

IN RE: GSA BMO INDUSTRY DAY PHILADELPHIA

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8:30 a.m.

REPORTER: Vicki Nunan, Notary Public

1 MARY SNODDERLY: Good morning, everybody. I
2 don't know if our mic is working or not. But we'll
3 talk loud, if not. I just want to tell everybody
4 we're gonna give it a few more minutes to make sure
5 everybody gets into the building. We'll have plenty
6 of time this morning to get through the materials, so
7 just kind of -- we'll get started here in just a few
8 minutes.

9 Good morning, everybody. That sounds better,
10 doesn't it? We got the volume turned up. Okay. We
11 may have a few stragglers come in, but we're gonna go
12 ahead and get started. My name is Mary Snodderly.
13 I'm going to be your facilitator this morning as we go
14 through this. We have quite a few people, and I'm
15 gonna introduce some folks to you. Right up front,
16 I'm gonna let you know we have a court reporter right
17 up front here who is going to be transcribing the
18 session for us, and we will be posting the notes and
19 everything to our Interact site. So just in case you
20 think you might miss something and for those people
21 who couldn't attend, we're going to include that, but
22 I just want you to know that there is a court
23 reporter. So when we -- and I'll remind you again.
24 But when we get to the end for the questions and the
25 answers, we are going to ask you to state your name

1 and your company so that we make sure that we get
2 everything down.

3 Okay. Before we get started, I just would
4 like to kind of introduce our GSA team real quick
5 here. I'm going to start with Eric, who's kind of in
6 the middle. If Eric would kind of wave there, he's
7 gonna be running our slides for us. Eric is our
8 project manager on the BMO team. And then over here
9 to your left, my right, we have Walter Eckbreth, who
10 is with -- and you're gonna be hearing from Walter a
11 little bit later. He is from our program management
12 office for the Federal Strategic Sourcing Initiative,
13 FSSI, and then we have Patrick Mazzei. Patrick is our
14 contract specialist. And then kind of just going down
15 the line here, we have Janet -- I started to say
16 Haynes. We have Janet Schweer. Janet just got
17 married. So if I trip over her name a little bit, my
18 apologies on that, but Janet is our manager. She is
19 over the whole BMO project. Next to her, we have
20 Josilyn Reed. Josilyn is our contracting officer.
21 And next to Josilyn, we have Mary Ruwwe. And I'll be
22 introducing Mary a little bit later, but she is our
23 Regional Commissioner from the Heartland Regional, so
24 I'll introduce Mary in just a little bit.

25 Before we get started, just kind of a few

1 things. You may have been told as you came in when
2 you go out and to your right, you'll find a cafeteria.
3 You'll also find the bathrooms. And we will be taking
4 a couple breaks 'cause we're here for about four
5 hours, so we'll try to give you some breaks. Also,
6 please, please, please put your phones on silent or
7 vibrate. There is when you go out and if you go left,
8 there's kind of a seating area, and we were told you
9 get pretty good cell reception. So if you do need to
10 take a call, if you could step out, that would be
11 great.

12 Eric, if you go to the next slide, let's just
13 for a minute here on our agenda. That's kind of hard
14 to see. Mary's going to give some opening comments
15 here in a few minutes. Walter's gonna talk about an
16 FSSI overview. And again, FSSI, Federal Strategic
17 Sourcing Initiative. We will try to define all these
18 acronyms. You know, we're the government. We love to
19 have our acronyms, so we'll try to define those as we
20 go through. Then I'm gonna get up and talk a little
21 bit about the BMO, just kind of give you a broad
22 overview. Janet then is gonna get up and talk about
23 the Small Business Strategy. And then what you're
24 here for, the main event is Josilyn getting up talking
25 about our acquisition solution and going through the

1 draft RFP. Hopefully you've had a chance to kind of
2 look through that. Then we'll talk about some next
3 steps, and then we're gonna have a question and answer
4 period.

5 Now, this is going to be kind of divided into
6 two sections. If you are -- hopefully you're aware.
7 We did send out a call for questions on our Interact
8 site. So those questions that were submitted, we're
9 going to go through those and Janet's going to talk
10 about those, and then we're gonna give you some time
11 to actually ask some open-ended questions. Now, we're
12 not gonna guarantee we can answer everything right
13 now. But if we have to research something, we will
14 definitely get it posted again to the Interact site.
15 Okay. So -- and oh, one other thing I wanted to
16 bring. Please hold your questions until the end,
17 until we get to that question and answer period.

18 So at this point, I would like to introduce
19 Mary Ruwwe. And Eric, if you wanna go along -- there
20 we go. Again, Mary is our regional commissioner.
21 She's with the Regional Commissioner for the Federal
22 Acquisition Service in the Heartland Region. Mary?

23 MARY RUWWE: Thank you. Good morning. I got
24 a chance to meet all of you a little earlier. I want
25 to say thank you for taking the time to be here today.

1 We are having three industry days; this morning, New
2 York City tomorrow and Washington DC on Thursday. We
3 told people you don't need to attend all three. You
4 can if you want, but we wanted to make it easier for
5 you to come and hear and give us your feedback based
6 on the particular time and location that meets your
7 schedule. So I think we've got I know at least about
8 45 attendees today, good turnout. We're really happy
9 with that, and we have a host of GSA folks locally
10 here in the room as well in the back. Guys, raise
11 your hands, here in the Philadelphia region. And so
12 as you know, that the GSA has about 11 regions. And
13 the Heartland Region is putting together the contract
14 vehicle, the BMO Strategic Sourcing, Strategic -- see,
15 I can't even say it -- Strategic Sourcing effort, but
16 it's for use government-wide, so that's why we're from
17 Kansas City. We're here in Philadelphia, and we
18 appreciate you guys hosting us. So again, thank you
19 for being here today.

20 I'm going to talk to you about importance of
21 strategic sourcing. It's important to the federal
22 government and the taxpayer and the critical role that
23 you all play as the industry in making it successful.
24 The -- so I just call the Federal Strategic Sourcing
25 Initiative Strategic Sourcing. Some people, you'll

1 hear them call it FSSI, so it's all the same.

2 So why is Strategic Sourcing important?

3 Well, it's important because at the end of the day, it
4 helps us generate savings and efficiencies by
5 leveraging the government buying needs as an
6 enterprise. And so in doing that, we're looking at --
7 for the BMO, we're looking at the enterprise. We're
8 doing the enterprise in zones, so we're starting off
9 with Zone One being this I'll call it this upper
10 northeastern corridor. And Strategic Sourcing is
11 important because it'll help us reduce the
12 administrative burden of thousands of procurements,
13 allowing agencies to take that time savings and focus
14 it on their respective agency missions. Strategic
15 Sourcing is important because it's really a
16 collaborative government-wide process that considers
17 their agency's organizational goals, their customer
18 needs for that particular federal asset, their program
19 requirements. It takes into consideration the current
20 market conditions, organizational goals that they have
21 and their small business goals.

22 So GSA's role in this process to ensure that
23 you all, the industry, understands the agency's needs
24 so that in turn, you can deliver the goods and
25 services in the most cost effective manner and the

1 most innovative manner possible. The success of
2 Strategic Sourcing really relies on the relationship
3 that the Federal Government, GSA has with you, so the
4 industry has been involved in this process from the
5 very beginning. The BMO team has held, I think, two
6 RFIs thus far. We had a big vendor kickoff virtually
7 earlier in the process. We had about 300 attendees
8 with that. And in all of those efforts, we've
9 identified best practices, saving solutions. And
10 ultimately, it's helped up develop this acquisition
11 strategy which at the end of the day again is designed to
12 achieve cost savings and innovation in building
13 maintenance.

14 And as you can see and hear, we can't do this
15 without industry. I mean, we rely heavily upon you.
16 And hopefully that you'll hear during the session
17 about and walk away with, this will be a tremendous
18 opportunity for you to help the Federal Government be
19 more efficient and save money for the taxpayers, so
20 isn't it appropriate? We're coming up on tax season,
21 April 15th. You see the line of folks out in the
22 front of the building waiting to get help for their
23 taxes. So when you think about Strategic Sourcing,
24 you're really thinking about, you know, efficiencies
25 and cost savings for the taxpayer.

1 talk, I do want to introduce one other person that's
2 in the room, Helena Coch. Helena, if you can kind of
3 wave or stand, there we go. Helena is with our OSBU
4 office. That is the Office of Small Business
5 Utilization within GSA. We ask Helena to be here in
6 case there's any specific questions that need to be
7 addressed. Helena will be here throughout the event,
8 and we're gonna have some breaks throughout. And then
9 maybe at the end, hopefully she has some time where
10 she can maybe stay a few minutes after it's over. And
11 if you've got any questions specifically for that
12 office, you can -- you can talk to Helena.

13 Okay. Without further ado, I'm going to
14 actually introduce Walter Eckbreth. Walter is, again,
15 with our FSSI. I always put too many S's in there,
16 I'm afraid. FSSI Program Management Office, and he's
17 gonna be talking about an overview of just the whole
18 FSSI program. Take it away.

19 WALTER ECKBRETH: Thanks, Mary. So let me
20 start off -- and I've got I think there's five or six
21 slides, something like that. I don't -- I don't read
22 from my slides. I don't -- I'll say I don't have them
23 memorized, but I do, kind of, sort of. So let me --
24 let me explain to you. I think there's a lot of
25 misinformation out there about what Federal Strategic

1 Sourcing Initiative is or what Strategic Sourcing is.
2 There's this all too common belief that Strategic
3 Sourcing is all about limiting the number of vendors
4 and creating these contracts and very, very small
5 contracts. And really, what, what Strategic Sourcing
6 is is looking at how the government buys and trying to
7 identify what decisions we make that add to our cost
8 of buying. Are our specifications too restrictive or,
9 or do we require too much of contractors? So in the
10 building maintenance space, you know, the hours that
11 we require trash pickup. You know, if we have a
12 janitorial contract and we only allow the janitors to
13 come in in the off hours, well, we know that that adds
14 to our cost, or grounds maintenance. Some of the
15 requirements that we may have to, to, to, to keep the
16 grass cut even when the grass isn't growing, those
17 kinds of things that we -- this is where Strategic
18 Sourcing is taking us is actually having a sit down
19 and taking a good, hard look at how we buy, what
20 decisions we make and how those decisions impact cost.

21 Now, sometimes we don't have any choice in
22 decisions. Sometimes Congress has given us
23 regulations or laws that we have to follow, and those
24 regulations or laws may drive up our cost, but we
25 don't really have much choice in that short of working

1 through the legislative process, and that doesn't move
2 fast. But where industry comes in and is very
3 important in this, this is -- this is a very open and
4 collaborative process. We've, we've stood up the
5 Interact site, and we've been managing that for well
6 over a year now where we've shared bits of information
7 with you all and ask you all questions. And what
8 we're trying to find out is we're trying to get a
9 sanity check and get your input on what we need to do
10 better. And through each one of these Strategic
11 Sourcing Initiative procurements that we do, whether
12 it's we actually do a set of contracts or we change
13 some of our buying behaviors, we're seeking the help
14 of industry to tell us what we're doing wrong and how
15 we can do things better.

16 So, you know, I want to thank you all for
17 coming today. This is a important milestone for us.
18 You know, we, we -- a year ago when we did the kickoff
19 meeting with industry, did the virtual kickoff, I was
20 actually one of the people manning the -- manning the
21 question and answer booth back in Washington, and we
22 had really great engagement, and it's so good to see
23 people here in person. So, you know, I kind of run
24 through this.

25 Strategic Sourcing, it's about you helping us

1 to build better procurements. There are some
2 benchmarks that we do have to have as we go into each
3 one. If we're gonna start a procurement, we have to
4 benchmark what the procurement environment is, what
5 the socioeconomic usage is, how much business goes to
6 small business, how much goes to service-disabled
7 veteran-owned small business, to each of the
8 subcategories. And then if we're gonna do an
9 acquisition solution, we have to look and see, create
10 a solution that helps us maintain those or improve
11 those. So if we're doing 50 percent of the business
12 with small business, if we're creating a new
13 acquisition vehicle, we need to try and create it so
14 that at least 50 percent of the business, we have a
15 shot to get there or do better at that at the
16 socioeconomic. You know, it's, it's not about driving
17 prices down. It's about helping us get to the right
18 value for the government.

19 There's, there's a lot of questions sometimes
20 that we're always aiming for the low cost. If you're
21 talking simple commodities, office supplies where you
22 have hundreds or thousands of vendors who sell the
23 exact same catalog of 70,000 items; they all sell the
24 exact same pen. They all sell the exact same tablet
25 of paper. The value in there, the value add that a

1 vendor brings is much lower than if we're doing
2 professional services. You know, think about if
3 you're going for a doctor. Are you gonna go for the
4 lowest price doctor you can get? Probably not.
5 You're probably gonna find somebody with a level of
6 expertise that goes with whatever your health concern
7 is, whether it's a serious health concern or you just
8 you need a check up, and that's the same thing with
9 this.

10 So, you know, as we're looking at building
11 maintenance services, we understand there's, there's
12 markets that we need to work in. There are labor,
13 labor rates that we have to work with. There's
14 different service requirements at different facilities
15 and, and, you know, you figure out that the janitorial
16 work that would be done at a VA hospital versus in an
17 office building versus on a campus. Each one of those
18 is different, but we're looking for the same level
19 of -- a level of service appropriate for each one. So
20 let's go to next slide.

21 So back in 2005, President George W. Bush set
22 up the Federal Strategic Sourcing Initiative. He
23 issued an executive order standing this up, and, and
24 we started down the path of creating several different
25 solutions. There was an initial solution for office

1 supplies. There was a solution for domestic delivery
2 small package service. Think of UPS or FedEx, and
3 there were a couple of other different ones that were
4 tried. And basically, this was an attempt to have
5 groups of agencies come together who had common needs
6 and identify a common groundwork that they would need
7 to get -- to get a contract in place that all could
8 use that would benefit the government, kind of reduce
9 our, our, our acquisition costs. Instead of having
10 every office go out and do their own contract, we'll
11 set up a group of them that everybody can buy from.

12 And through the first generation of
13 solutions, one of the things that became apparent to
14 everybody was -- and it was a thing that was missing
15 in the first generation -- was data. We weren't
16 capturing data on how the government was using the
17 solutions and what value we were getting. And so with
18 that, as we moved into -- as the first generation
19 started to expire and we move into the second
20 generations, there was a second executive order that
21 was signed at that point by President Obama that
22 started to add some concepts for operation. And then
23 there was a third one in 2012 which further solidified
24 the concepts of operation.

25 But basically what the Federal Strategic

1 Sourcing Initiative procurement is looking for,
2 they're looking to create a vehicle. If it's an
3 acquisition, it's gotta save the government money.
4 It's gotta enable socioeconomic growth. It's gotta
5 have data. It's gotta have intense management. You
6 know, we don't -- just can't put contracts in place
7 and walk away. We need to intensely manage them to
8 make sure the contracts are still good. The whole
9 process, though, is, is coming in and making sure that
10 we set up a vehicle that works and works well. And as
11 we started to collect the data, the data has helped
12 shape how we build procurements.

13 So as I mentioned, one of the first
14 generation solutions that we did was small package
15 delivery. Traditionally, you think of FedEx. And so
16 as we, we got through and going into the second
17 generation solutions and trying to figure out how the
18 government is buying wrong and what we can do better
19 in a new procurement, the team started looking at
20 where we were getting charges, and the domestic
21 delivery contract was one where we were getting pretty
22 good data, and what they started looking at was all of
23 the excess oil charges that the government was taking
24 on. So every time we filled out a handbill and we
25 filled them out in paper and it was a triplicate form

1 or a quadruplicate form and the copy that FedEx took
2 was always the bottom copy and so the writing on that
3 was always faint, and so the government got charged
4 every time FedEx had to call somebody to find out
5 where do I deliver it or if we gave them a bad address
6 of if we gave them a bad phone number at the location.

7 And so we started accruing all these charges,
8 and the team realized early on that for the next
9 generation, we've gotta find a way to minimize these
10 excess oil charges. Part of it is training our
11 government employees on that this is a problem.
12 Another part is working into the new contract is there
13 a way that we can get out of having these five part
14 forms that we had, and the solution was each -- you
15 know, each of the providers, they did have an online
16 tracking system. They had an online ordering system
17 that we could start to use, and so we put that as a
18 requirement in there.

19 One of the other things that the team started
20 looking at was the shipping profile. And so we would
21 have people that without thinking of it sitting in
22 this federal office building here in Philadelphia
23 decide that they need to send a package overnight to
24 an office in New York City, and they would check that
25 they would need an overnight air, morning pick up.

1 Well, to go from Philadelphia to New York, it actually
2 doesn't need to get on a plane to go there and make it
3 overnight. It can go on a truck. We had people in
4 Washington DC who you'd be in one federal building in
5 Washington DC and they would check overnight air to
6 another federal building in Washington DC or in the
7 suburbs. Again, it didn't have to go on a plane. But
8 because we checked that box, we got charged that
9 additional fee. So here again, it's a training -- a
10 training piece for the government to understand what
11 our shipping profile is.

12 So it's things like this, starting to
13 understand how we buy and where we're adding our cost
14 that we started to track some of this data and where
15 we see -- you know, there was a lot of push back on
16 data, but this is where data is very important to us.
17 And we'll talk a little later in the procurement about
18 some of the data that we're asking for, and this is
19 where we need help from industry. What data is
20 available? What data will help us make the right
21 purchasing decisions that will help us manage
22 buildings and facilities better? Next slide.

23 So the Strategic Sourcing process -- and this
24 comes about with the 2012 -- we actually have this
25 process set up that the Office of Management and

1 Budget every year will take a look at what the
2 government buys. They look at big pots of money and
3 look at big pots of spend, and they try and get down
4 to looking a pots where a lot of agencies are buying
5 the same kind of stuff. Every agency buys office
6 supplies. Every agency has small package delivery
7 needs. Some agencies need print management services.
8 Most do, but not all. Everybody buys computers.
9 There's a lot of agencies that have building
10 management needs. Now, this is one that's not every
11 agency does, but there's several large landlords for
12 the government that do the brunt of the work, but it's
13 a broad enough spectrum.

14 And so there's a process that's been set up
15 that OMB starts by identifying these pots of spend and
16 does a sanity check. They start to convene a lead
17 agency to work with a group of other agencies to
18 identify is this something that the entire government
19 buys or a large number of agencies buy? Do we all buy
20 the same thing and have similar needs, and are those
21 needs similar enough that we could create a new
22 solution and, you know, working through a demand
23 management strategy to help us buy better or is there
24 an acquisition solution that's, that's, that's needed.
25 And if that group meets and decides that yes, there's,

1 there's enough need across a number of agencies, we'll
2 convene a commodity team made up of a number of
3 agencies and we'll start to get down into
4 understanding the spend in that category. And once we
5 do that, we identify that there is an opportunity for
6 the government to save money, we'll have a key
7 decision point where we'll go back before the Office
8 of Management and Budget before the Strategic Sourcing
9 Leadership Committee which is set up of chief
10 acquisition officers, and we'll, we'll present them
11 the information and say should we go forward and
12 create a Strategic Sourcing Initiative procurement or
13 a solution here?

