 services, maybe you have a subcontractor that you've
13 worked with for years; you can send us a letter -- it
14 has to be signed by both you and that subcontractor --
15 explaining that you've worked together, if you get
16 this contract they will continue to do that work for
17 you. In that case you may be able to use their
18 experience in your proposal to qualify for that
19 service.

20 The same thing with an existing joint
21 venture or partnership. When we say existing we mean
22 as of the date that you're submitting your proposal to
23 us, that joint venture was legally in place, so we
24 would get that documentation. There's a lot more
25 about that in the solicitation. When we get to the

1 question and answer period, feel free to ask questions
2 about it. What I have found is that a lot of these
3 questions are very specific. If you have a question
4 about your company, it may be easier if you submit it
5 in writing to us, and we can try and answer your
6 specific situation; because all of them are usually
7 different, so just keep that in mind.

8 Please hold your questions until the end.
9 Sorry.

10 Section 2, responsibility. I mentioned
11 some of these earlier, your System for Award
12 Management record. This, of course, includes your
13 DUNS, Data Universal Numbering System number. This
14 says to include EPLS. EPLS is the Excluded Party List
15 System. So that's who's been debarred, can't do
16 business with the government, weren't playing by the
17 rules. We will be checking that, you guys don't need
18 to check that as part of your proposal. It will show
19 you that in SAM if you ever go in and look at it, but
20 we will be checking that.

21 The representations and certifications;
22 we've talked about, Section K.

23 Financial information on our Form 527. For
24 those of you who haven't seen that; we basically ask
25 you for your company's balance sheet information,

1 income statement information. There is an option on
2 the form you can check to just attach your company's
3 financial statements so you don't have to do both; but
4 you do have to complete part of that form even if you
5 are attaching the forms.

6 And then the pre-award survey, Standard
7 Form 1408, it's fairly self-explanatory if you look at
8 the instructions for that.

9 All of that is required for us in order to
10 determine the responsibility of your company in
11 accordance with the Federal Acquisition Regulation FAR
12 Part 9. We have to make sure we're not awarding
13 contracts to companies who have been debarred from
14 doing business with the federal government. We get in
15 very big trouble if that happens, so those are things
16 we check.

17 Okay, Section 3, technical experience,
18 relevant project experience. This where you might get
19 some questions popping in your head. Write them down,
20 we'll cover them when we get to the end, the question
21 and answer period. So we are requiring that you
22 submit to us three projects per service offering. So
23 if you're submitting to us only for janitorial and
24 landscaping services, and you have three projects
25 where you did both of those; then you only have to

1 send us three projects. You don't have to send us
2 three projects for HVAC, three projects for plumbing,
3 three projects for electrical; if you did any of those
4 on the same project.

5 So, I can't math-wise tell you what the
6 maximum number would be if you're offering all the
7 required and all the optional services; but I would
8 encourage you, if you have projects where you've
9 covered more than one of the services, to use those.
10 Helps you, helps us; we have less to look at, you have
11 less to prepare. But if you don't, if they're all
12 separate, that's fine too. But you do have to have
13 three per service offering, so you have to show us
14 that you've done HVAC three different projects in
15 order to qualify for it. You have to show us that
16 you've done elevator maintenance on three different
17 projects in order to qualify for it. Okay, like I
18 said, projects can cover single or multiple service
19 categories.

20 The projects have to have been completed
21 within the past three years or be ongoing, and that's
22 for the unrestricted solicitation. For the small
23 business, they have to have been completed within the
24 last five years or be ongoing. By ongoing, we mean:
25 you should be at least one year into it. If it's a

1 five-year contract, great, but please don't submit it
2 unless you've been doing for one year; because that
3 doesn't really tell us, past-performance- wise, that
4 you are able to do the work, if you just got it a
5 month ago. So if it's ongoing, it needs to have been
6 at least a year and it needs to be at least a year
7 into it.

8 You can submit projects that you've done
9 for the federal government, state government, non-
10 government commercial; anybody, we don't care,
11 anything that you have. The projects do not have to
12 have been done in the zone that you're applying for.
13 We'll talk about it in a minute. You do get extra
14 credit if they have been, but they do not have to have
15 been performed in that zone.

16 Each project we'll ask you to identify the
17 building type, building size, the number of stories,
18 the services covered, performance period, total dollar
19 value, et cetera, number of trade skills employed
20 versus number of exempt positions employed, and then a
21 detailed statement and description of the services
22 provided.

23 We do have a word limit on it. I think
24 it's a thousand words, or like approximately two
25 pages. We did get a question in San Francisco if

1 you're using one project to cover eight categories,
2 that's not a whole lot of words; so we'll be looking
3 at that too to see if we can come up with a better way
4 to do that, so there's more room to explain what
5 you've done on those projects.

6 Mary mentioned this earlier and I mentioned
7 it a couple of times. There are places where you can
8 get additional evaluation credit. One of those is if
9 the project was for a federal government customer.
10 Again, it's not required; but you will get extra
11 credit if the project was for a federal government
12 customer. If your project involves subcontracting or
13 teaming for services of at least two separate entities
14 that are certified as a small business, that applies
15 only to large businesses.

16 And if you can qualify for any optional
17 services. So you have to qualify for the required
18 services, you also have to qualify for the optional if
19 you're offering them. In other words, you can't just
20 say, "I offer all the optional services;" you have to
21 send in projects for all those, too. We have to make
22 sure that if we're going to say that you can offer
23 them that you're qualified to offer them. For each
24 optional service that you qualify for, you will get
25 extra credit.

1 So if the contract with over three years,
2 you can get extra credit for that. If it was large
3 square footage, if you successfully demonstrated an
4 innovative approach to achieve savings -- that's a lot
5 of words. So what we're looking for there is: did
6 your customer ask you to try and save money on
7 electricity in the building you're maintaining, did
8 they ask you to try and reduce the water usage in your
9 building. If they did, what did they ask you, how did
10 you do it, what were the results. If you can show us
11 that, you will get additional credit for that project.

12 Socioeconomic status certification. So
13 this applies to the small business solicitation. If
14 you are service-disabled veteran-owned small business,
15 you're a woman-owned small business, and you're a HUB-
16 zone small business, you're going to get additional
17 credit for those certifications, and the others too.
18 Those are just the ones I used as an example.

19 Okay. We've talked about the project
20 locations a couple of times. The offeror shall submit
21 a capability statement identifying: your overall
22 capability of providing service coverage for all the
23 states in the zone you wish to provide a proposal for;
24 the states that you have previously or currently
25 provide BMO services in; and if there are states in

1 the zone that you have never provided coverage for,
2 you need to state those and then provide a written
3 narrative identifying your capability to provide
4 coverage to those states.

5 So for this zone, if you've never performed
6 in South Carolina; that's fine, you can still submit a
7 proposal. Tell us how you would perform in South
8 Carolina if you got an offer: would you partner with
9 somebody who's in South Carolina; like I said before,
10 would you open an office in South Carolina and hire
11 more people; how would you do it.

12 This is a really silly thing to overlook in
13 your proposal but it's very important to us because we
14 have to make sure for our customers that we're putting
15 contractors on there that can meet the requirements of
16 the geographic scope. So please don't put three words
17 as your answer to this. Please take some time and
18 think about it, and make sure that you're actually
19 answering the questions in this part of the proposal.

20 Additional evaluation credit. So for the
21 required services, if any of the projects that you
22 submit to us have covered multiple states in your
23 zone, you'll receive additional credit. So again,
24 this is only for the required services. So if I
25 submit a project for HVAC services, and I'm offering

1 on the O&M, and I delivered in Georgia and Florida; I
2 will get additional credit for those. Has to be
3 multiple, and that's, again, to help us get the best
4 of the best, the companies who can perform in all
5 those states.

6 Staffing plan. The staffing plan should
7 identify roles and responsibilities for key employees.

8 Because we're not giving you a specific building to
9 bid on; we're not going to ask you that for all of the
10 employees, because you wouldn't know necessarily all
11 of the employees you'll be using. So we'll ask that
12 for the key employees, the managers, the project
13 managers, who's overseeing this work.

14 The professional compensation plan
15 addresses methodology for determining salaries and
16 fringe benefits for professional employees.
17 Uncompensated overtime policy, policy for addressing
18 that consistent with your cost accounting practices.
19 And I guess I should mention, these are not extra
20 credit, these are required elements of your proposal.

21 Failure to address any of these would get you kicked
22 out. Again, please don't send us a sentence. This
23 should really address the requirements of the
24 solicitation, think about it.

