



U.S. General Services Administration

# Federal Acquisition Service

## OASIS Industry Day

**OASIS Program Executive Office  
General Supplies and Services  
Federal Acquisition Service**

**May 13, 2013**



# Agenda

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## Federal Acquisition Service

1:00 – 1:10 Welcome: Jeff Koses

1:10 – 1:20 Introductions: Jim Ghiloni

1:20 – 2:30 OASIS Topics

2:30 – 2:40 BREAK

2:40 – 3:30 OASIS Topics

3:30 – 4:00 Open Question Session



# Ground Rules for Today

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



# General

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



# Relevant Experience

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- Relevant Experience Minimum Standards
  - 5 Projects as a Prime Contractor
  - Projects must be a project that could have been performed on OASIS
  - Projects must include 4 of the 6 Core Disciplines
  - Average Annual Value of \$5,000,000
  - 3 of the 5 projects must be for the Federal Government
  - Must have been completed within the past 5 years or be ongoing with at least one year of performance



# Relevant Experience

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- Projects are individual task orders or contracts
  - IDIQs and BPAs do not qualify, but orders placed under them do
  - We are considering allowing single award IDIQs and/or BPAs to qualify, but have not decided yet
  - We are also considering establishing points for demonstrated experience in handling IDIQ contracts
  - We will establish points for cost reimbursement experience, but haven't established point values yet



# Relevant Experience

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



# Commercial Experience

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



# Pools/NAICS/Core Disciplines

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



# Pools/NAICS/Core Disciplines

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



# Pools/NAICS/Core Disciplines

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### ➤ Why have Pools on OASIS?

- First, we want to ensure that we have adequate competition for all potential OASIS requirements. OASIS has a very broad scope and we expect that the OASIS contractors will be very savvy regarding the opportunities that they pursue based upon their primary core competencies. For example, some contractors may specialize in R&D work and some may specialize in military engineering but not be interested in R&D work. Some companies simply don't do development work because it causes OCI issues for their corporate structure, while other companies focus specifically on development work. Accordingly, we felt Pools for the OASIS contract would help ensure adequate competition levels for all requirements.



# Pools/NAICS/Core Disciplines

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- Why have Pools on OASIS?
  - Second, we felt that the establishment of Pools may theoretically make it easier for graduating small businesses on OASIS SB to be able to on-ramp to OASIS.



# Pools/NAICS/Core Disciplines

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



# Number of Awards

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



# Accounting Systems

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

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

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

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



# Purchasing Systems

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

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

### ➤ **Advantages:**

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

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



# Estimating Systems

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

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



# Earned Value Management Systems

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

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



# Systems

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### General Comments/Questions

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



# Systems

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### ANTICIPATED PASS/FAIL CHANGES

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



# Systems

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### ANTICIPATED POINT CHANGE

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



# Certifications

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

- CMMI Maturity Level 5            200 Points
- CMMI Maturity Level 4            150 Points
- CMMI Maturity Level 3            100 Points
- ISO9001:2008                        150 Points
- AS9100 Certification                50 Points

- \*Total Maximum Points is 400 out of 6,800 or 5.8%
- (Subject to change in final RFP)



# Certifications

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

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

Question: Are certifications that are “in process” sufficient

Answer: NO



# Certifications

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

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

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

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

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

**Answer:** Scoring is not tailored to individual pools



# Certifications

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

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

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

**Answer:** Yes, Please let us know!



# Contract Access Fee (CAF)

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



# Labor Categories

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



# Labor Categories

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### ➤ **Changes:**

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

### ➤ **Clarifications:**

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



# Labor Rates

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## ➤ **Changes:**

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

## ➤ **Clarifications:**

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



# Labor Rates

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## ➤ **Clarifications:**

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



# Marketing Issues

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## ➤ ***Changes:***

- We are deleting the requirement for a marketing brochure

## ➤ ***Clarifications:***

- The website requirement shall remain



# Key Personnel

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## ➤ **Clarifications:**

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



# Key Personnel

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### ➤ **Changes:**

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



# Past Performance/CPARS

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### ➤ **Changes:**

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

### ➤ **Clarifications:**

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



# Ramping

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➤ ***Key advantage of the OASIS contract***

- Will be used to keep competition levels healthy
- Will NOT be used to allow companies to purchase their way onto the contracts



# Dormant Status

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



# Scoring System Fundamentals

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- Why Don't You Offer Points for Minimum Requirements?
  - Because it does nothing to distinguish between Offerors
  
- Quest for the Perfect Score
  - We do not feel that any company will receive a perfect score
  
- Scored Elements do not apply to all Task Orders
  - We know. This is designed to be part of the flexibility of the scoring system.



# Evaluation Strategy

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



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# Open Question Session