14 Once a group is set up, then the commodity
15 team comes together. This is the group of agencies
16 that send representatives. Sometimes, it's a
17 strategic sourcing person. Sometimes, it's a
18 commodity specialist. Sometimes, it's a procurement
19 person, and they come together and they identify how,
20 how their agencies buy these products or services,
21 where there are opportunities. We start to engage
22 industry and ask you all what are we doing wrong?
23 When we buy this, what do we do that drives up cost
24 and what can we do to improve that? So we start to
25 work through and identify some different ways that we

1 can save money. And, you know, once we -- once we go
2 through this discovery process and we have a plan in
3 how we want to go forward, we then go again before OMB
4 for a second key decision point. And this is the one
5 where we say okay, here's all the information that
6 we've gathered. Here's where we see the opportunity
7 for spend if we take this path. And we get them to
8 agree that yes, that's the right path. We ask
9 agencies to all join in together and participate, and
10 then we go and create the solution, whatever the
11 solution might be.

12 Once it's in place and we start -- we change
13 behavior. We create a new procurement and agencies
14 start using it. We then have to demonstrate that what
15 we've done actually makes a difference, makes a
16 positive difference, helps cuts the cost. And so once
17 we've done that, we go back before OMB and say here's
18 the solution. It's in place. Here's the agencies who
19 have been using it. Here's the benefit that they've
20 gotten from it. And from that point, there's another
21 vote, another key decision, and that's when we get the
22 mythical Federal Strategic Sourcing Initiative
23 branding. But the key there is that really helps
24 agencies to identify here is an opportunity for the
25 government to save, and here's a process in which I

1 can save. Let me go to the next slide.

2 So I talked a little bit about this, the
3 structure of the Federal Strategic Sourcing
4 Initiative. There's a governing structure, and we
5 always have to have a governance structure for
6 anything, whether it's a club or a federal
7 organization. So in the governance structure, it
8 falls under the Office of Management and Budget, so
9 under the Executive Office of the President. There's an
10 oversight program management office that is housed within
11 GSA. That's where I work. And basically what we do, we
12 provide the administrative support and oversight to help
13 teams line up all these solutions to help provide support
14 to, to, to, to Mary and her team. Execution is done by
15 teams like this. Sometimes, they're out of GSA leading
16 the team. Sometimes, there are other agencies that lead
17 these teams that work across commodity teams. And then
18 there's the enablement and champion, which is we have
19 agencies on the teams, and those agencies are the support,
20 the champions for this. So as we move forward with
21 building maintenance services, you know, you'll,
22 you'll see agencies that are all supporting that are
23 gonna make commitments to use this procurement and
24 support it.

25 This is the part I like talking about. You

1 know, I said Federal Strategic Sourcing Initiative is
2 not always about buying cheaply and driving down the
3 price. There's a lot of different, different levers
4 in there. You know, we do look at pricing
5 differences, but we can look at those based upon how
6 we're buying. As I said, if we change our specs, our
7 requirements -- you know, we don't ask for things that
8 we don't need. If I don't need that box of pens
9 delivered to my desk the next morning, if you can just
10 ship it overnight, you know, can ship overnight or
11 ship third day for my box of pens, I can save money on
12 that. I'll still get pens. There's no additional cost on
13 the vendor. In fact, it saves the vendor money, and that
14 passed on to -- that gets passed on to us as saved
15 cost.

16 One of the great levers that we've used a lot
17 of is demand management. The building maintenance
18 team, one of the first things that they did when they
19 stood up that commodity team, the commodity team
20 identified a series of behaviors they could take to
21 help reduce their cost. Some of it was going back to
22 old executive orders that had made some changes or put
23 some requirements on the government to change
24 behavior, but nobody was really tracking what was
25 being done. For example, energy, reducing energy

1 consumption in a federal building by having the
2 computers in the building shut off at a certain time
3 so people didn't leave the -- leave the computers on
4 overnight. There was already an executive order that
5 did that, but it was kind of probably hit or miss as
6 far as how agencies used it. But the commodity team
7 got together and said this is something good, let's
8 remind agencies to do it.

9 They also identified that there were some
10 other opportunity in doing building retrofits. If we
11 do building retrofits to put in motion sensor lights
12 or have timer lights so that lights shut off in the
13 middle of the night when people aren't in the building
14 or shut off when people aren't in the facility even
15 during the daytime, there's an opportunity to save
16 energy. Again, this doesn't -- this isn't a
17 procurement. This is a behavioral change for the
18 government. Now, it may take a procurement to enable
19 some of these, but this isn't a change to any
20 procurement. It doesn't drive down pricing. These are
21 the kinds of demand management changes that we see that
22 are really positive.

23 Our print management solution that we stood
24 up four years ago, one of the first pieces there was a
25 similar demand management. We were able to identify

1 with industry's help that the government could save
2 money on printing by novel ideas of instead of doing
3 color printing, print in black and white. Print on
4 two sides of the paper. There's certain fonts that
5 use a lot of toner. By changing font, you can -- we
6 could reduce toner usage. Printing in draft mode also
7 reduces, and one of the biggest ones was don't have
8 those little personal printers that people have at
9 home. They're cheap and easy for the government to
10 buy. But as you know with your own home printers, you
11 buy the printer for \$100. And by the third toner
12 cartridge, you've brought that printer again and you
13 keep buying it, so there were opportunities to look at the
14 total cost of how we buy.

15 Again, this didn't require a new procurement.
16 This was reminding agencies of here's some good
17 behaviors that you can have that are gonna change
18 your, your cost that are gonna save your money. Now,
19 we do also have procurement changes. We -- you know,
20 if we can create some larger contracts that work with
21 a larger group of agencies, it can reduce their
22 administrative cost and efficiencies because they're
23 able to just place orders against contracts as opposed
24 to having to go out and do new contracts. And from
25 the contractor perspective, it hopefully reduces your

1 bid proposal costs of having to go out and do bid and
2 proposal for the same little thing over and over
3 again. So there's a lot of opportunities there that
4 we use it to save money. I think that pretty well
5 does it.

6 And so the key -- I've talked about this a
7 lot -- small business participation. Again, one of
8 the key things of the Federal Strategic Sourcing
9 Initiative is making sure that we still maintain
10 socioeconomic benchmarks that we've already done and
11 keep those same, same levels of support. So there was
12 an OMB memo issued in December 2012, and this is again
13 saying if we're gonna do a procurement, we need to
14 benchmark what the socioeconomic was, how many -- the
15 dollars, the percent of dollars that are going to each
16 socioeconomic subcategory. And if we're gonna create
17 a solution, we have to create a solution that's gonna
18 help meet those or exceed those same goals. And
19 again -- and this is where we need industry help as
20 we're going through this. You know, Josilyn will talk
21 about the procurement and will walk you through it.
22 Make note of things that you think will hinder us,
23 something that a small business can't do or, you know,
24 service disabled veteran owned small business, things that
25 we may have in there that we may not see as being a

1 challenge. You know, we've worked with the commodity
2 team. We've worked with the agencies who buy BMO services
3 and looking at their contracts. We think we've
4 incorporated, but this is your opportunity to give us a
5 sanity check. I think that wraps up my segment.

6 MARY SNODDERLY: Thank you, Walter. Okay. I
7 forgot to make this announcement earlier. Anybody
8 looking at the clock on the wall, it is not correct,
9 if you haven't noticed that already. I think it's
10 about 15 minutes behind. I didn't want anybody to
11 look up there and think oh, boy, I've -- you know,
12 I've got plenty of time for something.

13 I'm gonna actually talk now. You've heard
14 Walter give an overview of the whole FSSI program, so
15 I'm gonna talk a little bit about BMO and kind of
16 start giving you the structure and the overview of
17 what BMO looks like and how it fits into that FSSI
18 process. Before we get started with that, quick
19 question for everybody in the audience, if you could
20 just hold up your hand. How many small businesses do
21 we have in the audience? We have quite a few. Great.
22 How many other small businesses -- businesses that are
23 other than small do we have in the audience? So we do
24 have a few large businesses as well. That's great.

25 So let's go ahead and talk a little bit about

1 the BMO overview and kind of what it's all about. You
2 heard Walter talk about the development of what we
3 call an interagency commodity team. We do have one
4 for BMO, and have the agencies listed up there. We
5 have over 18 different organizations that are part of
6 that team. That team is developing the strategy as we
7 go forward. GSA's just kind of doing the
8 implementation part of it. The team gets together and
9 talks about different things that they do within their
10 agencies, and then we try to get that -- we
11 incorporate that in as best that we can. Some of the
12 goals -- and again, like Walter, I'm not gonna
13 necessarily read through everything on the slides
14 here. Announcement, we will have the slide deck
15 posted to the Interact site, so you will have copies
16 of the slides. I forgot to make that announcement
17 earlier as well, so you will be able to obtain that.

18 You can just see some of the information that
19 we have up there. A customized solution, which I'll
20 be talking a little bit more about that, how flexible
21 that it is. Small business, there's participation
22 where both small businesses and large businesses can
23 participate in this program. So let's go ahead and go
24 to the next slide.

25 Like I said, this is a very comprehensive,

1 very flexible solution that we have out there. Now,
2 keep in mind. I mentioned that we were part of the
3 Schedules Program at one point. This particular
4 solution is going to be an open market IDIQ. I wanna
5 stress that, open market. It is not gonna go against
6 the schedule. Now, that does not mean that those of
7 you that do hold a schedule contract, you're more than
8 welcome, obviously, to put in an offer, but just
9 please know that it is not gonna go against the
10 schedule. I think a lot of the other FSSIs that are
11 out there have been BPAs against the schedule, and
12 we're kind of breaking new ground there.

13 Now, this solution's also going to allow for
14 various contracts types at the task order level. What
15 do I mean by that? We're gonna allow for firm fixed
16 price. We're gonna allow for labor house, time and
17 material, cost reimbursement. All the different
18 contract types out there are gonna be allowed at the
19 task order level. Now, for this parent contract, the
20 BMO parent contract that we are doing, we are looking
21 at a 10 to 12 year period, contract period. Now, why
22 do we say 10 to 12 years? We do have to seek a
23 deviation for that contract length, and we're still in
24 the process of doing that, so that's why up on the
25 slides it says pending, pending the FAR deviation

1 approval.

2 Now, when I said this is flexible and as we
3 start kind of talking about how this is gonna be set
4 up for you industry, please note that customer
5 agencies when they come in to order off the BMO
6 vehicle, the parent contract, they can order a single
7 service or they can order a mix of services. Now, all
8 the -- we will have some sustainable language
9 incorporated in there. I think Josilyn might talk a
10 little bit about that as we go through the draft RFP
11 as well. Let's take a look at the next slide.

12 The next slide, when I mentioned that we --
13 that customer agencies will be able to order a single
14 service or a mix of services, that's a little
15 different for the industry. You can see up here the
16 way we've got the scope outlined, we do have two
17 different service groupings. We have our Operations
18 and Maintenance, and then we have facility Support
19 Services. The top part is what we are calling
20 required services. Now, you're gonna see this chart
21 again because Josilyn's gonna go through it as well
22 when she talks about the draft RFP.

23 Now, under operations and maintenance, the
24 required services that we have will be HVAC
25 maintenance, plumbing and pipe fitting, elevator

1 maintenance and electrical maintenance. And I'm not
2 gonna read the whole optional services, but you can
3 see there's a whole host of optional services that can
4 be offered as well. Under the facility support
5 services, the required services will be janitorial and
6 then landscaping or grounds maintenance. And again,
7 we have some optional services under that as well.

8 Now, how did we come up with this list of
9 services in these two different groupings? Remember
10 the commodity team that I talked about? That's how we
11 came up with it. It was a decision, and it was
12 determined that these were the services that were most
13 frequently ordered kind of together, and this is why
14 we came up with the grouping that we did. Also, small
15 business consideration had us breaking it out into two
16 groupings. Like I said, Josilyn's gonna cover this in
17 a little more depth when she talks about the RFP, so
18 let's go to the next slide.

19 Now, we are taking a zonal approach, and
20 hopefully everybody is understanding that. This why
21 we are doing the industry days here today, New York
22 tomorrow and Washington DC on Thursday. We are
23 looking at Zone One which covers Delaware, Maryland,
24 New Jersey, New York, Virginia, West Virginia, and
25 Washington DC. Oh, Pennsylvania. I knew I was

1 leaving one out there. Pennsylvania, duh. We're in
2 Pennsylvania, right? So that is the Zone One that we
3 are looking at.

4 Now, what does that mean? That means that
5 yeah, we are gonna probably create other zones. We
6 are actually looking at that, but we have not got them
7 defined or exactly when we're gonna roll them out, but
8 we wanted to start. So the initial award that we're
9 gonna be talking about is for this Zone One. Now,
10 just kind of give you some facts and figures, and
11 you're gonna see up there in my third bullet which
12 says that we have identified that there is \$1.5
13 billion in addressable spend in Zone One. Now, I know
14 many of you familiar with Ability One or Source
15 America. That is minus the Source America spend in
16 what we are terming as addressable. When we looked at
17 this whole market of BMO, it included utilities. We
18 pulled that out, so this is looking at what we feel
19 really falls under the scope of the BMO vehicle.

20 Now, other things that we've done, we've also
21 in conjunction with why did we come up with the Zone
22 One, same thing. The commodity team came in and
23 helped us. So as far as the scope, the previous slide
24 I did and this slide, we've got input from our
25 commodity team, our interagency commodity team that's

1 out there. And we've also posted -- and I think Mary
2 mentioned that or Walter mentioned. We have posted a
3 couple of RFIs over the past year or so, and we were
4 asking for information. Also, you keep hearing me
5 mention Interact. We post a whole host of questions
6 to that Interact site. And so we are looking for
7 feedback, and that is why we are posting it to
8 Interact. And if you don't have that, we'll make sure
9 that you have that site. Please make sure you're a
10 member of that site and feel free to post. If you
11 don't wanna post your answer out there -- it is public
12 for everyone to see -- you can email it in to our BMO
13 address. I know we will have that coming up towards
14 the end.

15 Okay. With that said, I'm gonna actually now
16 turn it over to Janet Schweer, and she's gonna talk
17 about some small business strategy.

18 JANET SCHWEER: I think I'm gonna be
19 repeating a lot of what Walter was saying. We'll
20 emphasize it more here. I can't get much closer than
21 this. Can you hear me now? I'll just stand like
22 this.

23 As Walter mentioned, there was an Office of
24 Management and Budget -- sorry, memo from December
25 2012 on improving acquisition through strategic

1 sourcing, and that memo outlined the goal of meeting
2 or increasing the small business participation per
3 spend through strategic sourcing. So the government,
4 as we all know, has specific goals for small business
5 spend percentage. We have to report on that. Every
6 agency has their own goals, so, you know, OMB is very
7 mindful of that when they're rolling out the Strategic
8 Sourcing Initiative. As Walter said, the exact
9 language says to the maximum extent practical, all
10 strategic sourcing opportunities shall seek to
11 increase participation by small business. Part of
12 that -- for part of our process is we had to start
13 with market research. We had to come up with a
14 baseline of what the current small business
15 participation is for the BMO services.

16 We looked at FY '13 spend, which is the most
17 recent available at the time. Mary just mentioned
18 that there is \$1.5 billion in addressable spend in
19 Zone One, so we had to look and see how much of that
20 is currently going to small businesses. Again, that's
21 within the scope of the BMO services, the specific
22 services that we're targeting with this vehicle that
23 was spent by the federal agencies. When we looked at
24 that data, over half of it was going to small
25 businesses currently. Now, that could be one contract

1 here for HVAC services only, one contract here for
2 landscaping services only. That's just an aggregate
3 number of the spend, but it provides us with a
4 baseline of what we should be looking at for our
5 vehicle in terms of meeting or increasing the small
6 business participation.

7 As Mary mentioned, we have been reaching out
8 to industry through our Interact site. One of the
9 questions we got from the commodity team on this was,
10 you know, we're trying to increase opportunities for
11 small business. We had to look at our zone size to
12 make sure that it was a size that small businesses
13 could cover. We didn't wanna make it -- you know,
14 there's a reason it's not a nationwide solution coming
15 out the box. It's because we had to make it so we're
16 facilitating small business participation, and that's
17 why we have the zone the size that it is. We had to
18 make sure that we had small businesses in that area
19 that could cover that zone. And again, we had
20 reported feedback from RFIs and through Interact that
21 told us that small businesses could do that, so that's
22 why we go with the zonal structure. And as Mary
23 mentioned, we will be coming out with additional
24 zones. We don't have those defined at this time, but
25 each zone will have tailored small business goals and

1 its own baseline because we will have different spend,
2 addressable spend in each area depending on how we're
3 defining that zone.

4 As with any government procurement vehicle,
5 we have our regulations, so any other than small
6 businesses would be required to have subcontracting --
7 small business subcontracting plans as part of the
8 vehicle. Small businesses would not be required to
9 submit a plan, but that will be a requirement for any
10 other than small business participating, and most of
11 you are probably used to that, already have a plan,
12 probably maybe several plans depending on your
13 contracts in place.

14 A question that we get quite a bit is about
15 set-asides. Josilyn's going to be talking about the
16 two different parent contract groups that we'll be
17 having. We'll have unrestricted and then small
18 businesses. Within each one of those, customer
19 agencies would be able to set aside task orders for
20 small businesses assuming there is adequate
21 competition. So as Walter mentioned, there are going
22 to be various socioeconomic groups in both of those
23 pools or both of those parent contracts. So provided
24 there's enough service disabled veteran owned small
25 businesses in either pool, agencies can still set

1 aside task orders. They will still have to follow all
2 regulations, all of their internal policies of, you
3 know, different thresholds at which they set aside
4 orders for different small businesses. Those will
5 still be in place. That's the end of mine. Do you
6 want to take a break?

7 MARY SNODDERLY: Okay. Next on the agenda is
8 going to be the acquisition solution. And obviously,
9 Josilyn has a lot to say. So why don't we take about
10 a 10 minute break, and then we'll come back and we'll
11 really get into the meat of the draft RFP. Thanks.

12 (A short break was held.)

13 MARY SNODDERLY: If anybody is standing up in
14 the back, we do have some seats up front here. It's
15 kind of like church. Nobody wants to sit up in the
16 front pew, right? Okay. Welcome back.

