

Acquisition Playbooks:

Using the Acquisition Dashboards to Monitor, Implement, and Update Agency
Data for Category Management

March 2024



Questions

If you have any questions regarding the content of these slides or the data available on the Category Management Dashboards, please contact the CM PMO Data Team:

govtwidecmdashboards@gsa.gov

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Overview: What is the Playbook?

The CM Playbook is a guide to help CM stakeholders access and use online data and tools that the CM PMO developed. It will assist CM stakeholders in completing their CM requirements and monitoring their CM performance by providing step-by-step walkthroughs. A subset of the platform is also available for public use.

It's designed for:

- agency and category executives
- policy makers
- program managers
- contract officers
- data analysts
- vendors

Capabilities:

- Export CM data (including spend under management (SUM), Tier details, and Tier-rated contracts)
- Download executive reports to monitor CM KPIs
- Create and download operational reports that support CM execution
- Compare and analyze pricing using transactional data



Acquisition Playbooks
[Gateway Link]



CM Quick Decisions Dashboard



Oversight & Performance Management Tools



Contract Management Tools



Acquisition Analytics

CM Background and Overview

Via [M-19-13](#) and several earlier directives, the Government is implementing **category management (CM)**:

The business practice of buying common goods and services as an enterprise to eliminate redundancies, increase efficiency, and deliver more value and savings from the Government's acquisition programs.

OMB and GSA have partnered to develop a set of dashboards and tools to assist agencies in implementing category management, specifically in the following activities:

1. Monitoring CM goals and improvements
2. Implementing CM
 - Increase Spend Under Management (SUM)
 - Reduce duplicative Tier 0 contracts
 - Increase small-business utilization
3. Updating your agency's CM data in the Contract Inventory

CM Background and Overview (Cont.)

[OMB Memo M-22-03 Advancing Equity in Federal Procurement](#) (Dec. 2021)

Implements the President's commitment to 15% in small disadvantaged businesses (SDBs) spend by FY 2025.

Key Agency Actions:

1. Agree on FY22 interim SDB goals
2. Adjust CM practices to boost opportunities for SDBs
3. Increase the number of new small business entrants into the federal marketplace
4. Include small business contracting goals in Executive performance plans
5. Ensure small business offices have access to senior leadership

[OMB Memo M-23-11](#) (Feb. 2023)

Creating a More Diverse and Resilient Federal Marketplace through Increased Participation of New and Recent Entrants

1. Provides definitions of "new" and "recent" entrants, to track and support increasing the number of new entrants in the federal marketplace
2. Introduces a performance tool and a market research tool, to support agencies in increasing equity in procurement

Keeping the Contract Inventory Updated

The Contract Inventory is the foundation for SUM and Best in Class (BIC); if the inventory is not current, agencies risk losing credit for use of approved Tier-rated contracts. Below are some situations that require a Contract Inventory Form and/or OFPP approval for contracts to stay updated in the Contract Inventory:

	OFPP Approval Required	Contract Inventory Form Required
Approved contract on-boards new vendors	No	Yes
Approved Class C contract (such as Large Scale Construction) not centrally managed and not submitted for credit	No	Yes
Approved contract expires, but follow on contract not submitted for tier rating	Yes	Yes
Brand new vehicle has been created but has not been Tier rated	Yes	Yes

Contract Inventory – Important Notes

- Agencies are 100% responsible for keeping the inventory up to date, most critically for vehicles managed by that agency
- Agencies submit Contract Inventory update forms using the key field of Contract Number, Contract Name, and Tier
- Once the inventory contains a contract, any associated awards, task orders, mods, etc. are automatically given the Tier rating of the base contract
- Any Procurement Instrument Identifier (Reference PIID or PIID) not associated with an entry in the inventory will receive a Tier 0 rating by default

