Professional Services and Human Capital Categories
New Services IDIQ

RFI Industry Day

April 1, 2021
RFI Industry Day

Reminders

● This meeting is being recorded for the purpose of sharing the presentation for those unable to attend

● A recording of the presentation, along with the slide deck, will be posted on the GSA Professional Services Category Interact Page

● Information shared here is considered market research and is pre-decisional

● Please use the Q&A function if you want to ask a question or need assistance. Phone lines will not be open during event
RFI Industry Day

Today’s Agenda

● Welcome and Opening Remarks
  ○ Adam Soderholm, Program Sponsor

● Background and Vision
  ○ Tiffany T. Hixson, Assistant Commissioner

● Stakeholder Engagement Recap and RFI Findings
  ○ Jill Akridge, Director of Stakeholder Engagement

● Panel Discussion
  ○ Project Team

● Next Steps
  ○ Lee Tittle, Program Manager
Today’s Speakers
From Office of Professional Services and Human Capital Categories

Adam Soderholm
Program Sponsor

Jill Akridge
Stakeholder Engagement

Paul Szymansky
Contracting Officer

Tiffany Hixson
Assistant Commissioner
Executive Sponsor

Lee Tittle
Program Manager

Grace Parker
Acquisition Strategy
Why Establish a New IDIQ?

Government Services Market has Changed

- OASIS ordering period ends in 2024
- Limited access to best-in-class contracts for services beyond the scope of existing enterprise IDIQ contracts like OASIS
- Industry is managing too many contracts, driving up acquisition costs, and this offers MAC consolidation flexibility
- Multiple Award Schedules not able to accommodate the full spectrum of acquisition strategies
Goals for the New Services IDIQ

- **Deliver a simpler buying experience** through a contract program that allows for:
  - commercial and noncommercial services
  - procurement of supporting commodities
  - all contract pricing types
  - use of GSA’s authority to leverage competition at the task order level to establish price

- **Reducing friction in the procurement process** through:
  - vetted open enrollment based on agencies needs
  - thoughtful selection and fair opportunity standards
  - enhanced systems
  - innovative practices

- **Meeting best-in-class (BIC) contract requirements** while
  - improving government oversight and management of spend
  - contract and subcontract performance
  - improving small business participation and access to a BIC contract

- **Position the federal government to reduce contract duplication** by achieving significant burden reduction for both government and industry
  - Eliminate contract duplication while improving access
Designed to Complement MAS

Will provide customer agencies a contract solution when seeking:

- A BIC solution
- Non-commercial services, a mix of commercial and non-commercial services, or commercial services with tailored pricing requirements
- Flexibility for all contract pricing types
- Highly complex integrated solutions
- Industry capabilities closely aligned to agency missions
Lessons Learned

Building from the success of OASIS & GWACs

● Continue to attract highly qualified industry partners

● Create more opportunities to join the contract

● Improve opportunities for business growth

● Expand the scope to cover all services
  ○ professional services
  ○ Service Contract Act
  ○ Walsh-Healey
  ○ Davis Bacon (excluding construction contracts)

● Improve task order competition where it has underperformed
Stakeholder Engagement
Customer Input

Improving Multiple Award Contracts

GSA has shared surveys, held focus groups, and had briefings with leadership at key customer agencies to discuss the acquisition strategy concepts for New Services IDIQ.

Input from 12 agencies, including Contracting Officers, Program Managers, Small Business Offices, Policy, and Leadership.
## Why These Acquisition Strategies

### Customer Feedback Led to Concepts on:

<table>
<thead>
<tr>
<th>Strategy</th>
<th>Concepts</th>
</tr>
</thead>
</table>
| **Vetted Open Enrollment**      | - Incumbents unavailable
                                | - Insufficient small business participation
                                | - Changes in industry / emerging markets                                 |
| **Combine Small and Large**     | - Want to see capabilities from both
                                | - Competition may be insufficient
                                | - Better for small business set aside decisions                           |
| **Expanded Scope**              | - Need BIC for more than just these services
                                | - Customers want this contract type for more
                                | - Original scope was very DOD centric                                     |
| **Capabilities Data**           | - Need visibility into who does what
                                | - Better business decisions
                                | - Shortening acquisition timelines                                         |
| **Enhanced Pricing Data**       | - Pricing data is a must have for COs
                                | - Standard Labor Categories only tell so much                             |
                                | - Prices paid is a BIC requirement                                        |
## Why These Acquisition Strategies