25 For the unrestricted solicitation; if you

1 are a large business, you will be required to submit a
2 subcontracting plan, as we've talked about. We will
3 provide you with a template. This template is kind of
4 a best practice that GSA uses. It doesn't mean you
5 have to use the template; you can submit it in the
6 format that you wish. I do ask that you're careful
7 and you look at what's in the template and make sure
8 that you cover all of that in your plan if it's not
9 using the template, because we do have to go through
10 and check that. Also, make sure that you are
11 addressing the goals for each of the socioeconomic
12 categories, because we will be checking that.

13 One thing that's not on the slide that I
14 will also kind of get on my soapbox about, because I
15 see this a lot, is if you're submitting a
16 subcontracting plan, it will ask you who the plan
17 administrator is, and then at the end somebody has to
18 sign it. These cannot be the same people. It has to
19 be someone who is one level above the plan
20 administrator who signs the subcontracting plan. I
21 don't think that's in the instructions. If you have
22 questions, please let us know. But we do see that a
23 lot and that's something that our small business
24 technical advisors in SBA will look for.

25 The sustainability plan. This asks for

1 your approach toward implementing and promoting
2 sustainable practices in all aspects of BMO services.

3 It gets very detailed in the draft documents about
4 what should be included in this plan. So you're not
5 necessarily starting from scratch, it does give you
6 kind of some bullets of what you need to cover. There
7 is an opportunity here for additional evaluation
8 credit. You do have to submit the plan, everybody has
9 to submit the plan, however, if you can show us in
10 your plan that you've implemented sustainable
11 practices above and beyond the minimum of what we're
12 asking for, you can get additional evaluation credit.

13 The quality control plan. Obviously most
14 of you already have one of these already. A
15 description of your internal review procedures that
16 facilitates high quality standards. You will need to
17 review what we have in the draft documents to make
18 sure that what you're submitting meets the
19 requirements. It does have some specific requirements
20 in there. But hopefully no one is reinventing the
21 wheel there, and you have something already that you
22 can start from.

23 Past performance. So we talked earlier
24 that there could be quite a few projects that you end
25 up submitting for this. We don't want a past

1 performance survey for all of those projects. We want
2 three, no more than three. We want it to be surveys
3 to customers who were some of the projects that you
4 submitted but not all of them, so we want it to be for
5 those and limited to three. Something to keep in
6 mind, there are instructions in the solicitation.

7 But please don't have the customers send
8 them directly to us. We do not want to try and sort
9 out 100 different past performance surveys and what
10 proposal they go with. They should send them back to
11 you and you need to submit them with your proposal.
12 And again, we're limiting it to three surveys total.

13 We will be checking the Past Performance
14 Retrieval System, or PPIRS, but not everybody has
15 government contracting experience so we will not
16 solely be using that, but we will be checking it for
17 companies that have information in there. And again,
18 if past performance information is not available, the
19 offeror will not be evaluated favorably or
20 unfavorably; basically, will get a neutral rating. If
21 you've done business with the government before,
22 that's fairly standard. Not having past performance
23 doesn't count against you.

24 And last but not least, price. So we've
25 talked about that we are awarding the highest

1 technically rated offerors with a fair and reasonable
2 price. So we are still looking at price, price is
3 still important to us. If you looked at the price
4 template, it's probably a lot different than anything
5 you've seen before. We're doing it a little bit
6 differently because there are a lot of considerations
7 in each of the zones. We know that some buildings
8 across the street from each other may have different
9 union agreements, for example. Some of them have
10 different, you know, different wage determinations in
11 different locations within the same zone.

12 So what we've asked for is a breakdown of
13 your fully-burdened rate, the base rate, the health
14 and welfare rate, overhead, G&A -- general and
15 administrative costs, profit, any other costs. That's
16 going to give you a fully-burdened rate. We're using
17 the fully-burdened for the purposes of price analysis
18 at our level. These are not ceiling rates that you
19 will be required to use in your contract. What we
20 will keep the same is the overhead, G&A, profit and
21 other costs. Those will remain fixed for your
22 contract. What will change, depending on where you're
23 performing, is the base rate and the health and
24 welfare rate.

25 For example, the service contract labor

1 standard wage determination for Kansas City is a whole
2 lot different than the one for Washington, D.C., but
3 if ten of us are bidding on one building in Kansas
4 City, we're all using that wage determination. So
5 everybody will have the same base and health and
6 welfare rate, what's different for a company is the
7 rest of the buildup. So we will be evaluating the
8 fully-burdened rates at our level to make sure they're
9 fair and reasonable; basically determining that the
10 elements of your overhead, G&A and profit are
11 reasonable. And then that's what you'll apply at the
12 task order level to whatever wage determination
13 they're using at the task order level.

14 Now, for professional services; you will be
15 submitting to us firm fixed price hourly rates that
16 will stay the same for wherever you're performing in
17 the zone. This is for the non-exempt categories. So,
18 your blue collar services. Anything that's based on -
19 - this says SCA; it should be service contract labor
20 standards is what it's changed to. I don't remember
21 off the top of my head what Davis Bacon has changed
22 to, but it's Davis Bacon. And then CBA would be
23 collective bargaining agreement. So if there's union
24 rates in a specific building, you're all going to have
25 to use the same union rates in your proposals. So

1 what's going to change again are the indirect rates,
2 and that's what we're keeping constant at the parent
3 contract level.

4 We will be asking for government and
5 commercial prices for the categories offered. In
6 other words, if you have government prices already for
7 some of these labor categories, we want to know what
8 that is, we want to know what the commercial prices are
9 as well. In tier pricing, we will be asking for -- it
10 says tier pricing -- kind of basically a volume
11 discount. We will give you the thresholds; so, for
12 example, if a task order is one million to five
13 million, what additional discount would you give the
14 customer, if it's five million to ten million, what
15 additional discount would you give the customer.
16 Everybody will be given the same kind of tiers of what
17 that is; you tell us what discount you would offer.
18 That goes to the overall fair and reasonableness of
19 your price.

20 Okay. I know that was kind of a
21 complicated one to leave it on, but we'll get to
22 questions in just a few minutes, and Mary is going to
23 go over some next steps in the gateway, and then we'll
24 get back to the questions. Thank you.

25 MS. SNODDERLY: Okay. Take a deep breath.

1 That was a lot of information to digest. Right?

2 Let's talk for a second on next steps and
3 what's happening here. You heard this earlier, the
4 draft RFP closes February 5, so that is when all the
5 questions and comments are due on those draft RFPs.
6 And you heard Janet, as she went through her part;
7 there are certain areas -- you're welcome to provide
8 any questions or comments in any of the areas, but
9 there are certain areas we're really looking for your
10 feedback on. You know, that's the type of information
11 that we are needing.

12 Okay. The questionnaire. Janet talked
13 about the questionnaire that's included with the draft
14 RFPs. We're giving you a little bit longer on that;
15 that's due February 19.

16 We also talked about the final RFP expected
17 release somewhere May-June, so Summer of 2016.
18 Expected award is either later this fiscal year or
19 early FY '17.

20 Now, you see an email address up here. I
21 would encourage you to write down this email address.

22 You're welcome to contact us individually, but as you
23 can see, we're traveling, we told you were in San
24 Francisco earlier this week, next week we're going to
25 be gone. This particular email address will go to

1 everybody on our team. We have three contracting
2 officers that are back in the office working
3 diligently this week on Zone 1; and they would have
4 access to this, so they may be able to get any
5 questions answered.

6 I want to take just a few minutes and go
7 through the acquisition gateway. You heard me talk
8 earlier at the very beginning about category
9 management. As part of that, we have the acquisition
10 gateway. Here's the web address for the acquisition
11 gateway. What the acquisition gateway -- is basically
12 a federal community where federal government buyers
13 can go in and share all kinds of information on
14 procurement and everything else.

15 And I know you're saying: "But wait a
16 minute, I'm industry." Just hold that thought. I'm
17 going to tell you how industry can actually access
18 part of this. Right now this is what we're calling it
19 part of what we call our common acquisition platform,
20 or CAP, and this is just a way that that federal
21 community can look and see and find best practices of
22 what others are doing.

23 I know some of these slides are very
24 difficult to read, so I apologize for that. When you
25 go to that web address that I gave you, you're going

1 to come into a sign-on sheet right here. You can see
2 that one says federal employee sign-on for any federal
3 employees -- and industry, you don't have to pay
4 attention to this part -- you would use your OMB MAX
5 sign-on. That's only really relevant to government
6 people.

7 Non-government people, you see there's a
8 non-government sign-in. Now, right now you're not
9 going to have access. I apologize, they're still
10 working through that. Public or industry is not going
11 to have full access to everything that government
12 employees will. I was hoping they would provide me
13 with a list that I could kind of tell you the areas
14 you would have access. Unfortunately, I don't have
15 that yet.