17 And a lot of people have actually asked me
18 this question, so I am gonna answer. Yes, our whole
19 BMO team -- with the exception of Walter, we are all
20 from Kansas City, Missouri. So we flew up here just
21 to be with you all, and then we are taking the train
22 this afternoon going to New York, and we're gonna do
23 another session in New York and we're gonna take the
24 train and then go to DC, Washington, DC and do the
25 same from there. I may have stated that earlier. But

1 yeah, we are actually all in Kansas City, Missouri, so
2 we're Midwest born and bred here.

3 So let's go ahead and get started because I'm
4 sure this is what everybody came for. I want to
5 introduce Josilyn Reed. She is our senior contracting
6 officer, and she's gonna actually go through a lot of
7 the highlights of the draft RFP that is posted out
8 there. So Josilyn?

9 JOSILYN REED: Thanks, Mary. Okay.

10 So again, like Mary said, we were -- for the
11 acquisition solution, we're going to go through
12 briefly each section of the draft RFP and we're just
13 gonna highlight some of the most important contents of
14 the draft RFP. Due to the limited time, we won't have
15 time to address every element of the draft RFP, but we
16 will cover some of the most important content. And so
17 if you do have a question on the draft RFP or a
18 section that we didn't cover, we ask that you please
19 make a note of that, jot that down, and we will cover
20 that towards the end when we have our question and
21 answer sessions. As Mary mentioned earlier, towards
22 the end of the presentation, we will go through
23 question and answers so you will get an opportunity.
24 If you've already submitted your questions, we'll go
25 through those questions. And if you have new

1 questions or comments, we'll get an opportunity to
2 address those at that time, so we ask that you hold
3 your questions until the end of the presentation.

4 So moving right along into the acquisition
5 solution. We did post a draft RFP. It was released
6 on the FedBizOps website on March 19th, and it will be
7 closing on April 17th. Again, this is a draft RFP,
8 and the purpose for this draft is, as you heard before
9 as you heard Walter mention, we want this to be a
10 collaborative effort. We want to hear from industry.
11 We want to know is this -- you know, are we correct in
12 these areas? Is there something we can be doing
13 better? So we want you feedback. So if there's any
14 section or any information that you want to provide us
15 regarding the draft RFP, please do that. We ask that
16 all responses be given to us by the closing date,
17 which will be April 17th. And then if you actually
18 click on the draft RFP, you'll see we've given some
19 guidance on how we're looking for that information,
20 just corresponding to the correct section and things
21 of that nature.

22 So as you heard Janet mention earlier, we
23 will have two final RFPs. So we'll have 100 percent
24 total small business set aside, and then we will have
25 another RFP that will be an unrestricted. So the, the

1 two different RFPs, they will be very similar in
2 scope, meaning some -- the same service requirements,
3 some of the general requirements, and then they may
4 vary based on the evaluation criteria and things of
5 that nature because we understand that small
6 businesses tackle things differently than the
7 unrestricted, so we definitely want feedback in those
8 areas as well.

9 So what I'm gonna do is I'm gonna go through
10 each section of the RFP as it's stated in the draft
11 RFP. So the first section is Section A. This is
12 pretty standard. If you guys have done government
13 work, you're very familiar with. This will be the
14 form that we're using, the standard Form 33 that we'll
15 be using for the BMO vehicle. Next slide.

16 Section B. Section B will discuss a lot of
17 the background information of the acquisition. It
18 will include like a general overview of FSSI, which
19 you guys have heard a little bit about that earlier.
20 We talk about the background of BMO. And as you --
21 Mary has given us earlier, and then we talk about
22 other things such as the authorities used, et cetera.

23 So we talked a little bit about the contract
24 type. This will be a government-wide acquisition. It
25 will be a multiple award, indefinite delivery,

1 indefinite quantity contract vehicle, so it'll be a
2 family of awardees for the multiple award IDIQ type
3 contract. This contract will allow the flexibility,
4 as Mary stated earlier, for task orders to have
5 varying contract types. So we understand that our
6 agencies don't just place firm fix orders, firm fix
7 price task order types, so we want to have the
8 flexibility where agencies can select their contract
9 type. There might even be a combination of contract
10 types per each vehicle, meaning that there might be a
11 separate contract line item for one type and might
12 include another, like a labor hour component to that
13 firm fix price component. So we understand that, that
14 agencies have needs for the varying types of
15 contracts, and so this contract will allow for the
16 task orders to be -- have multiple types of contracts.

17 And there is a minimum guarantee on this
18 contract of \$2,500, and there is no maximum ceiling
19 for this. We want to -- this is another area that
20 we're really looking for feedback from, so we want to
21 know -- we're looking for feedback regarding like
22 minimum order averages. We want to know is this
23 minimum guarantee, is this something that you're
24 seeing, that you're normally doing. We just kind of
25 want to know if this is something that is -- industry

1 is seeing and that this is acceptable, so we would
2 like -- definitely like to get some feedback on that.

3 Section B also references the, the labor
4 categories and the standard occupational
5 classifications. Under this vehicle, we are asking
6 that the labor categories come in in a standardized
7 form. So we have created a standardized list of labor
8 categories, and that is an attachment that you will
9 find in the draft RFP. This standardized labor
10 categories, it will correspond to the Office of
11 Management Budget -- and I'll say OMB from here on,
12 and the Standard Occupation Classification System,
13 SOCS. So they're gonna be labor categories that are
14 either in individual labor categories such as janitors
15 laborers, things of that nature that can be mapped to
16 a single SOC function or a labor category that will be
17 matched to groups. So it could be under, like, your
18 management group or varying groups, so there's a
19 complete list.

20 We've separated it out. These labor
21 categories, we understand that this is a service
22 contract, so we've identified the labor category. We
23 have identified the definition of that labor category
24 and then we've corresponded that to the service
25 contract actual code that, that, that will apply to

1 that labor category. So that's been mapped up front,
2 and we want industry to get familiar with this process
3 because when they're placing task orders, everything
4 will correlate back to the standardized labor
5 categories.

6 Next slide. Now, moving on to Section C.
7 Section C will be the section you will probably refer
8 to often. This section will give you the description.
9 It talks about the specification and most importantly,
10 the performance-based statement of work. So Section
11 C -- again, you will be referring to this back and
12 forth, and you'll hear me say Section C, Section C,
13 Section C. And again, it goes back to the
14 requirements and the performance based statement of
15 work.

16 So just a general backgrounds of Section C.
17 Again, this is a comprehensive solution. It's gonna
18 cross multiple service categories. And as Mary
19 mentioned earlier, it will be -- agencies will have
20 the opportunity to order single services or a
21 multitude of services. We want this to be a complete,
22 all-inclusive type vehicle where there will be
23 flexibility to do, you know, individual services as
24 well as multiple services.

25 For the period of performance, again I know

1 Mary mentioned this earlier, so I'll just briefly
2 cover it. We are seeking for a period of performance
3 that is intended to be a 10 to 12 year term. That is
4 base including options, and it is for the parent
5 contract, so understand that task orders will have
6 their own regulations as far as how long their term
7 can go, so their, their, their term will be basically
8 based on their agency's policies. So it could be your
9 general, what you usually see, your five year term or
10 sometimes agencies can go for longer terms, so the 10
11 to 12 year will just be for the parent contract.

12 The scope and requirements. We talked about
13 this a little earlier, but this is for Zone One, so
14 all the services and everything provided will be under
15 the Zone One area. So coverage, industry will have to
16 be able to provide coverage for the entire area of
17 Zone One. And later when we talk about the evaluation
18 factors, we'll get into how we're going to look into
19 getting that information and ensuring that the
20 coverage can be provided for the entire area of Zone
21 One.

22 Talking about the performance objectives.
23 Mary mentioned this earlier, but we have two separate
24 service groups, so you'll hear us refer service group,
25 service groups, and the two separate service groups

1 are defined as Operations and maintenance and Facility
2 support Services. And there's a list of services that
3 you saw a little earlier, and each service -- each
4 service group has a list of services that are required
5 and services that are optional. So the required
6 services, now these are the required services that
7 industry will have to provide, so it's not -- on the
8 task order basis, customers can -- they don't have to
9 require these services. It can again be the
10 individual services or it can be the multitude of
11 services. But on the base contract, the industry will
12 have to provide all of the services that are required,
13 and then they can also provide services that are
14 optional, so we'll go to the diagram again on the next
15 slide.

16 Again, I know Mary talked about this earlier,
17 but I just wanna kind of highlight this 'cause you'll
18 see this a lot and you'll hear this a lot, so we just
19 kind of wanna make sure that it's understood. So we
20 have the two service groups. Again, Operations and
21 Maintenance and the Facilities Support. So under the
22 Operations and Maintenance, we've identified the
23 required services under here. So you have your HVAC
24 maintenance, your plumbing and pipe fitting, your
25 elevator maintenance, your electrical maintenance, and

1 then the optional services as Mary mentioned earlier
2 again. So as you see, you have your fire alarm system
3 maintenance, your fire suppression water based system,
4 preventative maintenance, roofing services, building
5 management services, architectural and framework
6 building maintenance services, commissioning services,
7 elevator inspection services, and we've also put the
8 services that fall under the facility support, it is
9 an optional service under the Operations and
10 Maintenance. We wanted to be able to, again, offer
11 that complete solution, so this kind of covers the
12 whole ram of your complete facilities maintenance
13 under one service group.

14 However, we understand that services are
15 broken out, and so that's why we have the separate
16 Facility Support Services. So those cover -- your
17 required services are your janitorial services, your
18 landscaping and grounds maintenance and your optional
19 services cover your cemetery maintenance, your pest
20 control, your waste management and recycling services.
21 All these services had been identified. They have a
22 full definition description of all the subservices
23 that fall under that category, and understand that
24 most of -- we try to capture most of the services that
25 fall under that. We've sent this out through an RFI.

1 We've gotten feedback from industry as well as our
2 commodity team.

3 So just note that in each service category,
4 it says services include, but not limited to. So
5 there could be a service that falls under, let's say,
6 HVAC maintenance that we didn't mention in the
7 definition. That doesn't mean it necessarily is not
8 included in that scope. So at the task order level,
9 it can be defined and it could potentially be in the
10 scope of that service category. You'll find a
11 complete description of all the services under -- in
12 Section C of the draft RFP. Next slide, please.

13 Our favorite topic, other direct costs. This
14 has come up in many of our meetings. How are we gonna
15 tackle this? How are we gonna do it? And as you guys
16 know, the agencies, they handle this a lot of
17 different ways. Some agencies have varying
18 thresholds. Some agencies include this, you know,
19 based on a labor hour type solution. So what we
20 wanted to do, we knew that we could not create one
21 complete solution that would just be -- that would be
22 okay, acceptable for every agency. So what we're
23 doing is this is the way we're defining the other
24 direct costs. I'm just gonna go through the
25 definition. Other direct costs are costs relating to

1 incidental services and/or supplies that do not fall
2 within the scope of any other service category listed
3 under the BMO acquisition vehicle. These services and
4 supplies, however, are necessary to complement the
5 contractor's offering to provide a comprehensive
6 solution, so the ODCs will be handled how the agencies
7 currently handle it. So if an agency has a threshold
8 saying that, well, ODCs are included at the \$2,500
9 threshold, we're allowing at the task order level for
10 agencies to input their own policies and language
11 regarding other direct costs.

12 So services that are not within scope. I'm
13 just gonna go through this list. But basically, these
14 are the services that we've identified that do not
15 fall within the BMO scope. So these are -- the first
16 one is the energy management and water conservation.
17 These are -- I want to make sure we highlight this
18 'cause we're saying well, you know, in plumbing there
19 are a lot of water conservation methods and things.
20 So this is directly related to the reduction of the
21 water usage, so it's not saying don't put your energy
22 management services into one of the other categories
23 listed, but this is services directly related to that.
24 It also gets into services such as telecommunication
25 services are not included. Equipment owned and

1 operated by government agencies. Furnishings are not
2 included. Equipment owned by servicing public
3 utilities, upgrade of software or software licenses
4 and computers and IT equipment as well as personally
5 owned equipment, so these have been defined as
6 services that do not fall within the Building
7 Maintenance and Operation scope.

8 That is Section C. So you can -- in the
9 draft RFP, you will be able to find more information
10 and more detail on the definitions. We also list like
11 a list of definitions of terms you'll see in the --
12 throughout the draft.

13 So moving on to Section D, your package and
14 marking. This is just a standard section, and what we
15 do is we just ask that you conform to your standard
16 commercial standings, and then we just make a note
17 that additional language can be added at the task
18 order level. So if an agency has information that
19 they need pertinent to like the packing and marking,
20 they will put that information in. Next slide.

21 Inspection -- let me say that slowly -- and
22 Acceptance. We're using the FAR Clause 522464 for
23 inspection of services. And again, this is another
24 standard section that additional language can be added
25 in at the task order level. We understand that this

1 is a broad scope in that, you know, agencies may have
2 their own methods of inspecting and acceptance, so we
3 definitely allow the flexibility at the task order
4 where they can put in their language here. Next
5 slide, please.

6 So moving on to Section F. Section F
7 discusses the place of performance, period of
8 performance, performance standards and deliverable and
9 reporting requirements. Some of the -- again, this
10 highlights it. You're gonna see it multiple times.
11 Zone One, that's the places of performance, so for the
12 entire area of Maryland, Virginia, District of
13 Columbia, New York, Pennsylvania, New Jersey, West
14 Virginia and Delaware. That's where the actual
15 performance will be performed in the zone area, Zone
16 One areas. Period of performance, so this -- we've
17 noted in the contract that the period of performance
18 will be from the notice of proceed through five years
19 with one five year option. Now, this may change based
20 on what the deviation receiver will be. So if it's a
21 10 year deviation, it will probably be a 5 year with
22 one 5-year option. If it goes 12 years, it will be a
23 5 year, a five year option and then another two year
24 option. So that language will be finalized in the
25 final RFP, but just note that this may vary from the

1 draft.

2 Section G talks about the contract
3 administration. This is where you'll find your
4 information about the roles and responsibilities.
5 You'll find what is a CO. What are we defining as CO?
6 Just so we know that we're gonna -- you'll see two
7 different terms. You'll see CO, and you'll see OCO.
8 The CO is the BMO Contracting Officer. That's me.
9 Patrick, raise your hand. That's Patrick. And the
10 OCOs will be the ordering contracting officers, so
11 basically our customer agencies that will be placing
12 orders. So when you see those terms, know that the
13 BMO is for the parent contract, and the OCO will be
14 for the task order. It also defines other roles, like
15 what the core roles are and various roles that will be
16 required to administer this contract.

17 We also talk about the CAF fee. CAF fee,
18 which is the contract access fee. The contract access
19 fee will be the total of two percent of the fixed
20 price or the estimated price and will be proposed as a
21 separate contract line item number. So as you've
22 probably seen in many of the other FSSIs, this is
23 standard language. This is a standard two percent fee
24 that will be charged for the services. So you've see
25 this probably more than once, and so this is just,

1 again, standard language.

2 BMO reporting modules. We've noted that with
3 FSSI, as Walter mentioned earlier, one of the elements
4 of FSSI is to be able to report and have the -- you
5 know, to know what we're tracking so agencies can see,
6 you know, different reporting functions. So we're
7 gonna be asking for reporting information, and some of
8 that reporting information will include task order
9 award data. We wanna know -- you know, get a break
10 down of that. We wanna know the data for the
11 variations of contract type, so we wanna want know
12 what they're ordering. Are you doing mostly firm fix
13 price contracts? Are you doing any time and material
14 type contracts? We'll be asking for your task order
15 modification data. What is being modified? We'll be
16 looking for information on your award data.

17 We'll also be tracking the sustainability
18 products data, so we'll wanna know, you know, the
19 sustainability elements that are included in these
20 orders that you're placing out. We wanna know the CAF
21 payment data. We're also looking for closeout data.
22 So when you're closing your task orders out, we're
23 gonna be looking for varying information on closeout
24 data, and then we also wanna know information
25 regarding the subcontracting plan data. So all

1 this -- all these reports will, you know, keep us
2 accountable, make us understand our buying habits and
3 which will in turn create, you know, better buying
4 habits, will create behavioral changes and allow us
5 to, you know, give the best vehicle possible.

6 Section H. Section H provides information on
7 general information for your special contract
8 requirements, so anything that is special to this
9 contract. So we're looking at things such as your
10 federal holiday observance, working hours, ordering
11 procedures, how we're identifying NAICS and product
12 service codes, accounting system requirements, special
13 plans, meetings, marketing, things of that nature.
14 You'll be able to find this in Section H. So for your
15 ordering procedures, as I mentioned earlier, we're
16 asking that all task orders under BMO basically be
17 solicited and awarded by an OCO. That's your ordering
18 contracting officer with a delegation of procurement
19 authority, and more language will be provided on the
20 BMO web page as well as we will be providing training.
21 GSA will be providing training to agencies on the
22 delegation of procurement authority.

23 We're asking that all task orders be within
24 the scope of Section C and all the other terms and
25 conditions under the BMO contract. We are asking to -

1 - you identify that BMO labor categories and service
2 occupational codes as we discussed a little earlier.
3 We're asking that all the awards be solicited and
4 awarded under the proper NAICS code, and we'll go
5 through that in a little bit. We're also asking that
6 the corresponding -- you place the corresponding MA
7 IDIQ contract number. We're wanting to make sure that
8 all the proper product service codes are identified,
9 and we have pre-identified that list, and that is an
10 attachment in the RFP as well, and we're asking you to
11 comply with the ordering procedures under FAR Sub Part
12 16.505 and any other applicable agency requirements
13 that are listed. Then we're also asking in addition
14 to the sub -- it's actually a Sub Part under the
15 ordering. We're looking to comply with the Fair
16 Opportunities Ordering Procedures that are identified
17 in Sub Part 16.505, so we want you to get familiar
18 with that. Again, I know that this is an open market
19 procurement, and we're using some of the ordering
20 procedures identified FAR Par 16.505, so we definitely
21 want you guys to get familiar with that.

22 Moving on to the NAICS. So we discussed a
23 little bit about the NAICS, and what we're gonna do is
24 just identify the NAICS, so we've talked about our two
25 services groups. So we have our Facility Support

1 Service, and we have our Operation and Maintenance.
2 Our NAICS, we have identified the NAICS that
3 correspond to our service groupings as well as the
4 individual services under that service grouping. So
5 we have two separate service groupings, and we have
6 NAICS that span across 18 different NAICS codes under
7 the Operations and Maintenance and Facility Support
8 Services, and we've identified the small business
9 standards. We've identified that basically all of our
10 services kind of fall under one small business size
11 standard, so we'll go ahead and go to the next slide.