### Industry Feedback Led to Concepts on:

<table>
<thead>
<tr>
<th>Strategy</th>
<th>Concerns</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Vetted Open Enrollment</strong></td>
<td>- I couldn’t get in, and now I’m losing business</td>
</tr>
<tr>
<td></td>
<td>- I didn’t meet the standards then, but I do now</td>
</tr>
<tr>
<td></td>
<td>- The standards are too high for small business</td>
</tr>
<tr>
<td><strong>Combine Small and Large</strong></td>
<td>- If I size out of small, I don’t qualify for large</td>
</tr>
<tr>
<td></td>
<td>- I’d have to onboard to both contracts</td>
</tr>
<tr>
<td></td>
<td>- I have to manage too many contracts</td>
</tr>
<tr>
<td><strong>System Capabilities</strong></td>
<td>- No more email solicitations, please</td>
</tr>
<tr>
<td></td>
<td>- Turbo Tax it</td>
</tr>
<tr>
<td></td>
<td>- I have no visibility into customer behavior</td>
</tr>
<tr>
<td><strong>Criteria Based Model</strong></td>
<td>- Scoring method isn’t good for all small bus.</td>
</tr>
<tr>
<td></td>
<td>- Certifications should be a nice to have</td>
</tr>
<tr>
<td></td>
<td>- This model will help alleviate teaming needs</td>
</tr>
<tr>
<td><strong>Comprehensive Data</strong></td>
<td>- Customers ask for the same thing in RFIs</td>
</tr>
<tr>
<td></td>
<td>- I want to showcase my capabilities</td>
</tr>
<tr>
<td></td>
<td>- I gave this to GSA, why can’t customers see it</td>
</tr>
</tbody>
</table>
Domains and Scope (Initial Concepts)

- Technical and Engineering
- Research and Development
- Management and Advisory
- Financial Services
- Logistics
- Human Capital
- Training
- Facilities
- Base Operations Support
- Public Health
- C4ISR
- Major Acquisitions
- Business Administration
- Legal
- Social
Customer Scope Needs

Potential Specialized Domains

- Intelligence, Surveillance, and Reconnaissance (ISR)
- Base Operations Support
- SCLS
- OCONUS
- System Program Office Support
- R&D for Emerging Tech
- Major Acquisitions
- OCONUS
Domains / Small Bus. / Reserves

**Domains represent common scope**

- Industry onboards to the Domain as a whole including all of the NAICS listed
- Small businesses are eligible for small/socio set asides in any NAICS in a Domain where they qualify as small
- Domains will have large and small businesses together
- Each Domain will have its own qualification standards and Reserves targets
- Reserves targets will be based on industry profile for a given scope area
- Reserves will reflect a minimum - not caps

*All numbers in the provided examples are fictional and presented for illustrative purposes only*
Industry Engagement Statistics

Who We’ve Heard From

<table>
<thead>
<tr>
<th>RFI</th>
<th>Business Size</th>
<th>Contracts Held</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Small 293</td>
<td>Schedules 863</td>
</tr>
<tr>
<td></td>
<td>Large 142</td>
<td>Other Agency IDI 602</td>
</tr>
<tr>
<td></td>
<td>Mixed 613</td>
<td>OASIS 327</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Other GSA IT 147</td>
</tr>
<tr>
<td></td>
<td>Vet Owned 8A</td>
<td>8A Stars II 119</td>
</tr>
<tr>
<td></td>
<td>HubZ</td>
<td>HCaTS 77</td>
</tr>
<tr>
<td></td>
<td>WOSB</td>
<td>Aliant / Alliant 2 54</td>
</tr>
<tr>
<td></td>
<td>SDVOSB</td>
<td>VETS 2 39</td>
</tr>
<tr>
<td></td>
<td>Small Dis</td>
<td>BMO 13</td>
</tr>
</tbody>
</table>

Focus Groups + Briefings

Acquisition Strategy Concepts Feedback and Discussions to verify whether ideas were viable, and where ideas needed to be expanded upon

7 Focus Groups
3 Large Business Sessions
4 Small Business Sessions
30-40 Companies

6 Industry Briefings
Small and Large Businesses Briefings / Feedback
Over 200 companies

*Businesses were only counted as small if they were both below $8m size threshold and had less than 500 employees
**Contract Structure**

### Combining Small and Large
- Favorable: 50%
- Unfavorable: 32%
- Either: 18%

### Implementing Reserves
- Favorable: 72%
- Unfavorable: 11%
- Either: 17%

### Domain Structure
- Favorable: 78%
- Unfavorable: 12%
- Either: 10%

<table>
<thead>
<tr>
<th>Continuous Open</th>
<th>Favorable</th>
<th>Unfavorable</th>
</tr>
</thead>
<tbody>
<tr>
<td>Caps on some domains based on customer agency re..</td>
<td>625</td>
<td>240</td>
</tr>
<tr>
<td>Continuously Open (always open)</td>
<td>636</td>
<td>190</td>
</tr>
<tr>
<td>Continuously Open (Quarterly open windows)</td>
<td>487</td>
<td>342</td>
</tr>
<tr>
<td>No caps on number of vendors in a domain</td>
<td>474</td>
<td>280</td>
</tr>
</tbody>
</table>
The criteria based model was widely seen as favorable, and the preference to allow for subcontractor experience clear, with Primes mostly willing to support verification of that experience.
Teaming Arrangements