16 Now, they were hoping to get industry
17 access by the end of 2015, some glitches to work
18 through; so they're hoping by the end of this month,
19 by January, that you, industry, will have access. I
20 keep talking about our BMO Interact page. I'm going
21 to give you that website, and we will let you know
22 whenever industry is able to access this acquisition
23 gateway.

24 Now, once you sign on, this is the screen
25 that gives you a whole host of information. We have

1 approximately nineteen of what we're calling hallways
2 that are available right now on the acquisition
3 gateway. What does that mean? Remember I talked
4 about the categories? They're kind of defined by the
5 categories. We actually have a facilities hallway
6 that is up and live right now.

7 Right now we are posting information, you
8 know, "coming soon on BMO." We posted the RFPs when
9 we did back in October for Zone 1, and things of that
10 nature is what we are posting as regarding BMO right
11 now. Schedule 03FAC would also be included on this
12 facilities hallway. So you can see we're trying to
13 get all the information that we can on the different
14 contracts, the different vehicles that are out there
15 into one area.

16 So I just wanted to kind of introduce you
17 very quickly to this, and so that you know that it's
18 you there. Again, watch the BMO Interact page, we
19 will be giving you more information. I'm sure we'll
20 offer training to industry as we go live, and you
21 would be able to learn how to access more information
22 on that.

23 So without further ado, we are ready for
24 the questions and answers. But let me give you a few
25 instructions here. First of all, the Interact page,

1 there you go, I've got it listed right up there on the
2 screen, the BMO Interact page. That is where we will
3 be posting the transcripts to all five events. We
4 will be posting the slide deck. So you will have
5 access to that information. Remember, this is the way
6 we communicate basically with industry. So if you do
7 not have that site, please, please go to there.

8 You can also sign up -- I don't have the
9 information but if you want more information, let us
10 know -- we have what is called a GovDelivery email
11 system. If you want to sign up for that, that way you
12 get emails notifying you when there's anything coming
13 up on the GovDelivery because we typically kind of do
14 both.

15 Now we're getting ready to do questions.
16 We're going to have a couple of people walking around
17 with microphones. What we're going to ask that you
18 do: state your name, your company, and then we are
19 going to have to repeat it into our microphone to make
20 sure that our court reporter gets everything. I think
21 Janet and I and Teresa will be up here to answer any
22 questions, but just make sure that one of the ladies
23 gets to you with the microphone.

24 Okay. Let's start with the questions.
25 Who's going first? We've got hands up everywhere.

1 MR. MILFORD: My name is Art Milford from
2 Valley, Alabama, and the name of my company is Make It
3 Happen, disabled vet. And that's what I'm concerned
4 about. When you put the solicitation out are you
5 going to have set-asides for disabled vets like
6 normally the SBA do, or are you going to have uniform
7 where all socioeconomic groups would qualify?

8 MS. SCHWEER: So Art Milford from Make it
9 Happen in Alabama.

10 MR. MILFORD: Valley, V-A-L-L-E-Y.

11 MS. SCHWEER: Valley. So the question is;
12 when we put the solicitations out are we going to have
13 separate set-asides for service-disabled veteran-owned
14 small business, et cetera.

15 Maybe. It kind of depends on the
16 information we get back form our market research from
17 the questionnaires. In Zone 1 we didn't have the
18 market research to support doing the individual set-
19 asides at our level. We just had -- we knew we had
20 enough small businesses; we didn't know if we had
21 enough in all the other categories to do set-asides.
22 So it will kind of depend on what we get back. But I
23 think Mary mentioned earlier too; if we get -- say we
24 do 40 small business awards, there may be enough
25 service-disabled veteran-owned small businesses in

1 there that at the task order level a customer could
2 still do a set-aside for that.

3 Good question. Back there? Yeah.

4 MS. SNODDERLY: Is this one working now?

5 MS. SCHWEER: I've got to repeat it anyway.

6 We had this in San Francisco, all of a sudden all of
7 our mics quit working -- it was awesome.

8 MR. WALKER: My name is Kit Walker with
9 EBS. You had a slide up earlier that spoke to the
10 partnership-type relationships, joint ventures and
11 something else. My question to you is, is a teaming
12 relationship, which is different than a joint venture,
13 is that part of that offering?

14 MS. SCHWEER: It was Kit Walker?

15 MR. WALKER: Kit Walker.

16 MS. SCHWEER: And I'm sorry, your company
17 was EB?

18 MR. WALKER: EBS.

19 MS. SCHWEER: EBS. So the question is,
20 back on the slide when I talked about the meaningful
21 relationship commitment letters; that was the other
22 one, and the joint ventures or partnerships.

23 So meaningful relationship commitment
24 letters is a very long word for saying, it's basically
25 a partnership. We don't call it teaming in that

1 sense. Teaming is more, it's used more on the
2 schedule side; we're not necessarily having teaming in
3 the formal sense. But basically, it's a partnership
4 with any company that is going to help you perform the
5 services of the contract. And anybody who you need
6 their experience in order to qualify, you need to tell
7 us what your relationship is with that company.

8 It doesn't necessarily have to be like,
9 "oh, we own that company" or "they own us." You know,
10 just: have you worked together for ten years, how
11 does that work. Both parties need to sign it, because
12 basically that other party is saying, "we're promising
13 that we're going to work with them throughout the
14 length of the contract to provide these services."

15 So we want to make sure that company is not
16 going to go out of business the next day, that kind of
17 thing, so tell us a little bit about the partnership.

18 Does that help?

19 MR. WALKER: It doesn't have to be a legal
20 entity?

21 MS. SCHWEER: It does not have to be a
22 legal entity. Correct.

23 MS. SNODDERLY: Sorry. I think we're down
24 to one mic, so we apologize for that.

25 MR. RAY: My name is Christopher Ray. I

1 work with EXP Federal, and my question is kind of a
2 segue from that. So if you were to have a meaningful
3 relationship letter and explain it, would that allow a
4 prime to show the past performance of that
5 subcontractor that was not shared? So let's say,
6 theoretically, that I've got a great project, we've
7 got an existing relationship; but the project that I
8 want to show is not something we worked on together.

9 MS. SCHWEER: Okay. So Christopher Ray
10 from EXP Federal?

11 MR. RAY: Correct.

12 MS. SCHWEER: Good question.

13 So the question was, back on the meaningful
14 relationship commitment letters, if you have a partner
15 where they did a project and you want to use that
16 experience; but you weren't part of that project, you
17 weren't the prime, they weren't the sub, you had
18 nothing to do with it, can you use that company's
19 experience.

20 Yes. If you submitted that letter to us
21 telling us what your relationship is with that
22 company, yes, you can. It doesn't necessarily have to
23 be that you were the prime and they performed it. If
24 you were the prime and you used subcontractors on any
25 of the projects you submitted, that's fine. The way

1 we look at it is; if you were the prime, you were the
2 party that was responsible for getting that work done,
3 so we're going to consider that that was your
4 experience.

5 But in the situation that he raised, that's
6 correct. If you did not do the work, but your partner
7 did; as long as you submitted that meaningful
8 relationship commitment letter to us and explain that
9 to us and they've committed that they're going provide
10 it with you; you can use that experience.

11 Then Patti. Okay, hang on, wait for the
12 mic, please.

13 MS. McMILION: Patti McMilion from SDAC.

14 Related to that, I'm afraid that I
15 misunderstood back in Zone 1 the meaningful
16 relationship letter section in Section M.

17 MS. SCHWEER: Sure. Okay.

18 MS. McMILION: I understood that you could
19 not take credit for a subcontractor's past performance
20 if you weren't related to that contract, even with a
21 letter.

22 MS. SCHWEER: No, with the letter you tell
23 us the commit -- it wasn't that way in the draft for
24 Zone 1. We did make a change to that. So if you have
25 the relationship there, then, yes.

1 MS. McMILION: It says: that if proper
2 structured an offeror may pledge resources from a
3 parent company; GSA will allow --

4 MS. SCHWEER: Can you talk in the mic,
5 Patti? I can barely hear you.

6 MS. McMILION: Yeah. It says GSA will allow
7 offeror to take credit for any evaluation element,
8 including relevant experience as a parent company,
9 affiliate, division or other subsidiary; as long as
10 there's a meaningful relationship with offeror and
11 prior contractors.

12 Outside corporate structures, such as a
13 subcontractor performance; GSA will not allow an
14 offeror to take credit for the evaluation elements.
15 So therefore, in Zone 1 I did not submit any partner
16 other than my JV partner, no subcontractor, and I
17 thought that meant I could not.

18 MS. SCHWEER: Well, I can't address what
19 you did in Zone 1, because we went through the source
20 selection for that.