12 This is the Operations and Maintenance
13 primary NAICS codes. So as you see, again, you can
14 see the primary NAICS standard is the 561210, and you
15 see that that's basically the primary NAICS that we're
16 identifying for the BMO vehicle. Now, at the task
17 order level, depending on the service that they are
18 selecting, the ordering contracting officer, the OCO
19 will select the predominate NAICS code. So as you
20 see, for instance, elevator maintenance may be the
21 primary NAICS code. So you'll see the varying size
22 standards. Again, we've correlated the varying
23 services listed under each category as well as the
24 NAICS codes that correspond to that service category.
25 And next slides.

1 And this is the Facility Support. And as you
2 see, we've identified that the -- and this is
3 something that we're really looking for feedback on as
4 well. Once we did the research and kind of making
5 sure we're reading through the correct NAICS, it seems
6 like all of our services on both sides fall under the
7 one NAICS, the 561210. So if you have any additional
8 feedback on this particular subject, please feel free
9 to provide us that information. But we've done the
10 same thing with the facility support as the previous
11 slide. We've corresponded all the services that fall,
12 all the NAICS that fall under that particular service
13 category.

14 So GSA will establish a BMO web page for the
15 purposes of informing our customers, stakeholders and
16 the general public the attributes of the procedures of
17 BMO. The web page will include information such as
18 the key personnel point of contact, the list of
19 contractor names, numbers, delegation of procurement
20 authority process for the ordering contract officer.
21 We will have training, BMO training. There will be
22 ordering guides so agencies will know how to go about
23 ordering from the vehicle. They'll be sample
24 templates. We'll have a statement of work templates
25 and things of that nature. They'll be a scope review

1 process so we can, you know, identify, you know, how
2 it comes up as is that really in scope or not.
3 They'll be statistical information, also links to
4 other mandatory website for reporting purposes, and we
5 also put the list of contractors that are not eligible
6 due to certain things like being in a dormant status,
7 and we'll talk a little about that later.

8 Minimum task order awards. So starting from
9 the date of the notice to proceed, the contractor
10 shall obtain a minimum of five task orders or a total
11 of task order estimated value of \$100 million. Now,
12 this particular requirement is definitely gonna be in
13 the unrestricted solicitation, and we're looking for
14 feedback on that as well. But for the small one, this
15 requirement may vary, so we're looking for feedback on
16 both. We're just wanting to make sure that we are
17 asking for, you know, the appropriate amount in the
18 value, so we're looking for feedback again on this
19 one.

20 Section H talks about on-ramping, dormant
21 status and off-ramping, and I'll go into each one.
22 On-ramping, so the purpose of on-ramping is basically
23 to ensure that the BMO vehicle will have an adequate
24 number of contractors to meet the government
25 requirement under BMO. So we understand that, you

1 know, through time, things may fluctuate. Maybe the
2 service size has changed, and the numbers may
3 fluctuate, so we want to allow the flexibility to make
4 sure that we have the adequate number of contractors.
5 And so in order to do this, we go through the process
6 of on-ramping.

7 There are three different types of
8 on-ramping. The first type is vertical on-ramping,
9 and vertical on-ramping is the process where a small
10 business no longer certifies as a small business and
11 they've been moved to a large business and they go
12 through the process of being on-ramped, and it is in
13 the RFP. It's the requirements will be stated on that
14 process, but some of the general requirements
15 basically is -- basically when the contractor has
16 outgrown their small size standard on the basis of
17 natural growth. So we'll identify that, so this can't
18 be done based on a joint venture or a merger
19 acquisition or a novation. This is where a company's
20 business size has changed based on natural growth, and
21 they have -- make sure that they have demonstrated
22 successful performance under the BMO small business.
23 They meet all the evaluation criteria, and they will
24 actually submit a proposal in response to the
25 solicitation that will be an identical version of the

1 BMO unrestricted solicitation. So you can find more
2 important about the vertical on-ramping and the
3 requirements and the procedures under Section H.

4 The next type of on-ramping is open season
5 on-ramping. The government will reserve the right to
6 determine if it would be in the best interest to
7 initiate an open season to add additional contractors.
8 So we may find that there may be a need just that
9 maybe our service areas are growing or we have another
10 agency that made a large commitment, and we may
11 determine that more contractors need to be on this
12 vehicle. So to do that, we would use the open season
13 on-ramping.

14 The next type of on-ramping is the a focus
15 on-ramping. Now, the focus on-ramping would be a sub
16 pool creation. So maybe we've -- you know, we're a
17 couple years into the contract, and maybe we've
18 determined that one of our optional services should be
19 a required service or there needs to a total new group
20 of services under the scope. So we would create a sub
21 pool and could possibly on-ramp new vendors and as
22 well as add the existing vendor under that new sub
23 group. So should that occur, the focus on-ramping
24 would take place. Sorry.

25 So dormant status. Dormant status is if the

1 BMO CO determines that the requirements of the BMO are
2 not being met, the contractor could be placed on
3 dormant status. Dormant status may be activated for a
4 given BMO group that has been awarded, and their
5 information on what the dormant status involves. But
6 if it is activated, the contractor will not be
7 eligible to compete in any subsequent task order
8 solicitations. However, if they're currently in, they
9 would be able to perform under their current awarded
10 task order solicitations, and that include like the
11 options as well. So dormant status, however, will
12 only be impose after careful consideration of the
13 situation, and there will be strong collaboration with
14 the BMO CO before this determination has been made.
15 So there will be an opportunity to correct any
16 insufficiencies, so that would happen before a dormant
17 status would occur.

18 And then off-ramping. Off-ramping basically
19 is where GSA, we're gonna reserve the unilateral right
20 to off-ramp non-performing contractors. And
21 contractors that are off-ramped, again, they will no
22 longer be able to receive task orders and they --
23 contractors under more than one BMO service group will
24 be off-ramped for the service where the non-performing
25 contractors have issues -- issues have occurred.

1 Next slide. Section I. Section I is just
2 your contracts clauses. These are the contract
3 clauses you've probably seen with varying complete
4 facility maintenance contracts, so this is where you
5 can find the complete list of the contract clauses
6 incorporated by reference and the ones in full text.
7 You know, understand that these clauses can be
8 tailored at the task order level. Because we have
9 varying -- we're offering varying contract types, some
10 of the clauses will be -- need to be added at the task
11 order level. As you know, for time and material,
12 there may be a different clause, and so you'll find
13 your full list of clauses. Just understand that at
14 the task order level, additional clauses can be
15 incorporated.

16 Section J. This section is where you're
17 gonna find all your attachments, so every attachment
18 that will be incorporated for the draft RFP will be
19 under Section J. We are -- a few of the attachments
20 have already been published with the draft. You've
21 probably seen the notice of public and interested
22 offers. You've seen the public notice of the industry
23 day just announcing this event. We did list the
24 standardized labor categories and definition because
25 we want feedback on that and we want you guys to get

1 familiar with that. And then we've also listed the
2 list of the BMO product service codes that
3 corresponds. You will see additional attachments such
4 as additional personnel qualification that we're
5 looking for, sustainability product list that we're
6 looking for, checklist to make sure that the proposal,
7 all the information is submitted to help you guide
8 through the proposal process.

9 Self-scoring worksheets. You will be asked
10 to self-score yourselves based on the evaluation
11 criteria that will be listed. Pre-award surveys, past
12 performance rating surveys. We'll get a little bit
13 into the requirement when we talk about the evaluation
14 factors, but this is where the template will be. Your
15 price template will be in this section. We will give
16 a template for the relevant project experience so we
17 can ensure that you're providing all the information
18 that we're looking for. This subcontracting plan
19 template will be in there. And again, as Janet
20 mentioned earlier, this will only be a requirement for
21 the large businesses, and the template is an optional
22 template. It's a GSA template. You guys have
23 probably seen it. You can use, you know, your own
24 template. You know, just ensuring that you have all
25 the information that is required of the subcontracting

1 plan, and then will we also include varying reporting
2 requirements.

3 Section K. Most of you are probably familiar
4 with this. This is just a standard section where you
5 will have to completely fill out your representations
6 and certifications so all -- because this an is open
7 market vehicle, we need a full list of your reps and
8 certs.

9 Section L. This section, you'll probably
10 refer to a lot when you are creating your proposal.
11 This section is going to give you information on the
12 instructions, conditions and notices to offers and
13 respondents. So this is where you're gonna see all
14 your provisions, all the FAR and GSAR provisions, the
15 proposal format. We will have more detailed
16 instructions on how we want things labeled. You know,
17 what we're asking you to submit, page limitations,
18 format, things of that nature. And then so this
19 section, basically you'll just refer to and we'll put
20 more information in as we finalize the RFP. Next
21 section, please.

22 Section M. This is the section I get -- most
23 of you wanna know, like how are we gonna be rated.
24 These are -- Section M will cover the evaluation
25 factors. Section M is gonna discuss the basis of

1 award. This basis of award will be based on a best
2 value continuum for awards, so we're gonna be looking
3 at the highest technically rated offers with fair and
4 reasonable prices. So we're gonna be asking for a
5 variety of core expertise and a variety of services
6 that are most important to the government, and we'll
7 go through that list. We intend to award contracts
8 without discussion, so we're looking for your best
9 offer up front. The government may conduct
10 clarification. So if we see fit that, you know,
11 there's a clarification item we're looking, we may
12 contact you to clarify item of your proposal, and we
13 do reserve the right to, to conduct discussions if
14 determined necessary, so that option is there.

15 So we will -- the BMO evaluation team will
16 perform a two-step screening process for all offers
17 received. First, we're going to verify that the
18 support documentation exists. We're looking for all
19 of the documentation and for all the evaluation
20 elements in accordance with the proposal checklist.
21 So the proposal checklist will, again, be a guide so
22 you can go back to make sure that you submitted the
23 varying elements that we're looking for. And once
24 that happens, then we will compare all of that
25 information to your self-scoring worksheet that you

1 will see as an attachment as well. And then any
2 discrepancies in that process will be treated as
3 clarification, so we will, you know, contact you to
4 clarify if anything is wrong.

5 And then once the screening process has been
6 completed, the evaluation team will assign a
7 preliminary score in accordance with the scoring
8 table, and that section will be incorporated in the
9 final RFP, so you will know how you're being scored,
10 you know, what the top scores are available for
11 offers. And then once the preliminary scoring is
12 complete for all offers, the BMO evaluation team will
13 sort the offers from highest score to lowest score for
14 each service group. So again, there are two separate
15 service groups. So the scores will be based on the
16 O&M and the Facility Support Services, and then we
17 will be developing a competitive range based on that,
18 and so the offers that fall within the competitive
19 range will move on.

20 So what are we evaluating you on? There are
21 four sections in the evaluation factors. Section 1 is
22 just a general information. We're just gonna be
23 looking, you know, verifying that everything is
24 complete within your standard Form 33. We're gonna be
25 looking for and making sure that the checklist has

1 been completed. We're gonna look at your self-scoring
2 worksheet, and then you'll find information in that
3 section if there are meaningful relationship
4 commitment letters and existing joint venture and
5 partnerships, so you'll find information in the
6 evaluation factors. But if you've created these prior
7 to award, these will be accepted, and so we would just
8 ask that information up front. Next slide.

9 So the Section 2 of the evaluation process,
10 this is your responsibility section, so we're looking
11 for all of the responsibility elements. So your SAM,
12 which is the System for Award Management record, which
13 was previously known as your CCR, and it also will
14 include your excluded parties list, so we're just
15 asking for a copy of that. We're gonna be verifying
16 your reps and certs as referenced in Section K. We're
17 gonna be verifying all the financial information that
18 you've presented us from your GSA Form 527, and then
19 we're also gonna be verifying the information that
20 you've given us for the pre-award survey that's
21 referenced on the form -- Standard Form 1408.

22 So Section 3 of the evaluation factors
23 references the technical experience. So in the
24 technical experience, we are looking for your relevant
25 project experience. What we're looking for here. We

1 want three different distinct projects per service
2 officering, so these projects can cover a single or
3 multiple services. So for instance, say you're,
4 you've giving us a project that may cover HVAC
5 services, electrical maintenance, and so we --
6 basically, we just ask you to identify each service
7 that the project is getting. However, if you only
8 have a project that covers one service category, you
9 can also present that, but we need three per service
10 category. So for all the services that you're
11 offering, we need three per service category. And
12 again, it could be a project that includes all of
13 these service offerings, and it could be a single
14 project, so we're looking for three. These projects
15 have be -- must be have completed within the past
16 three years, or they may be ongoing within the year.
17 And these projects may be -- they may be Federal
18 projects, U.S. Federal Government projects. They may
19 be state government or they can be non-government
20 commercial projects.

21 Each project, this is what we're looking for
22 for these projects. We wanna know the building type.
23 What type of building was it? We wanna know the size
24 of the building, the square footage. We wanna know
25 how many stories are in each building of that project.

1 We wanna know the services covered relevant to the
2 scope of services in Section C., so we want you to
3 clearly identify the services that -- of the project
4 that are correlating to the services that you're
5 proposing. We wanna know the period of performance.
6 How long was the project? You know, if it's still
7 ongoing, how long is the project? The total dollar
8 value of that project. We're looking for how many
9 employee -- trade skill employees were they for that
10 particular project, and we're also looking for the
11 number of exempt positions employed for that
12 particular project.

13 We want this project to be a complete, clear,
14 concise detailed statement of the description of
15 services covered in the project. We wanna know how
16 you provided these services. We're not looking, you
17 know, a restatement of, you know, what the government
18 is looking for. We're looking for in this project how
19 did you complete these services. You know, were there
20 any obstacles that you came up and how you tackled
21 those obstacles, so we're looking for that information
22 for the relevant project experience. Next slide,
23 please.

24 So I guess let me go back a little bit. One
25 think that I didn't mention. So in the evaluation

1 factors, there are certain elements that will be rated
2 as a pass-fail requirement. And so you can go -- when
3 you go into the RFP, it will say this element is a
4 pass-fail requirement, meaning that you have to
5 provide us this. Otherwise, you're not gonna be
6 considered. However, there are other factors that --
7 where you can receive additional criteria or
8 additional evaluation credit for factors. So for the
9 relevant project experience, you're gonna be able to
10 receive additional evaluation credit if the project
11 was a U.S. Federal Government customer, if you're
12 presenting us with the relevant project that involves
13 subcontracting and teaming with small businesses so we
14 can ensure that, you know, the small business goals
15 are being met. If you're offering optional services.

16 Because we want this to be a complete,
17 comprehensive solution, if your company is offering
18 some of the optional services, there will be
19 additional evaluation credit received. Also, if the
20 project that you're presenting has an extended
21 contract duration, meaning over three years. We're
22 looking for, you know, the longer projects. You're
23 gonna be able to receive additional evaluation credit.
24 And if your project has a large -- a larger square
25 footage. So projects over 20,000 square footage, you

1 will be able to receive additional evaluation credit.
2 And you will be able to find more information in
3 Section M of the evaluation factors on the varying
4 factors that are pass-fail as well as the ones you
5 will get additional project -- I mean, additional
6 credit for.

7 So Section 3 also talks about the project
8 location. So I know you've heard more than once we're
9 looking for Zone One. So how do we, you know, ensure
10 that your company can provides coverage for the entire
11 area of Zone One? What we're looking for is a list of
12 projects. Now, we don't want a comprehensive project,
13 relevant project experience where all of the project
14 information is spelled out. We're just looking for a
15 list of projects, and we will identify, provide
16 guidance on what we're looking for, but we're
17 basically just looking for the list of projects for
18 areas for all of Zone One. So we wanna know, you
19 know, if you did a project in DC, if you did a project
20 in Pennsylvania. We're looking for that list of
21 projects. So you may be thinking well, what if my
22 company -- what if I had -- can provide coverage in
23 that area, but I have not done a project yet? We are
24 giving a deviation for that. So if your company is
25 not -- maybe doesn't have a project in that area, but

1 you know that your company can provide coverage, we're
2 looking for a narrative for you tell us how you will
3 be able to provide coverage because we want to ensure
4 that coverage will be provide for the entire area of
5 Zone One.

6 And so in this element, this is a pass-fail.
7 The project location is a pass-fail requirement.
8 However, you can get additional evaluation credit in
9 this area as well. So if your projects, meaning the
10 relevant project experience that you submitted covers
11 multiple locations listed in Zone One and you've
12 identified that, you know, this project was coved in
13 DC and, you know, part of this was done in New York,
14 additional criteria can be listed. So when you're
15 thinking of the project that you're wanting to submit,
16 think of those elements that could give you the
17 additional evaluation credit. Next slide, please.

18 Section 3 also asks for a staffing plan.
19 This is really general. You've probably seen this in
20 several government contracts. We're basically just
21 looking for you just to spell out the roles and
22 responsibilities for the employees. We're also
23 looking for your professional compensation plan. We
24 just want to make sure that we ensure that this
25 addresses the offer's methodology for determining your

1 salaries, your fringe benefits, professional employees
2 in preparation for your future task orders. So you
3 will get guidance in this section on the elements
4 included for these plans, and all these requirements
5 are pass-fail. And then we also are looking for your
6 uncompensated overtime policy, and every company
7 should just be able to provide us with information on
8 how you're addressing that. So again, you can find
9 more information in this section.

10 Section 3 of the evaluation factors also asks
11 for the subcontracting plan. I know I've mentioned
12 this a little earlier. This is only gonna be a
13 requirement for your large businesses, and it's
14 basically -- again, you can use the format that we
15 provide, and you guys are already familiar with this.
16 So if you don't use the form -- I mean, the template,
17 then we just basically ask that you make sure all the
18 information is provided from the requested
19 information. This section outlines everything, so you
20 will be able to find more information on that. We're
21 also looking for a sustainable plan. As you guys
22 know, we have several executive orders, you know,
23 requiring certain sustainability factors, and so we
24 want to ensure that, you know, we are meeting those
25 requirements. So we want to know your approach

1 towards implementing and promoting sustainable
2 practices in all of the BMO services that you're gonna
3 be offering. And then if you're doing anything
4 different, if you're doing practices above and beyond
5 the minimum requirements -- and we have identified all
6 the requirements in this section. But if you are
7 doing anything above and beyond in the sustainability
8 element, additional credit can be given here as well.

9 And then we also are going to ask for your
10 quality control plan. This is where we want a
11 description of your internal review process. We wanna
12 know your quality standards. We wanna know how you
13 tackle, you know, different issues, how you are
14 following up making sure that the quality -- that
15 adequate quality is being provided for the task
16 orders, so we want to know that. And again, this
17 section will provide the detailed description of what
18 we're looking for from your quality control plans.