The Contract’s Biggest Mystery

Teaming Arrangements must be considered per 15 USC 644(q)(1) - even at the IDIQ level

GSA will still need to determine the best strategy for considering experience as a team

Semi-final concepts will not be shared until after the second Request for Information

Strategies by order of preference based on results

- Restrict business entities from participating in multiple teams in a single domain
- Require teams to have worked together in the past for the experience to be eligible
- Require a workshare proportional to the historical relationship of the team
- Restrict the number of companies that can be on a team
- Limit project experience to once per Domain (Teams can’t share)
Vendor Profiles + Experience Data

Profiles are generally seen as a good feature, but there are concerns about how much management they will require.

GSA is exploring a balance between maintaining a library of project experience and an ability to summarize capabilities.

Effort to Manage Profile

- Some: 49%
- Little to None: 32%
- A Lot: 6%
- Unsure: 13%

Extent that Industry Agrees that:

- Tagging is a Good Improvement
- Would Be Honest About Tags
- Would Use Tags to Determine T.O Interest
- Other Companies Would Be Honest
- Open to Co Flags for Quality Control
- Quality Controls Should Be Implemented
- GSA: Verify Every Project and Tag
- Random Audits and User Driven Flags Adequate QC
Market Research + Fair Opportunity

Not a limiter of fair opportunity

Certifications can be added at any time

Industry partners would get notified of any new additions

Customer searches would be saved to help with forecasting

This is a lead in to view industry profiles

*All numbers in the provided examples are fictional and presented for illustrative purposes only*
Pricing Strategies

- Prices Paid data is required for Best-in-Class contract designation
- Prices Paid to match current Schedules pricing data structure favorable
- More Labor Category guidance / standards wanted from customers
- A balance between burden and usability will need to be determined
Panel Discussion

Moderator
● Adam Soderholm - Program Sponsor

Panelists
● Jill Akridge - Stakeholder Engagement
● Grace Parker - Acquisition Strategy
● Paul Szymansky - Contracting Officer
● Lee Tittle - Program Manager
Next Steps, Schedule and Reminders
What’s Next

Projected Milestones

Release 2nd RFI / Capabilities
  ● Q3 FY21

First Draft Solicitation
  ● Targeting Q1 FY22

Final Solicitation
  ● FY22 (Dependent on feedback received from draft RFP)
How to Stay Connected

- Professional Services Community on Interact
  - Resources / FAQs and Fact Sheet

- Participation in Industry Associations

- Send an email to: pshc-dev@gsa.gov
Questions
Appendix
New Services IDIQ

Framework

Features
- Enhanced Contract Administration
- Systems Oriented
- Best in Class
- Vetted Open Enrollment
- Unpriced Master Contracts
- Small Business Set Asides

Order Types
- Fixed Price
- Non Commercial
- Commercial
- Cost Type
- Time & Materials
- Hybrid

One Solution
New Services IDIQ
Customer Concerns

What We Need to Keep in Mind

**Quality**
Want to maintain highly qualified industry base, with knowledge that GSA is monitoring behavior

- Implement better quality controls
- Ensure solicitation criteria meets customer standards while balancing small business capabilities
- Create Domain spaces that are reflective of customer needs for various services

**Competition**
Afraid of too many bids if there aren’t caps and limiters of fair opportunity

- Enhanced data is seen as helpful in providing insight into who can truly do the work
- Want quality controls around prohibitive bidding behavior to prevent unqualified participation
- Emphasize and train on order level qualifications model for task orders

**Pricing**
Pricing data and guidance is necessary. “If that information isn’t provided, what’s the value?”

- Require enhanced prices paid data
- Find viable alternative sources of data until adequate prices paid data is available in digital tools
- Continue to evolve pricing data strategies as other pricing type possibilities (such as outcomes) becomes viable / measurable
Data - Industry vs Customers

Feedback on value of data types relative to average

We asked industry and customers the same questions about the value of filters and data to determine if there were priority data types.

Industry and customers have opposite opinions, with some areas of agreement.

*Relative value is based on the variance from the average score across data fields*
Pricing Strategy Preferences

Industry Feedback on which methods are best

Results showed support for the collection of pricing data by Labor Category with the ability to utilize data delineators to indicate the unique qualities of that rate.

*The solid line represents the average value across all fields, allowing this chart to depict interest relative to the average. Area chart in the background represents minimum and maximum values based on industry feedback.*
Polaris

For More Information:

The Polaris team encourages small businesses to join their Community of Interest on Interact:

https://interact.gsa.gov/group/small-business-gwac-community-interest