21 MS. McMILION: So that's different?

22 MS. SCHWEER: No. It's confusing, I admit
23 that, it is confusing. We were trying to make it
24 flexible enough so that other experience can be used.
25 The commitment language that you referenced or the

1 meaningful relationship part isn't necessarily related
2 to that. We'll try and clarify that when we put our
3 questions and answers out.

4 That's what I mean, when I said earlier
5 that -- a lot of these questions are related to the
6 joint venture and the meaningful relationship letters
7 are very specific to your specific situation.

8 MS. McMILION: Okay. Thank you.

9 MS. MCCARTHY: We'll try to clarify that --

10 MS. SCHWEER: Yeah, we better.

11 MS. MCCARTHY: -- in the RFP so that you
12 don't get confused.

13 MS. SCHWEER: And we don't get confused,
14 because we kind of got confused too.

15 MR. MCCOLLORS: My name is Wayne McCollors
16 with Benchmark Property Contractors. My question is
17 in regard to a financial question, and you have to
18 report a list of financial information. So if you
19 have -- can you hear me?

20 MS. SCHWEER: Yes, I can hear you.

21 MR. MCCOLLORS: -- partners or you're using
22 a relationship through the commitment letter, what's
23 the proper way to make sure it's going to be counted?

24 I guess you're going to get credit for
25 having the proper financial requirements, and, you

1 know, we don't know exactly what you're looking for;
2 but if you have unified resources, et cetera, how
3 would you handle that if it's not just all yours, you
4 don't have the capacity and ability alone?

5 MS. SNODDERLY: Wayne McCovers.

6 MR. MCCOLLORS: McCollors.

7 MS. SNODDERLY: McCollors? And what was
8 your company? Oh, Benchmark Property.

9 So the question is related to; if you kind
10 of had a partnership in the financial part of the
11 proposal, how would that be reflected in order
12 basically to show that your offer had the necessary
13 resources to perform?

14 MR. MCCOLLORS: Yes. Even if it's not an
15 official partnership.

16 MS. SCHWEER: Even if it's not an official
17 partnership.

18 MR. MCCOLLORS: Can you help us kind of
19 understand what the requirements? Is there a --

20 MS. SCHWEER: I have to admit that I don't
21 have the financial form memorized.

22 MALE VOICE: I think that the FAR is saying
23 that -- they have to have a way of being submitted

24 MS. SCHWEER: What this gentleman said is
25 that he thinks the FAR says as long as you have a

1 means to get it.

2 In the meaningful relationship commitment
3 letter section it asks in that partnership what
4 resources, basically, will you be using of that other
5 company. If financial is part of that, you would
6 state it there. I don't believe -- and again, I don't
7 have the form memorized so we'd have to check on
8 this -- I don't believe on the actual form 527 it asks
9 for anything about that, but I'm not positive about
10 partnerships. I don't remember exactly what the
11 financial statements say, I'm sorry, but we'll check
12 on that.

13 MR. MCCOLLORS: Can I just ask another part
14 about that question, just for clarity? If you have a
15 commitment letter for the relationship, and it's
16 signed, and for instance, in one of my relationships
17 they're doing government contracting and covering a
18 lot of different areas. However, the field supervisor
19 that's hands-on and in the field, we're aligned
20 together; but the actual company, the prime is not
21 coming under us. So would we have to get permission
22 from the prime on that contract, or would the employee
23 that works under that company be able to use their
24 history?

25 MS. SCHWEER: So the question is, basically

1 is kind of: if you were the subcontractor, you
2 weren't the prime --

3 MR. McCOLLORS: My associate was not a sub,
4 but an actual employee that works in the company and
5 executes the field work; but there's a higher level
6 where they have management above him and owners who
7 are actually the prime on those contracts. Does that
8 make sense? The prime has employees but the employee
9 is looking to expand further and not just be an
10 employee.

11 MS. SCHWEER: Oh, I see. Yeah, so the
12 question is -- let me try and restate this one, I'll
13 do my best -- if, say, an employee was in the field,
14 managing a project; working for another company -- his
15 company was the one who got the work, was the prime,
16 can they use that experience?

17 MR. McCOLLORS: Yes.

18 MS. SCHWEER: I have to admit I don't know
19 what the solicitation says off the top of my head on
20 substitutions for personal experience. I think it
21 addresses it, but we will have to check on that one.
22 I know that in our discussions as a team basically we
23 want the experience of the prime. If it was a
24 subcontractor to a prime, that experience cannot be
25 used.

1 I'll have to check on that because I'm not
2 sure what it says on that, on substitution for
3 personal experience, because usually that's addressed.

4 And again, I apologize, Josilyn Reed is our senior
5 contracting officer that's back in Kansas City right
6 now working on Zone 1. And she has all of this
7 committed to memory, and I just don't quite yet. So
8 we will check on that when we have it recorded. Thank
9 you.

10 I saw hands but I don't know who was next.

11 Do you?

12 MS. SNODDERLY: I'm not sure. Just know
13 that we'll get to you.

14 MR. SMITH: I'm Don Smith with Infinite-ABM
15 JV.

16 You noted that the solicitations for all
17 the zones would be published later, early in the
18 summer. Are they going be published simultaneously or
19 released on a schedule?

20 MS. SNODDERLY: So Don -- Smith? From
21 Infinite-ABM.

22 The question was we said that we would be
23 releasing the solicitations for the rest of the zones
24 in late May, early June, in the summer, will be
25 releasing them all simultaneously. And we don't know

1 yet. That's a good question. We anticipate, and we
2 will try to get them out as close together as we can.

3 We did get a question in San Francisco that was a
4 good question, and that is if you're trying to bid on
5 all the zones, that's a lot of proposals to do all at
6 once. So we're going to think about that too and
7 think about how we're going to put those out.

8 MR. JONES: Patrick Jones from Libra
9 Management Group. Good morning.

10 My question is regarding the meaningful
11 relationship commitment letter. Is there a duration
12 cut-off required with regards to how long that
13 relationship has existed? For instance, if I've just
14 recently formed a relationship with that contractor;
15 versus a relationship that has existed, as you
16 mentioned, for maybe five or ten years, do you
17 evaluate those differently?

18 MS. SCHWEER: So Patrick Jones, and I'm
19 sorry, what was the company?

20 MR. JONES: Libra Management Group.

21 MS. SCHWEER: Libra Management.

22 And the question was with regard to the
23 meaningful relationships, is there kind of a time
24 frame that we're looking for or require for how long
25 that relationship has been in place. And to my

1 knowledge, there is not. We will double-check, but I
2 don't believe there is, as long as it is in place
3 prior to submitting your proposal. In other words,
4 don't submit your proposal and say: "Well, I don't do
5 electrical services but if I get this award, I can get
6 someone who does electrical services." That's not
7 going to work, so it has to be place before.

8 But as far as to like how long it has to
9 have been in place, I'm not sure if that's addressed,
10 so we'll have to double-check.

11 MS. OLLANOVE: Tiffany Ollanove,
12 WorkingBuildings.

13 Question about the fully-burdened rate. In
14 the past our tax department has kind of objected to us
15 breaking down, because that's not how we determine our
16 GSA rates. They're actually determined by what we
17 invoice and what current clients pay.

18 MS. SCHWEER: Okay. Tiffany, what was your
19 last name?

20 MS. OLLANOVE: Ollanove.

21 MS. SCHWEER: Ollanove, and
22 WorkingBuildings?

23 So the question is kind of explain more on
24 the fully-burdened rate. The accounting department at
25 your company doesn't normally like to break it down

1 that way since you guys don't normally do it, and I
2 understand that.

3 But the GSA schedule rates are firm fixed
4 price ceiling rates, hourly rates, based on a discount
5 from you most-favored customer, and these are not
6 based on that. These are not discounted rates from
7 your most-favored customer, we're not asking for your
8 most-favored customer.

9 Really, the challenge that we had with this
10 was all the feedback we got that: "Well, on this
11 building it's union and this building it's not union;
12 how are we going to account for all those differences
13 in that without doing a ceiling rate?" Ceiling rates
14 can get confusing for the customers, especially they
15 can be overcharged in that situation.

16 I would say if you haven't already, take a
17 good look at the price template; talk to your
18 accounting department, see if they can come up with
19 that. In our research and from Zone 1 what we learned
20 was: your company has an overhead rate, your company
21 has a G&A rate. Your profit rate, you know, that may
22 be where the discount kind of comes in.

23 If you're doing a commercial job, your
24 profit rate may be 15 percent; if you're doing it for
25 the government, obviously we always want lower prices

1 so maybe it's 5 percent for that. So take a look at
2 it and see if they still are having problems, if you
3 have feedback for us on a different way to do it,
4 we're open to that too.