19 So Section 3 also wants your past performance
20 information. What we are asking for. We want past
21 performance surveys for the relevant project
22 experience submitted. So we're looking for that, so
23 we -- we'll have a past performance survey that we
24 will -- in our attachments, so we're looking for that
25 past performance, and then we also will verify the

1 PPIRS system, Past Performance Information Retrieval
2 System. And then if past performance information is
3 not available, then we will -- you will get a neutral
4 rating for past performance.

5 So the final section of the evaluation
6 factors is price. So basically, you know, we've
7 discussed that we're looking for -- we're gonna be
8 looking for firm fix pricing, hourly rates for all of
9 the Bureau of Labor Statistics standardized labor
10 categories that we're presenting. And we basically
11 will provide you a template on the information that
12 we're looking for, but we want to know the minimum
13 rate. This is an area that we, you know, really want
14 feedback on as well. We understand that because of
15 this zone, this zone has varying collective bargaining
16 agreements. We know the SCA comes into play. We're
17 asking for a breakdown of the base rate, and so we
18 also want to know like your health and welfare rates.
19 We're looking for the overhead. We're looking for a
20 breakdown of your G&A profit and the fully burdened
21 rate. So we're gonna be asking you to break out these
22 elements and we'll be, you know, also asking for
23 feedback. Is there different ways that we can look
24 into, you know, dealing with like collective
25 bargaining agreements and so forth.

1 We're also wanting to know your government
2 and commercial price for these labor categories. So
3 we understand that we are offering the standardized
4 labor categories, so we're looking for the labor
5 categories that -- basically that are similar to what
6 we're looking for in our standardized labor category
7 list. So what you're offering commercially, we're
8 looking for that comparable hourly rate of the labor
9 category. And then we also will be asking you for
10 your tier pricing. As far as the FSSI program, you
11 know, we look into finding ways to, you know, provide
12 savings and discounts, and so we will be asking for
13 your tiered pricing.

14 And that is the last section, believe it or
15 not, of the draft RFP. So I'm going to turn this back
16 over to Mary, and we'll get into the questions. Thank
17 you, guys.

18 MAN: Can I just say one thing off of what
19 Josilyn said real quick? Again, my name is Patrick.
20 I work with Josilyn on all of the contracting stuff.
21 Eric, can you go to the service grouping slide? I
22 just wanna say one thing to make sure it's clear to
23 everybody. So we mentioned there's gonna be two -- we
24 mentioned the two service groupings. We mentioned
25 there's gonna be two solicitations. I don't know if a

1 lot of you were thinking, but if both solicitations
2 and both service groupings can have all the services,
3 why are there two? I just wanted to make sure that
4 was clear. Again, operation and maintenance will be
5 one solicitation. That will be the unrestricted one.
6 The -- okay. I apologize.

7 JOSILYN REED: Thanks for bringing that up.
8 It is a confusing concept. There will be two
9 solicitations that cover both service groups, so the
10 service groups will -- under each solicitation, there
11 will be an operations and maintenance and there also
12 will be facility support services. You can either be
13 under one service group, so basically meaning that
14 your company could only provide services for either
15 the operations and maintenance or your company can
16 provide services for the facility support. And if
17 your company provides all of these services, you would
18 simply apply for the operations and maintenance, and
19 you see the facility support services are listed as
20 optional services. The two solicitation will be based
21 on an unrestricted pool and 100 percent small business
22 set-aside, so those are the two different
23 solicitations. So I'll turn it over to Mary, and
24 we'll get into the questions. And if anything is
25 confusing, we definitely try to cover that, get those

1 covered.

2 MARY SNODDERLY: Okay. Let's go ahead and go
3 to the next slide and talk about some next steps. So
4 what's happening? You've heard Josilyn say the draft
5 RFP closes April 17th. Now, what does that mean? You
6 also heard Josilyn talk as she went through the
7 different sections. You know, we want your feedback
8 on the whole draft RFP, but obviously, there were
9 certain sections, and I know Josilyn called them out.
10 We really want your feedback on these particular
11 sections, so that what it means by the draft RFP.
12 We're requesting your feedback -- and again, we need
13 that by April 17th, and this information then will be
14 considered. Josilyn, Patrick, the team will take a
15 look at it, and then we will see what we can
16 incorporate into the final RFP.

17 Now, we do expect to release the final RFP in
18 May. Yes, that is very aggressive. But, you know,
19 you heard Mary talk. She's holding our feet to the
20 fire on this one, so we're really trying to get that.
21 And what does that mean? We are expecting award in
22 September, so our goal is to award by the end of this
23 fiscal year. Okay?

24 Now, the only thing -- the only thing that we
25 really have left to kind of cover through this morning

1 is we do have our question and period. I think I
2 mentioned earlier we're gonna break that up into two
3 different sections. Janet's gonna come up. She's
4 gonna read through and answer the questions that can
5 be answered at this point that we have, and I think
6 there was over 80 questions on the list. We kind of
7 grouped them by sections like Josilyn when she went
8 through the draft RFP, and then we're gonna actually
9 open it up to the floor so that you can ask your
10 questions. Now, we're not guaranteeing answers.
11 We'll answer what we can at this point. We may have
12 to do some research. There may have be something
13 else. But again, we will get those questions answered
14 and post them to our Interact site.

15 Before we get into the questions and answers,
16 we're gonna take another short break. How about we do
17 about 10 minutes, and then we come back and then we'll
18 wrap it up with all the questions and answers? So
19 I'll see you back in 10 minutes.

20 (A short break was held.)

21 MARY SNODDERLY: We have given you a lot of
22 information today, haven't we? But here is maybe part
23 of it you've been waiting for as well, the question
24 and answer period. So what I'm gonna do is I'm gonna
25 invite Janet Schweer to come up again and go through

1 the existing questions that were given to us prior to
2 the event, and then I'm gonna come back up and we're
3 gonna kind of open it up for questions. When we do
4 open it -- and I'll state this again. When we do open
5 it for questions, we ask that you state your name and
6 your company. This is so our court reporter can get
7 everything, and then we'll ask the panel up here to
8 answer the question. So right now, I'm gonna ask
9 Janet to come on up.

10 JANET SCHWEER: Thanks, Mary, and we
11 apologize for not having the questions up on the -- I
12 think Mary said earlier we have like 80 some
13 questions. We don't have the answers all typed out
14 and real pretty yet, but they'll be on the Interact
15 site after we complete our circuit and we have hit all
16 three places. Some of these have -- these are the
17 questions, again, that we received ahead of time, so
18 they may have been answered already in our session.
19 I'm still gonna go through those kind of quickly. And
20 like Mary said earlier, some of them we don't have
21 answers to. We have to research, but I'm gonna read
22 the question anyway just so -- if it was your
23 question, you can know that we have it down and we're
24 gonna answer it.

25 We did get a few questions about, you know,

1 BMO FSSI is very similar to Schedule O3FAC. The
2 question was why do contractors already on the O3FAC
3 schedule have to compete to get on this solicitation.
4 Well, the easy, black and white answer is this is a
5 different solicitation. This is a different contract.
6 There are different terms and conditions, as Josilyn
7 went through, versus what you would have gone through
8 to get on the O3FAC solicitation. The ordering
9 procedures for schedules are based on Federal
10 Acquisition Regulation Part 8. These are gonna be
11 based on FAR Part 16. There's different contract
12 ordering types for the BMO vehicle versus what can be
13 used at the schedule level, so there's a lot of
14 differences. And one of the other key differences, of
15 course, is that the schedule is for nationwide
16 delivery. This is only for Zone One, as Josilyn
17 emphasized, so it's a completely different
18 solicitation. We can't just roll over, you know, your
19 proposal from a different contract into a new
20 contract. And as Mary stated earlier, it's not a BPA
21 off the schedule, so that might have been part of the
22 confusion in that question, as some of the other FSSIs
23 are.

24 The next question we received was has it been
25 determined how many federal agencies will be required

1 to utilize this BMO contract. If so, can you provide
2 the names of the federal agencies that will
3 participate? In the future, will it become mandatory
4 for all federal agencies to utilize this BMO contract
5 since it will save government funding?

6 So the first question was has it determined
7 how many agencies will be required to utilize the BMO
8 contract, and the easy answer to that is at this
9 point, it's not mandatory. It would be up to each
10 individual agency if they wanted to make using this
11 vehicle mandatory over the other internal control
12 vehicles that they had. Most FSSIs -- and Walter can
13 correct me if I'm wrong, if not all, I don't think any
14 of them are mandatory. Are they?

15 WALTER ECKBRETH: No, none are mandatory.
16 Some agencies have made certain solutions mandatory,
17 but none are mandatory government-wide.

18 JANET SCHWEER: So we don't know how many
19 agencies could use it. It's open to -- it's a
20 government-wide vehicle, as Josilyn said.

21 So in the future, will it become mandatory
22 for agencies to use this? Based on previous history,
23 no, probably not. But again, at the agency level, if
24 they decide that this is a good use of their time and
25 a good way to save money, they can make it mandatory

1 at the agency level.

2 The next question was as are common types --
3 I think it's supposed to be common contract types
4 applied to major O&M work functions? Example,
5 preventative maintenance is commonly firm fix price or
6 material for service calls are commonly reimbursable.
7 We talked about this earlier. Josilyn mentioned this.
8 The vehicle will have different -- will allow for
9 multiple contract types in order to offer maximum
10 flexibility for the customers, and the customers can
11 choose which contract type of combination of them they
12 want to use at the task order level.

13 I'm sorry. I didn't mention this earlier.
14 We are going through these in order of the RFP, so I'm
15 going through Section B where they kind of refer back
16 to. The next couple of questions are based on the
17 Contract Access Fee, the CAF, CAF. The question was
18 can more detail be provided as to what the percentage
19 of the fee is going to be set at. So I'm not sure if
20 this company missed it in the RFP, but the CAF is set
21 at 2 percent. And then the next one was will the CAF
22 be capped at a certain percentage either by task order
23 or by term of the contract? Again, it's 2 percent.
24 That's the maximum.

25 The next question was about the labor

1 categories and the standard occupational
2 classifications. A large number of facilities that
3 could possibly use the BMO FSSI operate under a
4 collective bargaining agreement. How will that affect
5 task orders issued under the contract, since any
6 established labor rates or compensation would not be
7 recognized by the unionized work force. As most of
8 you are probably aware as contractors, you would be
9 required to pay the collective bargaining rates that
10 are already in place at that facility. As Josilyn
11 mentioned in the pricing section in Section M, we're
12 looking for ways to account for the Service Contract
13 Act, the Davis Bacon Act, collective bargaining
14 agreements. There's a variety of different pricing
15 regulations that everyone is gonna be subject to that
16 covers multiple geographic areas.

17 One of the ways we're trying to account for
18 that is by looking at the breakdown of the prices.
19 Everybody's gonna be using the same required minimums,
20 whether it's based on Service Contract Act or it's
21 based on collective bargaining agreements at a
22 specific facility. That part's not gonna change.
23 What's gonna change is the overhead, the G&A and the
24 profit. So we're looking for a streamlined, easy way
25 for you all, for us and for the customers to -- we

1 have to do a price analysis at the parent contract
2 level, and then the customers, of course, have to do
3 it at the task order level. So suggestions on that in
4 the pricing area, as Josilyn mentioned, we're happy to
5 take. We're looking for ways to do an objective
6 comparison, apples to apples comparison of the pricing
7 knowing that everybody's gonna be paying the same
8 minimums.

9 Next question. Under the firm fix price
10 contract task order, will GSA unilaterally change the
11 CAF as noted in B16? And no, the CAF will not change
12 at the task order level. We did look back at that
13 language and thought we could probably clarify it a
14 little bit more, so we will be looking at that in the
15 draft to clarify. Under -- the next three questions
16 are kind of all the same. Under cost reimbursement
17 task orders, will GSA unilaterally change the CAF?
18 Under incentive task orders, under time and materials
19 labor hours task orders, will GSA unilaterally change
20 the CAF? And the same answer; no, it will not change
21 at the task order level. We do have language in the
22 RFP that says GSA may periodically look at the fee and
23 re-evaluate it. That was not intended to convey that
24 it would be at the task order level.

25 We had several questions about the period of

1 performance, a couple that just said explain further
2 the 10 to 12 year period of performance. As Mary and
3 Josilyn both mentioned, we are going to be seeking a
4 deviation to regulations 'cause currently you should
5 only -- customers should only be issuing a five year
6 contract for services. What we didn't really talk
7 about, I don't think, was the reason we're seeking
8 that deviation to make our parent contract longer.
9 The reason for that is, as most of you know, a lot of
10 these contracts are one base -- you know, one year
11 base period, four 1-year options. If we have an
12 agency that just issued a bunch of contracts, you
13 know, this year, they're not gonna be ready to maybe
14 even move those to this vehicle for another four
15 years, so we wanna make our parent contract as long as
16 we can to give agencies time to transition, if they
17 want, to ordering from the BMO vehicle. If we were
18 only looking at a five year contract period, we
19 wouldn't be able to capture a lot of those potential
20 contracts.

21 One of the other questions was about the base
22 period and option period, and Josilyn mentioned that.
23 If we have 10 year period, we would have a 5 year base
24 and one 5-year option. If we had 12 years, it'd be a
25 five year base, probably one 5-year option and one

1 2-year option.

2 We discussed this briefly. When does GSA
3 expect to issue subsequent RFPs covering additional
4 zones? And Mary mentioned we're in the process still
5 of defining those zones and a timetable for rollout.

6 And then follow-up question was does GSA
7 expect the RFPs for the other zones to be structured
8 like this one? Yes, we do broadly expect them all to
9 be structured similarly, but we're still in the market
10 research phase. As I mentioned earlier, we do have to
11 look at the differences in spend in different areas.
12 The zones aren't based necessarily on GSA's regional
13 zone, but they could be, so we have to look at what
14 states make sense to kind of group together both --
15 and that's where we would want feedback from industry
16 as well as customers of, you know, where does it make
17 sense to make a zone? You know, we obviously won't
18 take states up from here and states from down here and
19 make one zone. We wanna make sure it makes sense, so
20 we're still researching that.

21 Similarly, since this initial RFP is to cover
22 Zone One, will contractors be required to go through
23 the same submittal process several times to cover all
24 future proposed zones? Yes. That's probably not the
25 answer a lot of people wanted to hear, but yes, they

1 would because they would be independent contracts.

2 The next question -- I'm sorry. I'm onto
3 Section C. This is specifically about the services
4 not within scope section. What is the plan for the
5 excluded services, which in some cases are inherent to
6 the current facility operation? If you remember,
7 Josilyn went through the section that had services
8 that were excluded. For example, you know,
9 maintaining personal appliances. Like if there was a
10 microwave in the break room, you know, contractors
11 wouldn't be maintaining that. So this is asking
12 that -- saying that sometimes those excluded services
13 are inherent to the facility operation. The list that
14 we have was developed based on current customer
15 requirements that, that were shared with us. If those
16 excluded services are desired by the customer, they'd
17 have to be procured outside of the BMO vehicle in a
18 separate acquisition.

19 Within the operation and maintenance scope of
20 services, elevator maintenance is a required service.
21 Since this is a very unique service, most contractors
22 utilize a subcontractor to perform the maintenance and
23 service calls associated with elevators to keep the
24 cost down. If a contractor consistently utilizes
25 elevator subcontractors to perform that type of work,

1 would this be seen as having the capacity and
2 capability to perform that required task. And that
3 answer is yes. If you are the prime contractor and
4 you've consistently overseen work that's being
5 subcontracted out in various areas, we would consider
6 that as capability to perform. Of course, you'd have
7 to submit the relevant project experience and all of
8 the information required by the RFP to show that.

9 The question is does this preclude a BMO
10 contractor from utilizing a subcontractor to fulfill
11 services requirements. So the answer is no, there's
12 nothing in our draft RFP that's intended to restrict
13 the use of subcontractors.

14 So this gets back to where we kind of left
15 off when Josilyn was done. Can proposal responses
16 include only one service category or do all
17 contractors must submit for both categories, O&M and
18 Facility Support Services? So responses can
19 include -- Eric, can you bring up our service
20 groupings slides again? Thank you. There we go. So
21 Josilyn, maybe I should let you explain.

22 JOSILYN REED: So first of all, I apologize
23 for the confusion on this. So we -- what we're
24 looking at is we're looking at two separate service
25 groups, so you have your operations and maintenance

1 and your facility support services. We, we understand
2 that a lot of companies provide -- under the operation
3 and maintenance that they don't always provide the
4 facility support services as well. So what we're
5 looking for -- you can either come in under the
6 operation and maintenance or you can come in under the
7 facility support services. It's one solicitation --
8 two solicitations, but two different service groupings
9 under that solicitation. You're either gonna say I'm
10 gonna apply for services under the operations and
11 maintenance or I'm gonna apply for the service group
12 for facility support service either in the
13 unrestricted solicitation or in the 100 percent set
14 aside solicitation. So I'm hoping that that's pretty
15 clear, but there's -- I know that we're gonna take
16 open questions. But on this particular question, are
17 there any questions on this?

18 JANET SCHWEER: So there will be two
19 solicitations. One will be for the unrestricted. The
20 other one will be for the small business set aside.
21 Both solicitations will have all of these services.

22 JOSILYN REED: Correct. Okay, great. Thank
23 you.

24 JANET SCHWEER: Thank you, Josilyn. One
25 question was please define required services and

1 optional services. So the ones that are required, you
2 must offer in order to be considered qualified. If
3 for some reason your company only does commissioning
4 services and that's just an optional service, you
5 wouldn't be qualified necessarily to submit a proposal
6 underneath this. You'd have to -- you can be part of
7 the solution as a subcontractor with one of the primes
8 that can do the required services.

9 Although each site will vary, are there
10 standard or common demarcation points for O&M
11 infrastructure functions? We weren't sure on that
12 one. We have taken that one back, and we will
13 research it with our commodity team.

14 And several of these are similar. How are
15 system equipment warrantee items covered under the BMO
16 O&M? That's one of the specific requirements that
17 would be to be determined at the task order level by
18 the ordering CO, and that would be in their specific
19 requirement that they would advertise when they're
20 going out for quotes. How will LEED EB O&M
21 certification goals, rating level and performance
22 period be determined along with what role will the BMO
23 contract play in the process? And again, those are
24 specific goals and rating levels that could be
25 determined at the task order level depending on the

1 requirements of the customer and their buildings. We
2 had another question about if elevator maintenance
3 could be subcontracted, and the answer is yes. We had
4 a question about what is the estimated percentage of
5 vertical conveyance equipment that is considered
6 proprietary. Again, that would be specified at the
7 task order level. Are there any high voltage
8 requirements associated with BMO maintenance and
9 repair? Again, it would depend on the facility, so
10 that would be specified at the task order level.