A	B	C	D	E	F
Action (Add/ Update/ Remove)	Contract Number	Contract Name	Tier	Managing Agency	Updated Tier (if update)
Add	DAAA0902D0007	Logistics Civil Augmentation Program (Inc. III)	Tier 1	Army - Army Sustainment Command	
Update	W52P1J07D0007	Logistics Civil Augmentation Program (Inc. IV)		Army - Army Sustainment Command	Tier 1
Update	W52P1J07D0008	Logistics Civil Augmentation Program (Inc. IV)		Army - Army Sustainment Command	Tier 1
Update	W52P1J07D0009	Logistics Civil Augmentation Program (Inc. IV)		Army - Army Sustainment Command	Tier 1
Add	W52P1J12C2000	Enhanced Army Global Logistics Enterprise (EAGLE) (Basic Ordering Agrmnt)	Tier 1	Army - Army Sustainment Command	
Update	W52P1J12G0012	Enhanced Army Global Logistics Enterprise (EAGLE) (Basic Ordering Agrmnt)		Army - Army Sustainment Command	Tier 1
Update	W52P1J12G0017	Enhanced Army Global Logistics Enterprise (EAGLE) (Basic Ordering Agrmnt)		Army - Army Sustainment Command	Tier 1
Update	W52P1J12G0018	Enhanced Army Global Logistics Enterprise (EAGLE) (Basic Ordering Agrmnt)		Army - Army Sustainment Command	Tier 1
Update	W52P1J12G0019	Enhanced Army Global Logistics Enterprise (EAGLE) (Basic Ordering Agrmnt)		Army - Army Sustainment Command	Tier 1

Tools that Support CM Activities

Tool Kit		Tool/Dashboard	High-level Description
Monitoring Category Management Goals and Improvements	Oversight & Performance Management Tools	Agency Profile Report	A multi-visualization tool that provides a single place for agency-acquisition professionals to understand their agency's contracting profile; offers a detailed category-specific lens and a variety of metrics.
	Oversight & Performance Management Tools	Executive Summary Dashboard	Provides monitoring at the Government-wide category and agency levels for Key Performance Indicators (KPIs) and President's Management Agenda goaling.
	Contract Management Tools	CM Reporting Workbench	Provides a summary view of an agency or category contracting activity, including CM data enrichments like SUM and BIC.
Implementing Category Management	Contract Management Tools	CM Reporting Workbench → Award Exploration Tool	An interactive tool designed to support in-depth data exploration and exports; users are able to search for specific award records, query expiring contracts, and export line item data with added CM enrichments such as Level 1/2 categories, SUM Tier, Addressable BIC / Tier 2 Contract, Contract Name (if applicable).
	Acquisition Gateway	Solutions Finder	Enables users to search, filter and compare offerings from across Government. A solution can be anything from a contract vehicle such as a Blanket Purchase Agreement (BPA) or Government-wide Acquisition Contract (GWAC), to other offerings such as, shared services, government-rate tenders, or licensing agreements.
	Oversight & Performance Management Tools	Small Business Dashboard	Replicates key components of the SBA Scorecard through a CM lens.
Updating Your Agency's Category Management Data	Contract Management Tools	CM Reporting Workbench → Contract Inventory Exploration Tool	An easy reference for agency and category teams to search and export contract information, including the enhanced fields used by the data team to determine the master and the derivative contract information required to determine the appropriate SUM Tier level.

NOTE: Access to some of these tools requires a user to be logged into the Acquisition Gateway or D2D using Government credentials

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Monitoring CM Goals and Improvements

This section helps agencies monitor their CM goals and improvements with the following sections:

1. List of CM tools to monitor CM performance and goals
2. Playbook for using the Agency Profile Report
3. Playbook for checking agency progress toward the goals established in the annual agency CM plans