5 MR. ALVAREZ: Isreal Alvarez from Multi Air
6 Services.

7 Basically, I have two questions on the
8 financial and accounting side. First of all, is the
9 bonding capacity, if there's a bonding capacity
10 agreement required on this contract or it's on the
11 task order level? And then the other one, are we
12 required to submit the acceptable accounting system
13 approved by DCMA and also the purchasing system.

14 MS. SCHWEER: Great question. So Isreal
15 Alvarez from Multi-Air Services.

16 The first question was on bonding, if we're
17 requiring bonding; and we are not requiring bonding at
18 our level. If that's needed at the task order level,
19 they will ask for that at the task order level.

20 The second question was are we asking for
21 certified cost accounting systems, purchasing systems,
22 estimating systems in accordance with the Defense
23 Contract Management Agency, or DCMA, and we are not.
24 Because we are not using non-commercial terms and
25 conditions, or cost reimbursement contract types; we

1 are not asking for any of that.

2 MR. DEVEZIN: I'm Wayne Devezin with MBEC
3 Electrical Contractors.

4 My question was --

5 MS. SCHWEER: Okay, it was Wayne, what was
6 your last name?

7 MR. DEVEZIN: Devezin.

8 MS. SCHWEER: Devezin, and it was from
9 MBEC? Is that right? Okay.

10 So the question was is GSA or do we have a
11 kind of consistent profit percentage that we would be
12 looking for?

13 MR. DEVEZIN: Is there a standard profit
14 margin?

15 MS. SCHWEER: Is there a standard profit
16 margin? No, there isn't. It doesn't necessarily be,
17 you know; your company has a standard profit for
18 everything. Some companies have different profit
19 centers, depending on which services you're
20 performing, you know. If the section in your company
21 that deals with BMO services has a certain overhead, a
22 certain profit, a certain G&A, you can propose that.
23 So no, there's no standard that we're looking for.

24 At our level, we're going to end up looking
25 at your fully-burdened rates for whatever wage

1 determination. So I guess I didn't explain this, let
2 me take a second to explain this.

3 So for example, for Zone 3 we'll be giving
4 you the Atlanta wage determination. That's what you
5 would use in your price proposal to build up your
6 rates, so everybody is going to be using that. We'll
7 look at the fully-burdened rates and compare that with
8 our market prices that we have in our database to see
9 where your prices fall.

10 MR. PEMBERTON: My name is Fred Pemberton.
11 I'm with PO Solutions.

12 My question is if you have a partner in the
13 contract and everything and if you have a falling out
14 with that partner, is the process the same to get a
15 new partner?

16 MS. SCHWEER: That's a good question.
17 Fred, what was your last name?

18 MR. PEMBERTON: Pemberton.

19 MS. SCHWEER: Pemberton. And your company
20 was?

21 MR. PEMBERTON: PO Solutions.

22 MS. SCHWEER: PO Solutions.

23 The question was so if you have a partner
24 that you're working with for a specific service and
25 you have a falling out with that partner, what's the

1 process for getting that partners replaced. And
2 that's a good question. I'm not sure I have an answer
3 for that, or if we addressed that in the solicitation.

4 So maybe Josilyn would have it off the top of her
5 head, but I don't, so we'll have to get back to you on
6 that one. Good question.

7 MR. SMITH: Don Smith, Infinite-ABM JV.

8 Are we required to use DCAA approved
9 overhead rates?

10 MS. SCHWEER: So the question from Don
11 Smith, Infinite-ABM: Are you required to use DCAA --
12 which is Defense Contract Audit Agency -- approved
13 overhead rates? No. You sure can.

14 MR. SMITH: And if those rates change
15 during the course of the contract, is there an
16 escalation clause in the contract?

17 MS. SCHWEER: If the DCAA rates changed?
18 Or, just if any of them --

19 MR. SMITH: If your DCAA rates change,
20 approved rates change, is there an escalation clause
21 in the contract?

22 MS. SCHWEER: You will propose an
23 escalation rate for your professional services. I
24 don't remember if there's -- think the only one we
25 built in for the non-exempt categories was based on

1 the wage determinations wherever you're performing, so
2 I don't think that we have anything built in there for
3 the changes in those rates. Submit that question to
4 us, though, and I'll talk to Josilyn and see if that's
5 come up before. I don't remember if it has, so good
6 question.

7 MR. MILFORD: Art Milford from Make It
8 Happen.

9 I'm kind of confused here. When you put
10 the solicitation out, and you gave the different
11 aspects of what does a contractor have to comply to;
12 are the contracts going to be set to a specific group
13 of contractors? Like for example, are you going to
14 have a pre-bid conference for all the contractors to
15 bid on the job, say across the street, in Zone 3, or
16 are you just going to put the contract on the FBO and
17 it's open to everybody?

18 MS. SCHWEER: So Art Milford with Make It
19 Happen Company.

20 So the question is if we award to certain
21 vendors, are we going to invite them all to a pre-bid
22 conference to bid a certain building, are we going to
23 put on FBO. So let me see if I can take this kind of
24 step by step.

25 So, at our level, we'll be awarding a

1 number of contracts. That is not for any specific
2 requirement. So the customers will have to decide
3 that they want to use this vehicle for the
4 requirements. It is not mandatory for them to use
5 this vehicle. They could still use a GSA schedule
6 contractor if they wanted to. They could still do
7 their own open-market procurement, which, of course,
8 we don't want them to because that's not as efficient
9 for the government.

10 So if, for example, the contracting
11 officers procuring services for this building wanted
12 to get services, they could decide to use this and
13 they would send out their solicitation to all the
14 vendors who qualified to provide the services they
15 wanted.

16 So if they only wanted HVAC services for
17 this building, they would send it out to everybody who
18 had HVAC services on their contract for this, but they
19 don't have to use this contract. Of course, we want
20 everybody to use this contract, but we have to kind of
21 sell it, kind of, too.

22 Does that answer your question?

23 MR. MILFORD: Yes.

24 MS. SCHWEER: Yes, sir.

25 MR. MAYFIELD: My name is Andre Mayfield

1 with WorldScapes.

2 My question is about the zones themselves.

3 You briefly spoke about this. If you're not letting
4 the contract out until later in the year, what is it
5 to say that additional states will be added to these
6 zones, and have you plans to do that?

7 MS. SCHWEER: Okay. Andre, thank you.

8 Andre Mayfield, and the name of the company again was?

9 MR. MAYFIELD: WorldScapes.

10 MS. SCHWEER: WorldScapes.

11 So the question was between now when we
12 have our draft out and when we issue the final,
13 there's changes to how our zones look, how does that
14 impact the pricing. Is that basically it?

15 MR. MAYFIELD: How do you plan to
16 compensate for that?

17 MS. SCHWEER: Okay. So how we going to
18 account for any changes. So this is a draft. We're
19 not actually for anyone to submit a proposal right
20 now. Don't send us your pricing right now, don't send
21 us any of that right now. We want you to submit the
22 questionnaire and any questions that you have. So
23 we're going to take that, decide if we need to make
24 changes to the zones, and then -- you know, if we
25 need to make them bigger, if we need to make them

1 smaller, if we need to change something -- we will put
2 that back out on our Interact site with major changes
3 that we're making.

4 We will do that before we issue the final
5 requests for proposals. So you'll know what changes
6 we made, we will issue the final requests for
7 proposals; and at that time if your company is
8 interested in submitting a bid, you would put your
9 proposal together.

10 MR. MAYFIELD: And how do you go back for
11 Zone 1?

12 MS. SCHWEER: How do you go back for Zone
13 1. We were talking about this earlier. So Zone 1,
14 it's kind of too late for the first phase of that, we
15 are working on the awards for that. We will continue
16 to look, as we go forward, to see what kind of demand
17 is coming through, how many orders are coming through,
18 do we have enough vendors. We'll probably look at
19 that in a year, year and a half, see if we need to
20 open it back up. So there could be more opportunity
21 in Zone 1, we're not sure yet. It's not a promise but
22 we will look at it, we will get it.

23 MS. SNODDERLY: We do have a second mic, I
24 think, up and running now.

25 MR. RHODES: Good morning. This is Swin

1 Rhodes from GSA/PBS.

2 The question is with regard to; in terms of
3 companies adding subcontractors to their current award
4 or current contract, how is that going to be handled,
5 or is there a time frame to update their subs, or
6 should we just do that at the task order level?

7 MS. SCHWEER: It was Swin?

8 MR. RHODES: Swin Rhodes.

9 MS. SCHWEER: Swin Rhodes from PBS.

10 So the question is, at the task order level
11 if the contractor is using subs, I guess, that maybe
12 we weren't aware of at the parent contract level; how
13 will that be handled. Is that right?