11 We kind of just covered this, but we had a
12 couple questions. If contractors only provide one of
13 those services, you know, for example only provide
14 pest control services, how could they participate in
15 this? And the answer would be it would have to be at
16 a subcontractor level. We had a question about -- as
17 you can see up here, we have fire suppression systems
18 maintenance and repair. It says water based, so we
19 did get a question about if it would contain new
20 non-water based system, and the answer is no. What is
21 the maintenance and repair threshold for roofing
22 repairs? That would be determined at the task order
23 level. How will exterior lighting of walkways and
24 parking lots be covered? That would be at the task
25 order level. Will any government-furnished space be

1 provided for pest control operation at the sites?

2 Again, these are very specific questions that would

3 depend on the facilities that were issuing -- you

4 know, ordering the services, so those would have to be

5 specified at the task order level.

6 What is the anticipated range of other direct

7 cost purchasing thresholds? Josilyn addressed this

8 earlier. We've outlined in the RFP that those to be a

9 specified by the ordering agency in the task order.

10 Our goal there is to provide maximum flexibility for

11 the customer and for you all, and the goal is for them

12 to continue procuring the other direct costs in a

13 method that make sense for them.

14 Are all contractors required to input data

15 into the CMMS or will GSA manage the data? Again,

16 that would be determined at the task order level.

17 What are the common BMO contractor requirements for

18 CMMS operations, and that would be determined at the

19 task order level. What are common authorization

20 approval methods for determining stock level and

21 considerable reimbursement invoicing? We're not gonna

22 define this process as with some of these other

23 questions. Because this is going to be a government-

24 wide vehicle, you know, we have created the frame

25 work. There's gonna be a lot of requirements that are

1 specific at the task order level. If we get too
2 specific at our level, then it can be restrictive for
3 the agencies that are trying to use it.

4 What is the common time period for the BMO
5 contractor to validate this inventory? Is this
6 inventory maintained in the CMMS? Is it the
7 contractor's responsibility to maintain the inventory
8 once it is validated? That's the same answer as
9 before. We're not gonna address that at the parent
10 contract level. It would be defined at the task order
11 level. Will workload data from each site be available
12 for this function? Again, to be determined at the
13 task order level. Will there be workload data
14 available for unscheduled preventative maintenance
15 tasks. At the task order level, that would be
16 determined. What are the common thresholds for
17 non-reimbursable repair? That will vary by agency, so
18 we can't dictate that in our solution. It would just
19 be described by the ordering contracting officer. How
20 service calls -- how are service calls prioritized,
21 and what are the common response completion times for
22 each classification of call? Again, that depends on
23 your site. It depends on the facilities and kind of
24 your geographic location. That will be determined at
25 the task order level.

1 I think we've gotten through most of the ones
2 where the answer is to be determined at the task order
3 level, and moving on just a general question just
4 addressed a minute ago. Is this RFP written for the
5 unrestricted BMO? Yes. The draft RFP that is out
6 right now is intended to be a draft for the
7 unrestricted part. We may tailor it, make some small
8 changes for the one that's for the small business set
9 aside.

10 Will the offer be required to have a bonafied
11 office in Zone One? No. Will there be an 8a set
12 aside for this contract? No.

13 We had another question about the period of
14 performance. How does this 10 year period of performance
15 align with the period of performance identified in Section
16 C-2? I think we discovered a couple points yesterday
17 where we may have referred to a 10 year period of
18 performance here or a 10 to 12 year period of performance
19 there, so we're going to go back through and clarify that.
20 It'll all be standard in the same, in the final. There
21 was a section about industrial operations analyst. I
22 think it's in the definitions section that talks about
23 contractor assistance visits. For those of you who are
24 scheduled contractors, you're familiar with these. There
25 was a question about how frequently those will occur, and

1 we do not know at this time. Follow up question was will
2 there be a standardized review process for that. Yes,
3 there would be a standard process. We can't tell you
4 exactly what that looks like at this time. Because this
5 is a new vehicle and it's not based on schedule or BPA
6 schedule, we'd have to come up with what the review
7 process would include for that.

8 Back to the contract access fee. Since the
9 fee amount is billed to the customer at a rate of 2
10 percent, where is the savings to the customer? Yes,
11 it's true, there is a fee that goes to the customer.
12 All government-wide vehicles include a fee to cover
13 their program costs. Schedules has a fee. The GWACs
14 have a fee. Other FSSIs also have a fee. We expect
15 not only -- I think Walter mentioned there'd be
16 savings in the pricing. You know, we have a specific
17 zone. Customers are encouraged to aggregate their
18 requirements to try and realize savings, and then we
19 also expect administrative savings to be realized. I
20 know Walter mentioned this. You know, we should have
21 reduced contract lead times. They should -- ideally,
22 customers will be issuing fewer contract actions.

23 Can the contractor charge a G&A fee to the
24 customer for the time and effort for all the reporting
25 that will be required as part of invoicing all in CAF

1 payments? No. Language indicates five years with
2 option to extend. Does this refer to the task order
3 or the main BMO contract that previously mentioned 10
4 to 12 years? That refers to the main contract.
5 Again, if it's unclear, that's one of the places where
6 we said 10 and not 10 to 12. We're gonna clarify
7 that.

8 This is from Section H. It's talking about
9 the minimum task order awards or estimated value. It
10 says is the maximum total estimated value for the base
11 period \$100 million? It seems like there might have
12 been confusion on this. There's no maximum ceiling.
13 The area that talks about the \$100 million value --
14 and Josilyn, I don't know if you want to try to
15 explain this -- that's what we're looking for in terms
16 of minimum --

17 JOSILYN REED: Minimum.

18 JANET SCHWEER: Task order.

19 JOSILYN REED: So basically when we're
20 determining the option, we're looking for you to have
21 at least five -- that's a section where we're looking
22 for you to have at least five task orders or task
23 orders that totals \$100 million. So it's basically
24 just a minimum task order that we're looking at, and
25 they'll be used for the purpose of when we're

1 determining the option.

2 JANET SCHWEER: Thank you. So there's no cap
3 or ceiling on the entire vehicle where we get to a
4 point and then it's, it's done.

5 There was a question about the numbering
6 referring in Section H, so we're gonna review the
7 numbering and it'll all be different. Not completely
8 different, but we're gonna make sure that everything's
9 cross-referenced correctly. We talked about the
10 minimum task orders and the estimating value. There
11 was a question about the conflicts of interest
12 section. Would you please clarify the first paragraph
13 under the header, and I didn't have that. This is the
14 conflict of interest language. I remember what the
15 question was. It talked about being a prime. If you
16 are a prime contractor on this vehicle, could you be a
17 subcontractor to another prime performing work on the
18 same one? And it says that is acceptable.

19 What is the process or time frame for
20 issuance of government IDs? Again, that would be
21 determined at the task order level. There was a
22 question about -- under the dormant status section
23 about what other requirements to be considered high
24 performing. We couldn't find the language that said
25 high performing in that section. The requirement

1 would be just to be in compliance with the terms and
2 conditions of the contract. The intent of the dormant
3 status is to make sure that all of the contractors
4 that are on this vehicle are active and participating.
5 We don't wanna get into a situation where we have 10
6 contractors who have never been on anything, so that's
7 where -- that's what that is there to help.

8 Another question asked about a schedule for
9 the open season and what the evaluate factor
10 subfactors that are referenced. We don't have a
11 schedule for the open season. That's something that
12 would be depending on the needs of the program, as
13 Josilyn mentioned earlier, and the evaluation factors
14 would be the same as the original RFP.

15 The next is from Section L. Since the offer
16 has to submit only one proposal to compete in both
17 service groups, will this also be true to compete in
18 additional zones. Yes, we imagine that would be true.
19 As we mentioned earlier, we are intending to have
20 similar -- basically the same structure. We may have
21 to make slight changes depending on the needs for the
22 agencies in the zone. But yes, it'll be also true.
23 Will there be separate criteria written for the small
24 business pool with regard to past performance
25 requirements? For example, will the two projects per

1 state of Zone One requirement apply to small business
2 applicants? Josilyn, I don't know if you wanna
3 address this. I think what we discussed was if you
4 industry have feedback on that, we would like to hear
5 it.

6 JOSILYN REED: Yes, we are. We are
7 identifying varying elements that, you know, may not
8 apply to the small business, so this potentially could
9 be an element that we, you know, may reduce the number
10 on and perhaps look into that. So this is -- like
11 Janet said, we're looking for, you know, feedback. If
12 small businesses feel this is, you know, an evaluation
13 factor that, you know, something that can't be met,
14 we're looking for that kind of feedback, so there will
15 be a variation of evaluation factors that may vary
16 between the two different solicitations.

17 JANET SCHWEER: Also, keep in mind for this
18 answer that if you don't have a list -- as Josilyn
19 mentioned earlier. If there's not -- you don't have a
20 list of projects for each state, you can also submit a
21 narrative to explain how you would cover offering
22 services in those areas.

23 Does GSA have an estimate of how many awards
24 per IDIQ contract will be made? We said our goal is
25 to make enough awards to provide sufficient

1 competition at the task order level. We have to make
2 sure that our customers are getting enough bids on
3 each task order they're putting out so they can meet
4 their competition requirements. Today we don't
5 necessarily have an estimate, but we will have that
6 when we release the final RFP of how many contract
7 awards there will be.

8 We moved onto Section M now. There was a
9 comment that there was no mention of mentor-protege
10 relationship, and can an explanation of what is
11 allowable under a mentor-protege relationship be
12 provided in the same detail as subcontractors,
13 affiliates and divisions? So we're gonna be
14 researching that, and we'll have that updated in the
15 final.

16 We had a couple questions about joint
17 ventures that we're gonna try and clearly explain
18 here. One was company A and company B form an SBA
19 mentor-protege joint venture. Company A is the
20 protege and managing member of the joint venture. The
21 joint venture is awarded several contracts over the
22 years. So it's existing. As Josilyn was mentioning
23 earlier. The joint venture's already existing. Can
24 Company A use the contracts that were awarded to the
25 joint venture for relevant project experience? So if

1 only Company A was submitting under this vehicle,
2 could they use the experience of the joint venture?
3 And our answer to that was yes.

4 Kind of a similar question. For an SBA
5 approved joint venture, is the requirement that all of
6 the previous contract submitted as relevant experience
7 or past performance must have been performed by the
8 joint venture? We're gonna research that. I'm not
9 sure if we clearly defined that in the draft, so we're
10 gonna research that and see if we can more clearly
11 define it in the final as far as if it is a joint
12 venture, what is acceptable use of past performance.
13 We address -- will the small business applicant be
14 required to submit a subcontracting plan? No. Only
15 other than small would be required to submit a
16 subcontracting plan.

17 Past performance. Why are past performance
18 surveys required if information on contract is
19 available in the PPIRS or CPARS database? Again, for
20 those of you who may not be familiar with those, those
21 are the reporting past performance systems that the
22 government uses to enter information about completed
23 contracts or some of them ongoing. So shouldn't the
24 requirement be if the CPARS does not exist, then you
25 have to provide a past performance survey? In some of

1 our discussions with customers, we learned that
2 sometimes they require both the CPARS and a separate
3 past performance survey. It's possible that the past
4 performance survey may ask questions that you may be
5 able to find answers to in the CPARS, but we'll take
6 those into consideration and see if we need to revise
7 those requirements in the final.

8 I believe Josilyn covered this earlier. To
9 clarify, can one project be used to cover both service
10 groups, O&M and the Facility Support Services, and
11 that answer would be yes. You would need to make sure
12 that you're telling us which specific services are
13 included in that project. So if you had a large
14 project and you provided everything that's up on that
15 board, that's fine. That could be one project for all
16 of that. Make sure that you're telling us what
17 services that you're intending that to include. Don't
18 just tell us oh, I provided complete facilities
19 maintenance for five buildings in Virginia. We need
20 to know what specific services were provided.

21 Again, we had some other questions about the
22 project locations, and there was some confusion about
23 how many projects were required. Again, we're not
24 saying that you have to have -- we have to have three
25 for each service. But if you have three projects that

1 cover all of these services, then you only have to
2 submit three projects. But if you have three that are
3 HVAC maintenance and one for each of the other ones,
4 then you'll have to submit three for each of the
5 service groups. Trust us. We don't wanna review any
6 more than we absolutely have to either. So if you
7 have some that cover more, that's awesome.

8 Regarding the deviation of project location
9 request, can you elaborate on what would be required
10 to demonstrate an offer's capability to provide
11 service coverage for Zone One? So Josilyn mentioned
12 that if you don't have or can't show that you've done
13 projects in all of the states, two projects in all of
14 the states, you can provide a narrative to explain to
15 us how you think your company can cover or provide
16 service in all those areas. We're gonna look into
17 that and we'll see if we can provide some further
18 definition of exactly what we're looking for and would
19 be evaluated as part of that in the final.

20 Please clarify the role of resumes. Are you
21 looking for resumes of corporate personnel? Please
22 define what and who are key personnel. We're gonna
23 look into this some more. We think we used some
24 language from existing customer requirements, but
25 likely it would be employees in management positions

1 over the key areas.

2 We're almost done with the ones we received
3 ahead of time, I promise. How will this initiative
4 impact our current GSA contract? So this is from a
5 current GSA Schedule 03FAC contract holder. As I
6 mentioned, this is a completely separate contract.
7 It's a completely separate requirement. It has
8 different contract ordering types available. If
9 you're familiar with Schedule 03FAC, this does not
10 cover everything that's offered on Schedule 03FAC.
11 They have probably eight other energy services
12 categories. There's dry docking services. There's
13 application of chemical compounds. There's other
14 services that Schedule 03FAC covers. And of course,
15 it is a nationwide contract. So right now, this is
16 only for Zone One. As far as impact to a current GSA
17 contract, we really couldn't tell you for sure. I
18 mean, it would be up to the ordering contracts office
19 whether they want to continue to procure those
20 services via schedule or if they wanted to move it to
21 BMO. It would also depend, obviously, on where they
22 were located. This isn't gonna be available in Texas
23 by October, you know, so it's kind of hard to gauge
24 that without a more specific knowledge of, of this
25 company's current service under that.

1 Will we have to modify our current GSA
2 contract to conform to this initiative? No. This is
3 a separate vehicle. You have to submit a separate
4 proposal to be evaluated and competed. Will federal
5 agencies still procure janitorial services alone off
6 of GSA Schedule 03FAC? They will still have the
7 ability to do so. Again, it's up to the ordering
8 agency to determine what best meets the needs for that
9 agency and how they want to procure those services.

10 This company says since we only provide
11 janitorial service, will we have to team up with other
12 contractors who provide the BMO services that we do
13 not provide? This is kind of a tricky answer. Yeah,
14 if you only provide janitorial services, you're not
15 gonna qualify. You have to have at least two of the
16 required services. As far as teaming up with another
17 contractor, it kind of goes back to Josilyn's
18 statement about a joint venture. You'd have to have a
19 joint venture in place in order to submit a proposal.
20 It's not like schedules that have teaming
21 arrangements. If there's more specific questions on
22 that later, we can try and answer it. Otherwise,
23 that's the best answer I can probably give right now.

24 Are schedules of deductions determined by the
25 site or is there a common BMO standard? This would be

1 determined by the site at the task order level. There
2 is a question about any protest language covered in
3 the RFP, and Josilyn assures me this is in Section 1.
4 Sorry, Section I. It's already in there.

5 Do you have to be on the Schedule 03FAC to
6 submit a proposal under the solicitation or is this
7 open to everybody? Again, no. This is not a BPA off
8 schedule. This is open to everyone, as long as you
9 can meet the service requirements. Okay. That does
10 it for the questions we received ahead of time, and
11 now we're gonna open it up. Mary?

12 MARY SNODDERLY: Okay. Let's open it up. I
13 see Joe, your hand went up very quickly. What --
14 again, please state your name and your company so we
15 can get it on record, and then we'll pass it along to
16 the panel to answer the question.

17 MAN: Jerry Tate, Rosemark. We're a small
18 business. Is there any concern that -- the feedback I
19 get, I noticed a lot of decline in GSA schedule large
20 contracts. There's a lot of decline in what's coming
21 out. And I don't know if the revenue dropped or not,
22 but the feedback I get from agencies is that they feel
23 like they're paying way too much or the contractor's
24 paying the fee and they have to pay a fee to the
25 government, and yet I see that you've raised the fee

1 from .75 percent to 2.5 percent. Is there a concern
2 that you're raising so many fees here that this
3 vehicle will not be adequately used?

4 MARY SNODDERLY: Anybody want to field that
5 question? I'm not sure who on the panel. Josilyn?
6 Walter, you may have something to add as well.

7 JOSILYN REED: Well, I know that -- I think
8 the .75 you mentioned is for the schedules program.
9 But typically with the Federal Strategic Sourcing, the
10 standard has been the 2 percent. And so I -- you
11 know, I know that research has been done to determine
12 that this fee was reasonable, a reasonable fee in
13 accordance with, you know, to run the programs, and
14 the savings included with, with the program will
15 offset the fee. Walter may be able to provide a
16 little more information with this.

17 WALTER ECKBRETH: I'm not sure the 2.5.
18 Yeah, the big difference between especially the
19 Federal Strategic Sourcing Initiative contract
20 vehicles and the schedules, there's a lot more
21 intensive management of all the contracts, day to day
22 contract management that we don't necessarily have in
23 the schedule world. So it's more it's more expensive
24 for us, whatever agency is running it, to operate.
25 And to the question of, you know, might the fee impact

1 usage, certainly if, if the vehicle doesn't have a
2 value to the agencies, if the pricing -- if the
3 pricing out of the box isn't good, you know, agencies
4 probably will not use it. I mean, that's part of the
5 evaluation that Josilyn's team is gonna have to do
6 once they get through all the technical hurdles.
7 They're then gonna have to look at the pricing, and
8 they're gonna have to compare the pricing against
9 current government pricing. Thankfully, we've got the
10 commodity team sharing some of their current contract
11 prices. You know, it's a hard balancing act. If the
12 value's not there, then we probably have spent a lot
13 of time to ask ourselves do we go forward and have
14 contracts that people aren't gonna use, but we think
15 there's a lot of value to the program, the data that's
16 there for the agencies on their usage and the value
17 that we're seeing there.

18 MAN: Can I ask a question of a question?
19 Gaghan Mechanical out of Washington, DC. That fee
20 that you're talking about, can it be funded -- say,
21 for example, it's common in commercial business to
22 early pay discounts, sometimes up to 2 percent. Can
23 it be funded that way if we deal with the government?
24 Can you back fund it?

25 MARY SNODDERLY: That may be something we

1 have to research.

2 WALTER ECKBRETH: I mean, this is
3 something -- it's built into your pricing and it's --
4 for all intents and purposes, it's invisible to the
5 customer. I, I, I don't -- you know, agencies aren't
6 gonna pay earlier --

7 MAN: No.

8 WALTER ECKBRETH: -- in advance.

9 MAN: I'm just wondering if it's something
10 that can be an avenue that opens it up to others. It
11 opens up more contracts to those are a little leery
12 about paying fee to be able to use this avenue of
13 getting contracts.

14 WALTER ECKBRETH: From a customer
15 perspective, I mean --

16 MAN: I mean, basically --

17 WALTER ECKBRETH: From a customer perspective
18 appropriation law, they can't pay for things until
19 service has been rendered.

20 MAN: I understand that.

21 WALTER ECKBRETH: From a contractor, that's a
22 direct pass-through. As you do billings, you receive
23 the money, and that's when it's due to be remitted to
24 the government.

25 MAN: I was just thinking of another option

1 that may be out there.

2 MARY SNODDERLY: I saw some other hands go
3 up.

4 MAN: James Conniff, Fire and Safety America.
5 Will you guys be sharing the list of attendees for
6 each of these industry days?

7 JANET SCHWEER: We'll talk about it. I
8 haven't thought about that yet.

9 MARY SNODDERLY: We will discuss that and
10 make sure that -- I think we just want to make sure
11 that it's okay for everybody to share who is here. I
12 mean, we just -- we'll talk about it. We'll let you
13 know. We'll have to find out whether we can do that
14 or whether we have to keep it internally. I seen --
15 yes, sir.

16 MAN: I'm Mike Ford with Crockett Facility
17 Service. How will this be promoted to the agencies,
18 the BMO buying format?

19 MARY SNODDERLY: Oh, that's a very good
20 question. I think maybe I can even partially answer
21 that one. Actually, it's gonna be done a number of
22 different ways. One thing that you heard us talk
23 about, our interagency commodity team that we have,
24 and that's part of their job is to promote within.
25 Okay? We are going to prepare an ordering guide. We

1 are gonna have training sessions that will allow --
2 and Josilyn, I think you mentioned the delegation of
3 authority. What -- for an agency to utilize the
4 contract, this is very similar to a GWAC. They're
5 gonna have to request delegation of authority, which
6 is gonna require some training, so -- and then we have
7 our whole customer service network that GSA has out
8 there. Obviously, we will train them, and they will
9 be out promoting the program. We have our websites.
10 I mean, there's just a number of different ways that
11 we will go out and promote.

12 WALTER ECKBRETH: One other piece in there.
13 Also, Management and Budget is looking at as part of a
14 new initiative for category management identifying
15 best in class contracts. Office of Management and
16 Budget is starting to go agency by agency and identify
17 specifically in the Federal Strategic Sourcing
18 Initiatives identifying with them what their current
19 spend level is as opposed to what it appears the
20 agency's budget or addressable spend is and is going
21 agency by agency to ask okay, what are you doing and
22 what are you doing outside of established contracts.
23 You know, just one more effort to try and stem the
24 tide of duplicative contracts.

25 MAN: Say an agency in Zone One, they decide

1 to utilize the BMO. Will they handle the procurement
2 or will they handle that and turn that over to your
3 team?

4 MARY SNODDERLY: They will handle the
5 procurement at the task order level. They will be
6 issuing a task order against the parent contract.

7 JANET SCHWEER: Or they could use the
8 assisted acquisition.

9 MARY SNODDERLY: Yeah. You want to talk
10 about that?

11 JOSILYN REED: So the agencies can -- as Mary
12 mentioned earlier, they can handle the task order at
13 their level. Or if they want GSA to handle it, we
14 have assisted acquisition services in varying regions
15 to where they can basically procure these services
16 through the assisted acquisition service.

17 JANET SCHWEER: But no, it's not gonna go
18 through us.

19 MARY SNODDERLY: BMO team is not.

20 MAN: Dan McWhorter, Sodexo. The pricing
21 that you're asking for on the base contract on the
22 proposal, is that maximum pricing levels?

23 MARY SNODDERLY: I'm gonna let -- Janet's
24 gonna answer that one.

25 JANET SCHWEER: Yes, it will be maximum

1 pricing levels. If -- I think -- are you a schedule
2 holder too? It will be a little bit different than
3 that. You know at the schedule level, we have maximum
4 fully burdened rates. And then if you're in an area
5 where the Service Contract Act wage determination is
6 less, you would decrease your prices. We are not
7 intending to necessarily have such a setup with this
8 because even if we have maximum rates that are based
9 on Service Contract Act, you get into a building where
10 you have collective bargaining agreements, you're
11 gonna be paying twice that easily for those minimums.
12 So we have to come up with a way to account for that
13 whether it's just, you know, deciding on where the
14 G&A, the overhead and the profit are for your company
15 and then you're changing the base rates, you know,
16 depending on where you are, that's kind of -- I mean,
17 if, if anybody has a great idea for how this setup's
18 going to work. I mean, Josilyn and I have ideas of
19 what we think are gonna work, but we've talked to a
20 lot of customers about it, and they all tell us their
21 great questions.

22 MAN: So when you go in -- let's say you go
23 through the first round, you get awarded a contract
24 and then you go to the task order level. What's
25 required for the base contract in terms of pricing

1 when you're pricing at the task order level? Is it
2 gonna be whatever you specified for you overhead and
3 your fee or is it the total max price or is it max
4 price adjusted by the wage determination?

5 JANET SCHWEER: I mean, so at the task order
6 level, your customers could be requesting, you know, a
7 lump sum amount. At our parent level, if we said
8 okay, you told us your G&A is 50 percent, your
9 overhead's 100 percent, your profit's 10 percent, then
10 basically those are the percentages you would be using
11 to come up with your task order level pricing whether
12 you're coming up with a lump sum amount, you're taking
13 into account your labor categories. Walter, sometimes
14 you have a better way of explaining this than I do.
15 Do you have anything to add to that?

16 WALTER ECKBRETH: No.

17 JANET SCHWEER: I mean, we're still kind of
18 working out some of the details on that, but that's
19 what we're imagining because we know the base rates
20 are what's gonna change depending on where you are.
21 At the task order level, that ordering CO is gonna
22 tell you what wage determination you're using or
23 determinations you're using. So if they're asking for
24 labor hour or time material rates, then that's -- you
25 would use that to come up with your labor category

1 rates.

2 MAN: I would think your fee -- a lot of
3 times, your fee changes based on risk and the scope
4 that's within the contract. And so right up front,
5 you're asking the fee to be fixed when you really
6 don't know the scope that you're gonna be bidding on
7 in the future.

8 JANET SCHWEER: You don't know the specific
9 scope, but you know these services. I mean, it's a
10 general scope. If -- you know, if there's a
11 situation, do we -- I think we might even have
12 language in that that says if there's a situation at
13 the task order level where's something that was
14 unforeseen kind of in the general scope, something
15 that would substantially increase risk, I think
16 there's something in there. Maybe not. I remember
17 seeing something about negotiating different prices
18 for contingency factors. I mean, we'll take that into
19 consideration. I know we've done research to say that
20 really the profit shouldn't necessarily change unless
21 it's a different profit center at your company, but we
22 also have to have a standard way to evaluate pricing
23 at the parent contract level. So that's kind of our
24 dilemma is we have to have a way to make an apples to
25 apples comparison and do a fair and reasonable price

1 determination, so does the ordering contracting
2 officer.

3 MARY SNODDERLY: Jerry?

4 MAN: My next question will be a little
5 easier.

6 MARY SNODDERLY: Please, even if you've asked
7 a question, please state your name and company.

8 MAN: Jerry Tate, Rosemark. I've been a
9 schedule holder for about eight years, and the most
10 confusing thing in the schedule for contractors and
11 contracting officers with task orders and BPA is the
12 wage determinations. In this future BMO, will the
13 wage determination increases and all wage
14 determination issues, will that be handled by the BMO
15 or the task order CO? There's a lot of confusion out
16 there in this whole matter, and how are you guys gonna
17 handle it?

18 MARY SNODDERLY: We're gonna have to research
19 on that one. And we'll, again, post -- questions we
20 can't answer will be posted to InterAct, so we'll
21 definitely get that answered. Thanks, Jerry.

22 MAN: Follow-up question regarding wage
23 determinations. Are you guys anticipating in your
24 final proposal to have a sample, here's a sample? How
25 are we gonna bid a sample? Here's a sample building?

1 Are you going to have multiple wage determinations for
2 all the counties? How are we gonna bid this process
3 as far as the wage determination process?

4 JANET SCHWEER: We're talked about doing a
5 sample building to have this -- you know, based on
6 this, what would your pricing be. Yeah, we're talked
7 about doing that. We've talked to some of our
8 customers. I know that some of them do it that way
9 when they're trying to do an evaluation for delivery
10 in a, you know, wide geographic area. So yes, we
11 welcome those. You wanna give us suggestions on how
12 you've seen it done? You're welcome to give us those.

13 MARY SNODDERLY: Other questions?

14 MAN: Will the sample -- Mike Ford with
15 Crockett Facility Service. Will the building be a
16 fictitious building or will it be an actual building
17 that a bid tour will be conducted and it will be real
18 personnel, real services, real assessment of what the
19 mechanical equipment in the building is or will it be
20 something that's fictitious?

21 JANET SCHWEER: I would say it will be --
22 well, not maybe fictitious. There wouldn't be a site
23 visit or anything like that. We don't anticipate
24 doing that, so it would be based on a description.

25 MARY SNODDERLY: Lots of hands going up. I

1 saw the one here in the back, and then we'll come up
2 front here.

3 MAN: Dan McWhorter. Can you clarify the
4 number of past performance surveys that would be
5 required? Is it for every project that you're
6 referencing for this whole list?

7 MARY SNODDERLY: We'll let Josilyn answer
8 that one.

9 JOSILYN REED: So yeah, so we understand that
10 could be -- you know, we could get as little as three
11 projects or we could get as many as, of course, three
12 per service offering. So in the RFP, it says I think
13 10 is where we cut it off. So if it's -- we basically
14 are looking for, you know, no more than 10, you know,
15 depending on how many projects you're gonna present
16 like if you're offering single or your project covers
17 multiple, so we do cut it off at 10. And it states
18 that in the draft RFP, so sorry for not mentioning
19 that earlier.

20 JANET SCHWEER: And again, that's for the
21 past performance surveys, not for the projects.

22 JOSILYN REED: Right.

23 MARY SNODDERLY: Yes, sir?

24 MAN: Ray Cullen, Hensel Phelps. You've
25 mentioned that there's \$1.5 billion of addressable

1 spend in Zone One. Is that on a 12 year, 10 year or
2 an annual basis?

3 MARY SNODDERLY: Actually, I think that was
4 FY '13 data. Annual, so that could vary. And it
5 was -- like I said, it was Fiscal Year '13, which
6 means that it was a certain year in time, so that
7 could vary by year, even. Yes, ma'am?

8 WOMAN: Marge McCann, Sustainable Facilities
9 Management. Several of your presentations have
10 mentioned task order solicitations. Is it your
11 expectation that the agencies will issue RFPs
12 competitively under this prime contract or will they
13 merely select one holder of the prime contract to
14 award something?

15 MARY SNODDERLY: I'm going to let Josilyn
16 answer that one.

17 JOSILYN REED: So to answer your question,
18 basically yes. It is -- they will issue -- you know,
19 depending on their need, it would be an RFP or an RFQ
20 under the parent contract. So basically, it would
21 look that they would issue it to the companies awarded
22 under the parent contract. And I guess this is a good
23 time to definitely mention that I wanna clarify the
24 parent contract versus the task order contract. So
25 our parent contract is the BMO, so all the services

1 listed under that you see in the scope of services.
2 And at the task order level, it will be, you know,
3 direct to the actual what they're looking for. So
4 they may want, you know, only certain services. It
5 may be a direct lead to a building, so that is the
6 difference. But yes, your question is correct. It
7 will be that they will issue RFPs or RFQs under the
8 multiple or IDIQ contract.

9 WALTER ECKBRETH: I mean, and Josilyn
10 maybe -- Josilyn mentioned it early on when she was
11 talking that the ordering procedures are going to
12 follow the Federal Acquisition Regulation 16.505. And
13 so what 16.505 requires is that against a master
14 contract vehicle like this, multiple award contract
15 vehicle that agencies must give a fair opportunity.
16 So yeah, basically everything over \$3,000, agencies
17 are gonna have to go out and do a task order
18 competition.

19 MARY SNODDERLY: Yes, sir?

20 MAN: Ray Cullen, Hensel Phelps. On the task
21 order competition, if a pool of contractors are in
22 the, say, non-restrictive but an agency has a
23 requirement, will they be going to the full pool?

24 MARY SNODDERLY: That's basically gonna be up
25 to the agency.

1 JOSILYN REED: Yes, and that's another
2 good -- so we've mentioned the two different
3 solicitations. The agencies will have the option to
4 determine their own set-asides. So if it's an
5 unrestricted, they'll go to the unrestricted awardees.
6 If it's a set-aside, small business set-aside, they'll
7 go to the small business. If they have varying
8 socioeconomic set-asides, they will determine that and
9 it will fall under the small business awardees.

10 JANET SCHWEER: It's whatever best meets the
11 needs of the agency. They would determine that.

12 MAN: So the pool of contractors that are
13 within whichever socioeconomic group will be invited
14 to participate?

15 JOSILYN REED: Correct.

16 MAN: Follow-up question to that is will
17 there be a requirement of the BMO contractors to have
18 a minimum participation or responsiveness to the task
19 order requests?

20 JOSILYN REED: We've discussed that and we're
21 trying to find -- because we don't wanna give
22 requirements that we don't have a way to follow up and
23 provide quality control on. So we definitely are
24 discussing that element, and that's something that we
25 will follow up and clarify at a later time.

1 JANET SCHWEER: And we don't want to drive up
2 your bid proposal costs by requiring you to bid on
3 work that maybe just doesn't fit you for some reason,
4 so that's kind of why we're trying to --

5 JOSILYN REED: At this time, the requirement
6 that we definitely are seeking for is for the five
7 task orders or a task order that meets the \$100
8 million threshold by the determination of the option,
9 so that's what we're definitely evaluating at this
10 time.

11 MAN: And that's on the premise that the
12 agencies are gonna utilize this contract vehicle --

13 JOSILYN REED: That's correct.

14 MAN: -- five years to allow that?

15 JOSILYN REED: That's correct.

16 MARY SNODDERLY: Jeff?

17 MAN: Jeff Johnson. There's a lot of
18 conversation about the task order level.

19 MARY SNODDERLY: Can I ask you to speak up
20 loud?

21 MAN: There's a lot of conversation about the
22 task order contracts and then the main BMO contract.
23 If something is specifically excluded in the master
24 BMO contract, can it be put into the task order
25 contract?

1 JOSILYN REED: So basically, as long as the
2 services are like kind of highlighted and defined
3 within the scope, like if it falls -- let's say we're
4 gonna use HVAC. Say we spell out all the services in
5 HVAC. However, this is a service that is not spelled
6 out under that description. But it is -- you know, it
7 falls under HVAC, so it would still be defined within
8 scope.

9 MAN: BAS. That's how we manage our
10 buildings. That's specifically excluded in this
11 master contract, but that's how we run these
12 facilities.

13 JANET SCHWEER: It was a software part, I
14 think?

15 JOSILYN REED: So the BAS is part of
16 maintenance in the building. Actually, we list in the
17 definitions, like we list the BAS. But having -- like
18 ordering the BAS system or like the actual software to
19 the system, that's excluded, not like the, the, the
20 management that is required in the BAS system.

21 MAN: Along with his question -- Bill
22 Koneyak. It was excluded was the energy conservation
23 and water conservation, and we do a lot with that in
24 Region 3. Can that be added back into the task order?

25 JOSILYN REED: We will look at that,

1 definitely. I think that's come up more than once,
2 and we wanted to get away from like the actual energy
3 services. Like if you're familiar with the schedule,
4 all the energy services offered under that. However,
5 we do realize that energy service methods are put into
6 several of the elements of our services, so I
7 definitely say we will go back and look at that one.

8 MAN: Dennis with Energy Engineering.

9 MARY SNODDERLY: Can you speak up, please?

10 MAN: It's Dennis with Energy Engineering.
11 Under the BMO, is there only going to be two awards
12 for two contractors?

13 JOSILYN REED: No, no. It is -- there will
14 be a multiple number of awards under each separate
15 solicitation, so it will be a multiple award,
16 indefinite delivery, indefinite contract. We'll have
17 a family of awardees that would be awarded. At this
18 time, the number has not been determined, but it will
19 be multiple awardees under each solicitation.

20 MARY SNODDERLY: That's at the parent
21 contract level.

22 MAN: To follow up on it, you're saying one
23 small business and one large business?

24 JOSILYN REED: No. We're saying multiple
25 large businesses and multiple small businesses under,

1 you know, each -- basically each grouping.

2 MAN: Thank you.

3 MARY SNODDERLY: Okay. I saw some -- yes,
4 ma'am.

5 WOMAN: Marge McCann, Sustainable Facilities
6 Management. A very small point. In the projects that
7 are eligible to be cited, you list federal, state and
8 commercial. What happened to local government? And
9 if local government is eliminated, what do you about
10 the District of Columbia?

11 JOSILYN REED: That is something we will
12 clarify. I think it's intended that state is local
13 government, and so it could perhaps just be the
14 language. It's not excluded, and we will definitely
15 clarify that language.

16 WOMAN: Thank you.

17 MARY SNODDERLY: Yes?

18 MAN: Just a clarification. Dan McWhorter,
19 Sodexo. Just a clarification on the staffing plans
20 and the key personnel associated resumes that you're
21 asking for. So as I think I understand it is that
22 you're looking for the staffing plans associated with
23 the base contract and how you support that than any
24 staffing associated with the task orders, 'cause
25 obviously it'd be in the task orders?

1 JOSILYN REED: That is correct.

2 MAN: Are you requiring or is it open whether
3 that's the dedicated personnel or not?

4 JOSILYN REED: No, we're not looking for the
5 dedicated person. We're just looking for the role
6 that would be under that.

7 MAN: Thank you.

8 MARY SNODDERLY: Yes, sir?

9 MAN: Kevin, Gaghan Mechanical. I have three
10 separate questions that may or may not belong on this
11 level. It's from experience in the past, and I don't
12 know how to go forward.

13 MARY SNODDERLY: Could you ask one at a time?

14 MAN: I will ask one at a time. First one,
15 we have a problem with current jobs where we're always
16 asked for additional task orders off the contract to
17 get pricing, get pricing. It has to be priced right
18 away. We turn it in. We bring subs in to price out,
19 and then they turn around and say well, it doesn't fit
20 budget and it's not funded. Therefore, it's not gonna
21 happen, and what happens is that it impacts our
22 relationship with our subs that we've worked with for
23 years because you get this bone thrown at you all the
24 time and then they pull it away because they may be
25 using the money somewhere else. So the point to that

1 being are we allowed to contact the COR or the CO and
2 ask whether it's funded or what the budget is --
3 although that's a tightrope 'cause nobody wants to
4 know what it is -- but it creates a problem with
5 existing. And is that gonna continue to exist as we
6 move forward, even on this new platform?