14 MR. RHODES: Yes. You'll be evaluating
15 with their partner letters and subs as well?

16 MS. SCHWEER: Clarify, kind of two
17 different answers. So if a company qualifies for all
18 the services on their own, then we're not going to ask
19 them who their subcontractors are going to be. So if
20 they want to use subcontractors at your level, of
21 course you can definitely ask them what subcontractors
22 they're going to use, if any. If they're using some
23 kind of relationship to qualify at our level, then
24 they will have submitted a meaningful relationship
25 commitment letter somehow to tell us who that would

1 be. And then that gets back to this gentleman's
2 question of: if that changes, how will we handle
3 that, and that's what I'm going to have to check on.

4 So for the most part, if the company is
5 qualifying on its own for the services that they're
6 offering; we're not going to ask them what
7 subcontractors they plan to use or they may plan to
8 use.

9 MR. RHODES: And the concern is, of course,
10 we're going to be looking at fair opportunity which
11 would be one of the stipulations, plus we're going to
12 look at just those subs that have been submitted. So
13 that was kind of a concern if we put something out
14 there and these contractors maybe specialize in HVAC
15 or whatever, and then we'll get some of the others
16 that say, well, you know, I can add a sub.

17 MS. SCHWEER: Okay, I see what you're
18 saying. I'm going to use a different service as an
19 example, because if they're offering HVAC, everybody
20 will have HVAC.

21 So if you're looking for fire alarm
22 services and you go out to all the fire alarm
23 companies, or the people who have fire alarm services;
24 but then another company hears about it and says,
25 "well, I can do that," you don't have to consider them

1 because they don't have that as part of their BMO
2 contract. They would have to come to us, show us that
3 they can qualify for it, and then maybe we could add
4 it. But yes, they couldn't do it.

5 MR. RAY: Chris Ray, EXP Federal.

6 So my firm and probably some other firms in
7 here have facility clearances and have cleared people,
8 so how do you plan or do you ever plan to allow these
9 other agencies who would need clearance, everybody
10 would have to be cleared, how do you plan to solicit
11 for that, because obviously some firms have
12 clearances, some firms probably wouldn't. And then
13 also, how would you plan to deal with the wages for
14 that since generally the wages would be different for
15 cleared persons.

16 MS. SCHWEER: And it's Chris Ray from EXP
17 Federal. Is that right?

18 So the question is; some companies may
19 already have employees that have clearances for
20 certain facilities or certain agencies. So sometimes
21 the people have clearances, the companies have
22 clearances, how are we going to handle that because
23 some agencies will have those requirements.

24 I believe this is addressed in the
25 solicitation; and we don't require any facility

1 clearances or people to have security clearances. If
2 that is required at the task order level, the agencies
3 will dictate that to you. And I believe it also says
4 that if changes in the wages are necessary based on
5 that, that can be negotiated at the task order level.

6 MR. RAY: So then let's say there's fifteen
7 awards and you have a cleared agency that wanted HVAC
8 services, there were fifteen awardees that could
9 provide HVAC services but only five of those were
10 cleared, would they likely only go to those five?

11 MS. SCHWEER: Let me repeat the question.
12 The question was; if an agency or a cleared facility,
13 and we say there was fifteen companies that offered
14 the service but only five of them had clearances
15 already, does the agency only go to those five that
16 have the clearances?

17 Do you know the answer to that, Teresa?
18 I'm relying on DoD experience here.

19 MS. MCCARTHY: They would go to all of the
20 IDIQ holders. However, they may have the opportunity
21 to get those clearances, it would just depend, it
22 depends on the situation. And obviously, the five
23 that have got them already would probably be main
24 contenders.

25 That doesn't mean it would always be the

1 case, but it would depend. But that's a good
2 question, and our DoD facilities will need those, so,
3 you know, we'll make sure that the language is as fair
4 as possible to everybody in the RFP.

5 MS. SCHWEER: Thank you, Teresa.

6 MR. ALVAREZ: If we submit, for example,
7 four services that are required services and we add
8 additional services later, does that change the
9 schedule?

10 MS. SCHWEER: So the question is from
11 Isreal Alvarez from Multi Air Services.

12 MR. ALVAREZ: Yes.

13 MS. SCHWEER: Okay. The question was if
14 they submit and qualify for the required services, and
15 receive an award at the IDIQ level; could you add
16 services later like you could with schedule by
17 modification. Yes. That was an easy one.

18 There's one back there. Patti.

19 MS. McMILION: Patti McMilion from SDAC.

20 I've been reading, on my phone, the current
21 draft. Just to be clear, I thought I heard you say or
22 indicate that; if we didn't have experience, say, in
23 elevator, we could team with an elevator company by
24 getting a meaningful relationship letter and using
25 their experience to submit.

1 When I read Section M, it seems to instruct
2 otherwise, to me. My interpretation is that in
3 Section M it says that no contract for a teaming
4 arranging with a client's sub is permitted under the
5 solicitation to be submitted, only teaming with an
6 entity that is registered such as a joint venture
7 that's legalized.

8 Then it goes on to explain that you can
9 submit experience from those two companies or more
10 companies who are in that legal entity or in that
11 registered entity, that joint venture. It indicates
12 that no CTA with a prime sub may be submitted with
13 this.

14 So that's where I'm confused, that we could
15 use subcontractor loose teaming arrangements to try to
16 qualify for this. My understanding and interpretation
17 was that to qualify, the experience had to be from the
18 prime or the prime's JV partner but not from
19 subcontractors for the small business.

20 MS. SCHWEER: I'm going to attempt to
21 repeat that question, Patti. And I will apologize up
22 front, because Josilyn would probably be the best one
23 to answer that question, I'm working off of my
24 understanding of this from Josilyn. She's the one who
25 wrote the solicitation originally so she has the best

1 understanding of it. So this is my understanding of
2 it from her as we've worked through this.

3 So the question from Patti McMilion from
4 SDAC, looking at the current Zone 1 solicitation, it
5 seems to indicate that you cannot use the experience
6 of another company in a meaningful relationship
7 commitment letter in order to qualify for those
8 services.

9 So we're going to have to look at that
10 again, Patti, is the best answer I have. I don't have
11 any of it in front of me. I'm sorry. We're going to
12 have to go back and look at that, because my
13 understanding, from my discussions with Josilyn, the
14 contracting officer, on it was that's what the
15 meaningful relationship commitment letters were for.
16 I don't know what else they would be for if they're
17 not for that.

18 Well, I mean, it wouldn't be a
19 subcontractor, right, because if it was a
20 subcontractor, then the prime would use the prime's
21 experience and it wouldn't matter who they had
22 subcontracted to. So we're going to have to look at
23 it again, is the best answer I have for you right now.

24 MR. WALKER: Kit Walker with EBS.

25 I'm a small service-disabled veteran-owned

1 company, and two statements that need clarification.

2 One is to the young lady who talked about the
3 meaningful relationship.

4 Just for clarification, on your end as a
5 small service-disabled veteran-owned company, there
6 are certain companies that deal with certain areas of
7 the federal government, and I just want to get some
8 clarification that a small company who hasn't done any
9 security requiring job isn't getting pushed out
10 because they just haven't done those jobs before.
11 That's a concern of mine.

12 The second concern that I have, which
13 requires some clarification from you guys, is in
14 reference to the meaningful relationship. When you're
15 talking about subsidiaries and so forth, you might be
16 a small company, but most small companies that I know
17 don't have subsidiaries for doing certain things in
18 other areas, so that's also a concern of mine.

19 If, for instance, I'm in let's say
20 janitorial, and we do other facility support service
21 with some of our clients; well, I want to be able to
22 have the flexibility to be able to bring on a partner
23 that I've dealt with in other areas that might not
24 fall under the same description that she just
25 mentioned. And again, that's a concern of mine as a

1 small business, to make sure that true small
2 businesses aren't being pushed out because of those
3 terminologies.

4 MS. SCHWEER: So it was Kit Walker from
5 EBS. Sorry, there's a lot of people here.

6 So the first question was about the
7 clearances, to make sure that a small company who
8 didn't already have any of these clearances wouldn't
9 be pushed out. Now, I believe what Teresa was trying
10 to say any company who was bidding on that would have
11 to be given the opportunity to get those clearances.
12 So, yeah. That's what we were saying.

13 And then the second part of the question
14 was back on the meaningful relationship commitment
15 letters. For a small business who may only offer
16 janitorial services but may want to -- you had two
17 questions, let me answer the first one before you get
18 to the second one.

19 MR. WALKER: As part of the growth
20 strategy, offering some other service outside of that
21 and now there's an opportunity for them to do that and
22 they might want to partner with someone in a
23 meaningful relationship.

24 MS. SCHWEER: So a company who may not have
25 actually performed the services but they want to

1 expand in a certain area, may want to partner with
2 another company who does perform those services in
3 order to try and expand what they can offer. And I
4 think your question is, you just want to make sure
5 that small businesses aren't excluded from having
6 those opportunities to grow.