7 MARY SNODDERLY: Sorry. We're all kind of
8 looking at each other. That's something we may have
9 to look at and address at a later time, and it may be
10 something we can't necessarily address 'cause it's
11 more at the task order level.

12 MAN: And I understand, and I think that's
13 where most of these questions need to go, but I just
14 don't understand because my CORs are not very
15 communicative, which creates problems in trying to
16 determine. The second one, it was brought up in one
17 of the earlier questions about the CMMS of who inputs,
18 whose responsible for it. We've been told that
19 everything's supposed to go to Maximo.

20 MARY SNODDERLY: That's a GSA contract. Now,
21 keep in mind, this BMO is government-wide. It's not
22 just a GSA contract.

23 MAN: So that falls down to the task order
24 level again?

25 MARY SNODDERLY: Yes.

1 MAN: And last, another problem we've run
2 across. You talk about experience, and we're not --
3 we haven't been in the facilities management that
4 long. We've probably only got two jobs up to this
5 point. But you ask for past experience, and we have
6 trouble with at least two of our contracts right now.
7 The CPARS are not going to the new COR. It's gone to
8 the old one. It's been ignored. We've brought it up
9 to the new one, and nothing's been done about it. And
10 push comes to shove, I've got no experience to show
11 because somewhere there's a problem with the way the
12 government's handling it.

13 JOSILYN REED: And that's why we ask for the
14 surveys in addition to using the CPARS, and that's
15 another reason why we're asking for both. I mean,
16 we're doing both. We're looking at the PPIRS as well
17 as asking for surveys for the projects because we
18 understand that there are glitches with the system
19 sometimes.

20 MAN: They're going to the wrong people.

21 MARY SNODDERLY: Okay. Other questions?
22 Jerry.

23 MAN: Jerry Tate from Rosemark. What's the
24 concept of the regionalization regarding the small
25 businesses in -- let me clarify my question. You

1 know, there are a number of small business companies
2 that are really reach out nationwide and may not have
3 two or three projects in every one of these region,
4 but they may have 30 contracts across the U.S., and
5 yet it seems like there's a real emphasis to try to
6 be -- what's the concept here? Are we trying to find
7 regional business or are I am off the chart here?

8 JOSILYN REED: So in the beginning when we
9 were building the solution, we were told by our
10 customer agencies that we like to have localized
11 business. That's meaning that if on demand we need to
12 order something, you know, we usually deal with people
13 that are local. And so we, we understood that. And
14 when we went out and sought industry feedback, you
15 know, we also got a lot of feedback well, I can't
16 provide coverage over the entire U.S., so that is how
17 we created the zonal approach by basically satisfying
18 the customer need as well as being able to, you know,
19 respond to those small businesses that can't provide
20 services across, you know, the other side of the U.S.
21 And so however, this wouldn't preclude them from
22 providing -- you know, when our next zone comes up,
23 they can still, you know, offer services under that
24 zone by, you know, being under that particular zone as
25 well, so we're breaking it into a zonal approach to be

1 able to make sure that the agencies can have that
2 localized support service that they're looking for.

3 MAN: But you're not excluding groups that do
4 have -- small businesses that do have coverage across
5 the U.S.?

6 JOSILYN REED: Correct. We're not excluding
7 them.

8 MAN: But in the way you're weighting your
9 Section M, you are doing it because you're saying
10 you're giving extra credit to those that are excluded,
11 so there's a little bit of a disconnect.

12 JOSILYN REED: I guess maybe I don't really
13 understand what you mean by how we're --

14 PATRICK: Josilyn, I think what he's saying
15 is that by not looking -- and correct me if I'm
16 restating incorrectly. By not looking at work or past
17 performance done in areas other than Zone One, we're
18 not -- we've essentially excluded him because we're
19 not gonna be accepting past performance in other areas
20 of the country.

21 JOSILYN REED: Is that the question?

22 MAN: Also, you're giving extra credit for
23 work in region, right?

24 JOSILYN REED: Correct. So the projects that
25 we're asking -- that is a good question. I'm sorry

1 for misunderstanding. The projects that we're asking
2 for, we're not asking for those projects -- so it's
3 like minimum requirements. Those projects can be, you
4 know, wherever. But to verify that they are
5 projects -- to verify that you can provide coverage in
6 that whole, you know, area of the zonal approach, we
7 ask for the list, so those are the pass fail
8 requirements. And you're right, we are giving
9 evaluation -- additional evaluation credit to those
10 companies that present, you know, the project that
11 they presented if they are in -- I'm sorry, in the
12 areas of the Zone One. So you're right, we are giving
13 the credit. However, we're not eliminating. You
14 know, we're not saying that if you don't have this,
15 you're not qualified, so it's just basically how you
16 would get scored. You may get higher in a different
17 element that another company doesn't have. So we're
18 not excluding the small businesses, and we're not
19 asking for the projects to be in that particular zone.
20 We're trying to figure out -- with the projects, we're
21 trying to figure out if you can provide the scope of
22 services with the project location and the list of
23 services. We're asking that, you know, tell us how
24 you can provide, you know, for the zonal approach.

25 WOMAN: Marge McCann, Sustainable Facilities

1 Management. If the task orders are going to be
2 competitive and if they're aimed towards small
3 business, what is the justification for requiring a
4 small business to have 18 projects in 9 states when
5 the competition will be for a specific location?

6 JOSILYN REED: So basically we want -- at the
7 parent contract level, again, we want to offer a
8 comprehensive solution. We don't know at the task
9 order level that it may be one service. It could be
10 that an agency may want to procure all of these
11 services. And so at the parent contract level, we
12 want to ensure that we are -- that we have contractors
13 that can offer a multitude of services. And so
14 like -- and that's why we have the required services
15 versus the optional services as well. So again, and
16 to kind of take you back from the research phase, you
17 know, we sought that from our customers that these
18 are -- the services that we are stating as required,
19 these are the services that customers are ordering,
20 you know, together, and so that's why we kind of
21 separated them out.

22 WOMAN: I wasn't speaking about the panoply
23 of services. I was speaking about the nine states.
24 In other words, my company can often all of those
25 services, but not in New York. We're not big enough.

1 We're still a small business. We would be able to
2 compete in the DC, Maryland, Virginia area
3 successfully.

4 JOSILYN REED: If you could definitely
5 respond, we did go out for a RFI to ensure that the
6 zone was an appropriate zone. And so if you go ahead
7 and respond to the draft RFP with that concern, that
8 is definitely something we will take in consideration.

9 WOMAN: Thank you.

10 JANET SCHWEER: Can I add something to that?
11 One of goal of Strategic Sourcing, of course, is to
12 get the customers to -- like Walter was saying -- to
13 really consider their needs, consider where they can
14 find savings. One of those ways is to possibly order
15 services from multiple locations. So part of our
16 responsibility is to make sure that we're providing a
17 vehicle where if they wanted to issue an order that
18 covered all the states that they could do that, and
19 that's why it's not broken down even further, so we
20 are trying to balance a lot of interests. But like
21 Josilyn said, definitely send us your comments on
22 that.

23 PATRICK: It seems like maybe there's a
24 little bit of disconnect between the projects that
25 we're asking them to provide or the examples we're

1 asking them to provide in the different states of Zone
2 One as opposed to the past performance examples that
3 we're asking them to provide to show that they can
4 actually do the work. Can you maybe explain that a
5 little bit?

6 JOSILYN REED: Sure. So the projects are
7 we're looking for three projects per service, and so
8 basically I'm looking for three projects that show me
9 that you can provide the HVAC maintenance. You can
10 provide janitorial.

11 MARY SNODDERLY: They can be anywhere.

12 JOSILYN REED: Those can be anywhere. Those
13 can be anywhere, you know, in the United States.
14 These are the projects that you are presenting to show
15 us that, you know, you can offer the services
16 identified.

17 JANET SCHWEER: That's the relevant project
18 experience.

19 JOSILYN REED: Relevant project experience,
20 and so it highlights all the other things that we
21 would be looking into the relevant project experience,
22 but we're not designating states in that relevant
23 project experience. So a separate section is we're
24 looking for a list of projects, and these are not
25 relevant projects. This is just a general list.

1 Basically, if I'm envisioning the list, it's gonna say
2 DC, you know, Department of Army, you know, project
3 number XYZ 21 whatever, and that is all. We're asking
4 for a list of 10 projects to demonstrate -- did I say
5 10. I'm sorry. But we're looking for a list two
6 projects per -- I apologize -- two projects per state
7 for all of the area of Zone One, so we just are trying
8 to determine that you have the capability of providing
9 coverage for that entire area. And within that, if
10 you don't have the projects, we did provide for a
11 deviation that you would be able to just present us with
12 a verbiage on, you know, although I don't have a list
13 of projects, I am able to -- you know, my company, you
14 know, is able to commute to, you know, this area to
15 provide coverage for that.

16 So those are the two different, and I think
17 where it gets confusing is that we would give
18 additional evaluation credit if one of the projects,
19 your relevant project experience that you submitted,
20 fell within multiple areas of the Zone One, so it's
21 not a pass-fail requirement. However, you do get
22 additional credit if that happens. Again, it's not a
23 pass-fail requirement. It's not saying that you will
24 be not rated highly for that. It's just that we would
25 give additional credit for that, so I hope that

1 explain it.

2 MARY SNODDERLY: Okay. Other questions?

3 Yes.

4 MAN: Ray Cullen, Hensel Phelps. Question on
5 the contractor team arrangement. If -- it indicates
6 or seems to stipulate in the draft at the moment that
7 experience only from the entity is acceptable, not
8 from the prime members. Is there a consideration for
9 a waiver of that?

10 JANET SCHWEER: That's one of the -- we got a
11 similar question like that ahead of time, and we're
12 gonna research that a little bit to make sure that our
13 language is clear on what we're gonna require and see
14 if we need to adjust what's in the draft.

15 MAN: Follow up with that. If there was to
16 be a contractor team arrangement made specifically for
17 BMO where one entity is gonna take care of the O&M
18 work that they could provide their experience
19 associated with O&M, but there's another team member
20 that specifically deals with facility support service,
21 that they can go and use that. I think it would be
22 maybe in the benefit of the government to consider
23 that.

24 JANET SCHWEER: I'm not sure. Walter, maybe
25 really what we're talking about in ours are joint

1 ventures, and teaming arrangements would be -- that's
2 something that's used under the multiple awards
3 schedules. I don't know that there's necessarily a
4 definition of teaming arrangements for something
5 outside of that.

6 WALTER ECKBRETH: No. In the FAR 9.6 where
7 it talks about contractor teaming arrangements, that's
8 where we would be here, which is a joint venture. I
9 think we've got language in there on existence of
10 joint ventures and the past performance of the joint
11 venture.

12 MAN: You also have reference to
13 partnerships. Is it gonna be more than just a joint
14 venture, but a legal entity?

15 WALTER ECKBRETH: Yes.

16 MAN: So whether it's a joint venture, a
17 partnership or an LLC?

18 WALTER ECKBRETH: Yes.

19 MAN: Entity that's already in --

20 JOSILYN REED: Yeah.

21 MAN: Thank you.

22 MARY SNODDERLY: Jerry?

23 MAN: Jerry Tate, Rosemark. Can a small
24 business use a large business as a subcontractor under
25 the small business set-aside.

1 MARY SNODDERLY: Yes. Everybody's up here
2 shaking their head.

3 WALTER ECKBRETH: With the limitations of
4 subcontracting.

5 MAN: And how would that affect the past
6 performance? In other words, would only the small
7 business prime be used as past performance or would
8 you use the big business that's the subcontractor?

9 JOSILYN REED: We would use the prime. So
10 yes, we would use the prime contractor.

11 MAN: So even though he had a large business
12 as a subcontractor, you couldn't use that?

13 WALTER ECKBRETH: Nope.

14 MARY SNODDERLY: I apologize. We only have
15 one mic. Unfortunately, that's all this room had, so
16 we're kind of having to do the shuffle up here.

17 MAN: Dan McWhorter, Sodexo. So is there a
18 minimum dollar amount for task orders, like \$100,000,
19 \$200,000?

20 JANET SCHWEER: In the draft right now, it
21 says Simplified Acquisition Threshold is \$150,000 is
22 the minimum. That's one of area that we're looking
23 for feedback on 'cause that seems kind of high to us.
24 That's kind of our starting point. For facility
25 maintenance work, we think that seemed high. There

1 might be a lot of agencies that had requirements that
2 were significantly less than that. So if you have
3 feedback on that, please send that to us on what you
4 think is a reasonable minimum order. \$10,000, for
5 example.

6 MAN: Last question, I promise.

7 MARY SNODDERLY: Jerry, that's fine. Please
8 ask.

9 MAN: What the heck is a self-scoring
10 worksheet? What is that?

11 JOSILYN REED: That is a process that it was
12 originally created or developed in the OASIS. I'm not
13 sure if you're familiar with the OASIS Acquisition.
14 But basically, it's just a process of verifying how
15 you think that you're rated in this element. So, you
16 know, it will show a score. It'll say, you know, in
17 this element -- you know, basically it's a self-
18 examination to make sure that, you know, you're
19 offering the -- you know, the most valuable offer when
20 you're scoring yourself. So we're giving you the
21 opportunity to score yourself and then evaluate it
22 against how the government -- so feel free to provide
23 feedback on that.

24 MARY SNODDERLY: For those not familiar with
25 OASIS, it is for professional services. While it is

1 considered a Strategic Sourcing, it is not an FSSI.
2 And it's an acronym, and I apologize. I don't exactly
3 know what the acronym -- I know I've heard it, but I'm
4 looking at Walter. He's looking at me, too.

5 JANET SCHWEER: One Acquisition Solution for
6 Integrated Services.

7 MARY SNODDERLY: There we go.

8 WALTER ECKBRETH: You win the prize.

9 MARY SNODDERLY: Okay. Other questions?

10 JANET SCHWEER: I did want to clarify a
11 little bit back on the pricing issue. We have --
12 there's kind of two separate prongs to this. At
13 parent contract level, we have to get some kind of
14 pricing information from you all in order to make our
15 evaluation, our price analysis if it's fair and
16 reasonable pricing. At the task order level, that
17 ordering contracting officer's gonna make a
18 determination of whether your pricing that you're
19 proposing for whatever specific buildings or sites
20 that they have is reasonable, too. So we have to come
21 up with something for our purposes to see if your
22 pricing is generally fair and reasonable. At the task
23 order level, they may ask for lump sum pricing, and
24 they're gonna have different or specific buildings in
25 there that may ask for pricing by the building. They

1 may ask for a square foot price. Whatever pricing
2 we've -- you've proposed at the parent contract level,
3 you would use to come up with that price. And again,
4 you have comments on that, suggestions on that, please
5 send them in to us.

6 MARY SNODDERLY: Okay. Any last questions?

7 MAN: Ed Neilan. Is the expectation that
8 this takes off and gets, you know, easily rolled
9 out -- is this intended to take the place of Scheduled
10 Pricing, GSA Advantage, Ebuy, that?

11 MARY SNODDERLY: Well, now keep in mind when
12 you say Ebuy, I suppose it could be part of Ebuy. I
13 mean, that's not just specifically schedules, so it
14 could be part of that. But is it meant to replace
15 schedules? We'll kind of address that. No. I mean,
16 we talked about the scope is different
17 for particularly 03FAC, which is the main schedule
18 that would fall under this purview. The scope is
19 different. There's a lot of things that are
20 different.

21 JOSILYN REED: Just to piggyback on that.
22 Mainly one thing that -- you know, the big difference.
23 FAR Part 8, you know, governs the schedule, and so
24 there are limitations on FAR Part 8. We've heard from
25 our customers that FAR Part 8, you know, offers too

1 many limitations. This is why -- you know, this is
2 another, you know, variation of the vehicle. It's
3 because this is a FAR Part 15 procedure.

4 MAN: 16.

5 JOSILYN REED: Ordering procedures. FAR Part
6 15 negotiations. Are you gonna quiz me on the FAR
7 later?

8 PATRICK: Another big difference -- and
9 Walter, maybe you can address this a little bit
10 more -- is the commitments for FSSI versus schedules.

11 WALTER ECKBRETH: Sure. So the intent with
12 the Strategic Sourcing Initiatives, as we've talked
13 about, we bring the agencies together to develop a
14 solution. And then once the agencies have identified
15 and created that solution, we then ask the agencies.
16 OMB asks the agencies to commit, to sign up to run
17 some business through them to make them of value. Of
18 course, you know, the commitment still is dependent
19 upon the awarded contracts being good contracts with
20 good pricing and good service and good contractors.
21 But that's a very big, big difference to the old GSA
22 schedule where come one, come all, everybody gets
23 their hunting license and then you gotta go out and
24 figure out where the field is and figure out what
25 animal you're hunting and what kind ammo you use and

1 all that stuff. Hopefully, it's more like shooting
2 fish in a barrel.

3 MARY SNODDERLY: Okay. Questions? We've had
4 some great feedback. We appreciate the questions.
5 Okay.

6 Eric, if you could go to the very last slide,
7 we'll get there. I promise. There we go. This
8 e-mail address up here, this is the best e-mail
9 address to contact us. Our entire team has access to
10 this. That way, if one of us happens to be out of the
11 office, somebody else would be able to take a look at
12 it and to be able to address your question. This is
13 also the address I believe that Josilyn used in the
14 draft RFP, so any comments should come in to this
15 e-mail address.

16 Now, let me just kind of in closing tell you
17 that we do have the registration list. And if your
18 e-mail is on there, which we asked for in the
19 registration process, I will e-mail out the slides
20 that we used today and I will also e-mail out this
21 address, e-mail address again, and then I will e-mail
22 out the web link to our Interact site, just in case
23 you don't have that. Hopefully, you are all on it.

24 If nothing else, thank you very much for
25 coming. Thank you very much for the feedback, and we

1 look forward to hearing more from you.

2 (The meeting was concluded at 12:14 p.m.)

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C E R T I F I C A T I O N

I, Vicki Nunan, Court Reporter, certify that the following is a true and accurate transcript of the foregoing meeting.

I further certify that I am neither attorney nor counsel for, not related to nor employed by any of the parties to the action in which this meeting was taken; further, that I am not a relative or employee of any attorney or counsel employed in this, nor am I financially interested in this action.

VICKI NUNAN
Court Reporter and Notary Public