7 And that's where we're going to look at
8 that language again; because we want to make sure that
9 there's ample opportunities there, too, for small
10 businesses. And what we recognized originally was if
11 we make it too restrictive on who can perform and what
12 experience we're taking, we could be restricting our
13 pool.

14 So that's why, we're going to take a look
15 at that again. It was confusing in the draft and it
16 was a little bit confusing in Zone 1, and that's part
17 of this process, we want to know how we can explain it
18 better

19 And again, Patti, I apologize for not being
20 able to explain it as well, but that was my
21 understanding from Josilyn about most of this, so
22 hopefully I haven't misspoken completely inaccurately.

23 But we will get clarification on that out and make
24 sure it's prominent when we put these questions out.

25 MS. SNODDERLY: Excuse me. Before we go to

1 the next question, I know we've got some folks
2 leaving. I just want to make another announcement.

3 On the emails that we will be sharing, your
4 company contact information. If you do not want us to
5 share that with other attendees here and the other
6 four sessions, please notify us so we will not share
7 that information. Otherwise, the list is going to go
8 out. I just wanted to kind of make that announcement
9 because I know folks are kind of leaving here.

10 MS. MATHEWS: I'll be brief. Lynette
11 Mathews, Constructive Ingenuity.

12 Just another quick question about small
13 business. If the task order at the contracting office
14 level is being issued; are they at liberty to exercise
15 a set-aside, say on an 8A or a WOSD, and sole-source
16 that via a contractor on the list?

17 MS. SCHWEER: Lanette, what was your last
18 name again?

19 MS. MATHEWS: Mathews.

20 MS. SCHWEER: Mathews. And your company?

21 MS. MATHEWS: Constructive Ingenuity.

22 MS. SCHWEER: Constructive Ingenuity.

23 So the question was, on the small business
24 set-aside, for example; at the task order level can an
25 agency do a set-aside for a woman-owned small business

1 or an 8A and sole source. I believe that answer is no
2 for this, isn't it, Teresa?

3 MS. McCARTHY: We're going to check. 8A
4 you may be able to, so we'll check.

5 MS. SCHWEER: 8A is different. Yeah. I'm
6 sorry.

7 MR. ROBERTS: Tom Roberts, River To Tap.
8 Do you know have any idea of how many you
9 awards plan on doing for each region?

10 MS. SCHWEER: It was Tom Roberts, and what
11 was the company?

12 MR. ROBERTS: River To Tap.

13 MS. SCHWEER: River To Tap.

14 The question was, do we have any idea of
15 how many awards we'll be making in each zone. Not
16 yet. We will and that will be posted when we do. I
17 can tell you that for Zone 1 we were anticipating
18 about ten awards for the unrestricted and forty for
19 the small business. However, that is probably is a
20 little bit bigger, if not size-wise, money-wise zone
21 than some of these other ones. Obviously, California,
22 Texas, those are all big, even this zone is pretty big
23 geographically.

24 So we will, we look at the spend and we
25 look at the number of vendors and orders and a lot of

1 other data points that we look at, but we'll put that
2 out when we know it. And again, those will be
3 anticipated numbers.

4 MS. GORANSSON: Barbara Goransson, Venergy
5 Group, LLC.

6 My question is once the final solicitation
7 is posted, how long are you going to give us to
8 respond

9 MS. SCHWEER: Barbara Goransson with
10 Venergy Group, and once the final solicitations are
11 posted, how long will we give you to respond. That's
12 a great question.

13 It's a big proposal and some of it may
14 depend on if we put them all out at the same time,
15 because we recognize that some companies will be
16 submitting more than one. And what was, did we start
17 with 45 days this time and end with 60, almost 60?

18 MS. SNODDERLY: Yeah, we did, that was
19 started with 45.

20 MS. SCHWEER: And we know those are really
21 aggressive timelines. We are internally on very
22 aggressive timelines, so we will do our best to give
23 you ample time. If you need more time, you've just
24 got to tell us, too, that you need more time and kind
25 of why; that helps us justify it if we get to that

1 point. So that's my best answer right now, Barbara.

2 Yeah, Don? Let's get you a mic.

3 MS. SNODDERLY: Hang on. Let's get you a
4 mic.

5 MR. SMITH: Don Smith, Infinite-ABM JV.

6 Can we use MATOCs as relevant past
7 performance?

8 MS. SCHWEER: Don Smith from Infinite-ABM.

9 He asked if you can use MATOC. MATOC, if anybody
10 doesn't know, is multiple award task order contract.
11 You mean like individual orders underneath that, is
12 that what you're asking? I don't remember what it
13 says in there.

14 MR. SMITH: Can you cite the whole MATOC
15 document?

16 MS. SCHWEER: I believe you can; I'll have
17 to double-check. He asked if you cite the whole MATOC
18 and basically all the services that you did under
19 that, and I believe you can. We'll double-check.

20 Okay. Yes, sir?

21 MR. DAVIS: Ronnie Davis, Davlin
22 Development.

23 Substitutions for past performance, can you
24 explain that, what can you use? I'm a small business,
25 I recently retired from the military, so I'm trying to

1 figure out how to build my past performance.

2 MS. SCHWEER: Okay. It was Ronnie Davis,
3 and I'm sorry, what was your company?

4 MR. DAVIS: Davlin Development.

5 MS. SCHWEER: Davlin Development.

6 Okay. The question was a small business or
7 a new business with limited past performance
8 experience, what kind of substitutions can you do for
9 past performance. And I'm sorry, without it in front
10 of me, I don't have that part as down as I should, so
11 we'll have to get back to you on that one. I thought
12 that there was some kind of provision in there that
13 addressed that, but I don't know if off the top of my
14 head without pulling it up. I'm sorry.

15 MS. SNODDERLY: Sorry, I just want to make
16 another quick announcement. I know in some cases
17 we're not able to answer the question. Questions
18 Janet says we'll have to get back to you, we will be
19 posting the answers to the questions to the BMO
20 Interact page. So it doesn't mean that we're going to
21 come back necessarily directly to you, but we will be
22 posting those answers.

23 MS. SCHWEER: And that's part of why we
24 have this lovely young lady down here recording all of
25 your questions, because we will put that in our master

1 list of all the questions that we post out there. We
2 will go back through, like we did for Zone 1, and
3 painstakingly pull the questions out and make sure
4 that we're answering those.

5 MS. SNODDERLY: Other questions? Now is
6 the time to ask.

7 MS. SCHWEER: Yes, Patti.

8 MS. SNODDERLY: Oh, hang on. We'll get you
9 a mic.

10 MS. McMILION: Would you allow past
11 performance from a GSA schedule contract?

12 MS. SCHWEER: Yes. Patti McMilion, SDAC.
13 Would we allow past performance from a GSA schedule
14 contract? Yes.

15 MR. HENDERSON: Buddy Henderson with VW
16 International.

17 This you might want to answer later, but do
18 you see a certain format at the task order level for
19 proposals? Have you gone that far?

20 MS. SCHWEER: That's a good question.
21 Buddy Henderson from VW International. He asked if we
22 have kind of a specific format for the proposals at
23 the task order level. We will have templates that we
24 post that contracting officers can use.

25 You know, some may have formats that they

1 already want their proposals to come in; but if they
2 don't, we will help them out with that. That will be
3 on our website so you all can see that and get
4 familiar with it. It doesn't necessarily meant that's
5 what they'll use.

6 Okay. Yes, was there one over here? Okay,
7 up in the front.

8 MS. LOKEY-FLIPPO: Laura Lokey-Flippo with
9 the Corps of Engineers. Is the contract access fee
10 negotiable?

11 MS. SCHWEER: Okay. Laura Lokey-Flippo
12 from the Corps of Engineers. Is the contract access
13 fee negotiable? That's a great question. Some of you
14 may be familiar or may not be familiar, there's a GSA
15 vehicle out there called OASIS. It's a professional
16 services strategic sourcing initiative. They have
17 some different contract access fees that they have
18 negotiated with certain agencies. That is based on
19 how much those agencies are committing to use the
20 vehicle, so they were able to lower it for those
21 agencies based on that commitment. So we would kind
22 of be in the same situation, we would look at the
23 commitment that we are willing to get from an agency.

24 That's not something we've really talked
25 about much today, but we do go out to our commodity

1 team agencies, ask them for commitments to use the
2 vehicle. So based on that, we may be able to
3 negotiate that down.

4 What we've discovered is, we have a little
5 bit of a challenging situation compared to OASIS in
6 that we're going out in zones. That reduces the, kind
7 of, total amount of spend that could be going through
8 it. For example, on OASIS the Air Force committed to
9 like \$500 million. Well, that's worldwide. So we're
10 going out a zone at a time so that the commitments
11 aren't quite as high as that.

12 MR. WALKER: Kit Walker again. Just one
13 question. Will this vehicle be replacing any of the
14 vehicles out in this space right now?

15 MS. SCHWEER: That's a great question. So
16 Kit Walker with EBS. Will this vehicle be replacing
17 any other vehicles out there? It will not be
18 replacing the multiple awards schedule, the Schedule
19 03FAC. It's a different tool.

20 We cannot tell you if there are any
21 specific contracts that it will be replacing. What
22 could happen is a contract could be expiring for these
23 similar services and an agency may decide to use this
24 for a future contract instead as of going back out on
25 their own. So it's not intended to replace any

1 specific government-wide multiple award contract
2 that's out there. We hope agencies will use it.

3 So that's the best answer I have to that
4 question. We don't have specific contracts that it's
5 replacing.

6 There's no -- oh. There's no commitment
7 range for some agencies?

8 We do have some commitments from agencies,
9 it's definitely not all of their spend, and it's not
10 necessarily for specific buildings or locations or
11 contracts. Like I said, before, it's not mandatory
12 for agencies to use it. We get the commitments to
13 make sure that we're putting something out and that
14 people want to use it, but there's not specific
15 contracts that they've identified that, yes, this is
16 definitely going to go to BMO.

17 MR. WALKER: Thank you.

18 MS. SNODDERLY: Other questions?

19 MR. RAY: So just one other question.

20 Chris Ray with EXP Federal.

21 So if I remember correctly, on Zone 1 there
22 were restrictions about paying for travel, which
23 obviously makes sense if you have some recurring every
24 day person. But some of those services, obviously,
25 inherently are services that are going to be like a

1 one shot, it might be a few weeks or a few times as
2 opposed to a person working the whole time. So if you
3 were to have a place of performance that was, say,
4 kind of far flung, that nobody would have an office
5 there, would you ever allow for travel expenses?

6 Just as an example, if there was a
7 commissioning job in a facility that nobody really had
8 an office near, it would be really hard to just use
9 the existing rates without including some travel on a
10 smaller job.

11 MS. SCHWEER: So Chris Ray with EXP
12 Federal. The question was; we do get kind of specific
13 in the solicitation about travel costs, and that
14 basically you're not going to get a lot of that travel
15 cost, and how would that be handled. There could be
16 an opportunity within this contract where anybody who
17 was bidding on it would basically have to travel to
18 get there.

19 What comes to mind for us from Zone 1 is
20 like West Virginia, there might not be a lot of
21 offices out there. Where nobody might have an office,
22 and there might have to be travel involved. The
23 intent of the travel restrictions we have in there is
24 we don't want, necessarily, a company from Nebraska
25 putting in an offer from Zone 1 that they qualify for;

1 and then try and say, you know, "we've got to send all
2 these people from Nebraska out there, we're going to
3 travel and send them all out there."

4 I think there is flexibility in there -- I
5 don't have the exact language, but I think there is
6 flexibility in there at the task order level. If the
7 task order contracting officer feels it's justified,
8 then they can approve that. So if that came up, I
9 would suggest in your proposal that you submit a
10 question to the contracting officer and say, "what
11 provisions would you allow for travel because of this
12 remote location."

13 Good question.

14 MR. RHODES: Swin Rhodes from PBS.

15 I just want to ask you do you foresee this
16 as becoming a schedule vehicle in the future?

17 MS. SCHWEER: Swin Rhodes from PBS. Do we
18 foresee this becoming a schedule vehicle? No, we do
19 not. We intentionally built in flexibilities into
20 this that we know might be kind of lacking in the
21 schedule, so we were trying to make it more flexible.

22 We know that especially PBS sometimes has some
23 challenges with using a schedule, so we were trying to
24 account for that in building this vehicle.

25 MR. RHODES: I know there was a question

1 earlier with regards to the socioeconomic goals. And
2 we're starting to use schedules more here now for
3 ordering services, but within those schedules we try
4 to carve in some of those socioeconomic contractors
5 because we are bound to meet those goals. So as I
6 understand here, you haven't made a decision now to
7 incorporate those, so I'm just saying again that is an
8 incentive for us to these vehicles so we can target
9 from time to time the socioeconomic categories.

10 MS. SCHWEER: So his comment was, you know,
11 basically that PBS, as a buyer, they are starting to
12 use the schedule more and more for their O&M services
13 and within that they can target and set aside certain
14 socioeconomic categories, something to keep in mind as
15 we go forward.

16 What really is kind of the key for us, with
17 deciding that, is seeing what the market bears as far
18 as what's available. What's challenging for us is we
19 don't have specific buildings, we don't have a
20 specific requirement to go out and say, okay, for this
21 zip code how many SDVOSBs do we have.

22 So we're a little bit challenged in that
23 area so we have to kind of see what we get back. We
24 do keep that in mind, and that's why we have built
25 into that, as I mentioned earlier, kind of a focused

1 on-ramping. If we get to a point where we have no
2 veteran-owned small businesses, then maybe we need to
3 look at that and see how we could increase that.

4 And we have been working with PBS for Zone
5 1 on making sure we have a diverse pool to try and
6 meet their needs. So thank you for that comment.

7 Okay, Israel?

8 MR. ALVAREZ: Isreal Alvarez, Multi Air
9 Services.

10 You said that you were awarding forty
11 contracts. Do you have like a percentage of the
12 socioeconomic groups? And also at the task order
13 level can the contracting officer issue sole source 8A
14 or service-disabled contracts?

15 MS. SCHWEER: So Isreal Alvarez from Multi
16 Air Services.

17 The first question was, I mentioned forty
18 awards earlier. We were shooting for around forty
19 small business awards in Zone 1; I do not know what
20 the numbers will be for the other zones. Do we have
21 percentages that we have in mind for each of the
22 subcategories? And no, because we really were not
23 sure what we would get for proposals from whom.
24 That's why built into the evaluation factors is we
25 give extra credit for companies that do meet some of

1 those socioeconomic criteria, so we can try and help
2 make sure we have a diverse pool on there. So that's
3 how we tried to account for that.

4 And then the second question was at the
5 task order level can an agency do a set-aside for the
6 other ones, do a sole source for 8A. Why don't I
7 check on the 8A because we know there's very specific
8 rules SBA has on 8A. I know normally, I think, open
9 market they can sole source something, there's dollar
10 values involved.

11 But as far as the other socioeconomic
12 categories, yes, a task order contracting officer
13 could decide there's five veteran-owned small
14 businesses here that can do HVAC services, I'll set
15 this aside for service-disabled veteran-owned small
16 business, and then the fair opportunity will be
17 limited those five contractors, and it would go out to
18 all of them.

19 Does that answer the question? Except for
20 the 8A part and the sole source part. We'll get back
21 to you on that one.

22 MS. SNODDERLY: Other questions? We have
23 about ten minutes left.

24 MS. SCHWEER: And I've got a little bit of
25 voice left.

1 MS. SNODDERLY: And she's got the weekend
2 to get the voice back so we can go next week.

3 I'm not seeing any other questions. I
4 would like to take the opportunity to say thank you
5 for coming. And I know Teresa wants some wrap-up
6 comments as well, but I think the feedback was great,
7 this was what we really, really needed. So I'm going
8 to ask Teresa to do any closing comments.

9 MS. MCCARTHY: One thing I failed to do
10 miserably was announce our Small Business Utilization
11 coordinator. If you could stand up, please, Chastity.
12 Chastity Ash is here, and if you are a small business
13 and you would like to at least give her contact
14 information, I would encourage you to do that.

15 Very complex, a lot of stuff was gone over
16 today, and I do want to thank my team. We have left a
17 good chunk of the team home, and that's in order to
18 get the Zone 1 out as soon as possible. We do have
19 some great questions; some of the things we owe some
20 answers to and we'll get back to you via the website.

21 And if we don't clarify it well enough, get back to
22 us, and we'll do a little better job on that.

23 But I want to thank everybody. We really
24 need you, can't survive, obviously, without you. And
25 I want to wish you a very fine day and the best of

1 luck. So thank you very much.

2 (Whereupon, at 11:52 a.m., the industry day
3 meeting in the above-entitled matter concluded.)

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REPORTER'S CERTIFICATE

DOCKET NO.: None
CASE TITLE: Building Maintenance & Operation
Services (BMO) Industry Day
HEARING DATE: January 21, 2016
LOCATION: Atlanta, Georgia

I hereby certify that the proceedings and evidence are contained fully and accurately on the tapes and notes reported by me at the hearing in the above case before the General Services Administration, Federal Acquisition Service.

Date: February 1, 2016

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