Monitoring CM Goals and Improvements Playbooks and Tools

Link to Playbook	Applicable Tools/Dashboards	High-level Description
 <p>Agency Profile (APR)</p>	<p>Oversight & Performance Management Tools → Agency Profile Report</p>	<ul style="list-style-type: none"> • Visuals of obligation levels, top buying organizations, SUM and BIC usage, top vendors, categories and subcategory spend, contract profile, and expiring awards • Ability to compare SUM usage, BIC usage, and Tier 0 contract reduction annual progress to prior year and annual goals • Filterable by category and department/ agency • Uses FPDS-NG and CM data enrichments
 <p>Progress to Goals</p>	<p>Oversight & Performance Management Tools → Executive Summary Dashboard</p>	<ul style="list-style-type: none"> • Visuals to assess the status / progress toward established CM goals • Filterable by category and department/ agency • Utilizes FPDS-NG and CM data enrichments <hr/> <ul style="list-style-type: none"> • Visuals of contract activity related to CM • Filterable by category and department/ agency • Utilizes FPDS-NG and CM data enrichments

NOTE: Access to some of these tools requires a user to be logged into the Acquisition Gateway or D2D with their Government credentials.

Agency Profile Report Playbook

This playbook helps agencies check their status and compare to established **spend under management (SUM) and Best-in-Class (BIC) contract** KPI goals.

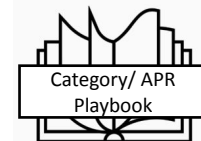
The table below contains the steps, detailed on the following pages, to use the dashboards to profile an agency's contract activity and to assess progress to established CM goals at the Govt.-wide, category and agency levels.

Step	Applicable Dashboard	
Step 1: Profile Agency or Category Obligation Activity	Oversight & Performance Management Tools	Agency Profile Report
Step 2: Compare Agency KPIs and Goals		



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Step 1: Profile Agency/Category Obligation Activity



[Link to Performance Management Tools](#)

“Agency Profile Report”

Steps within Dashboard:

1. Click “Current Spend Profile” Tab
2. Filter your organization under the ‘Department’ menu
3. Assess Agency profile:
 - Obligations
 - SUM vs unmanaged
 - Small Business
 - Categories
 - Departments/Agencies/Bureaus
 - Contracts
 - Vendors/SB Vendors

Optional

4. Select Category to adjust displayed metrics to a specific category



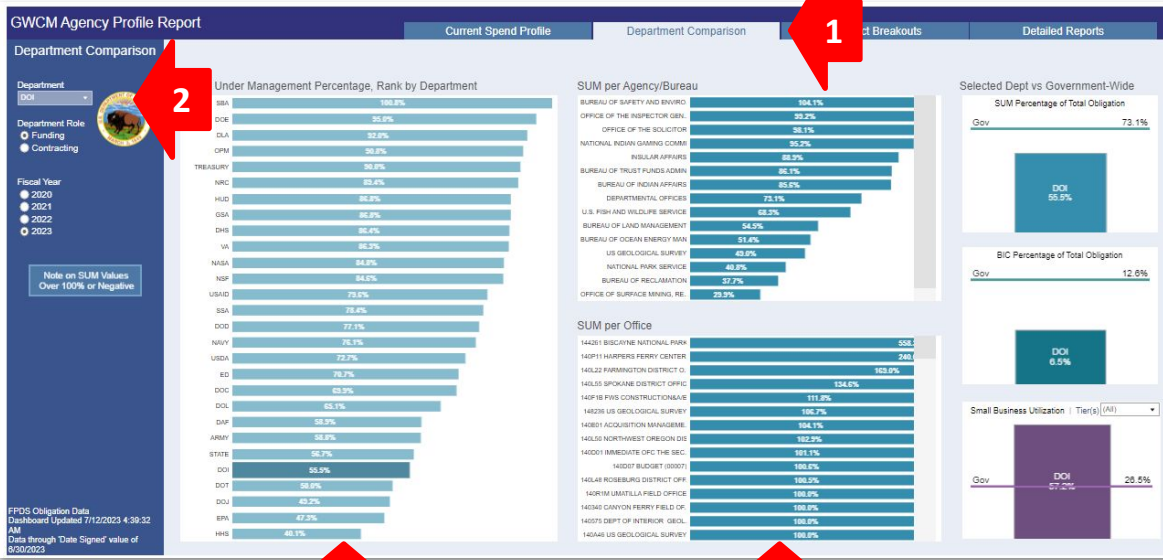
Step 2: Compare Agency KPIs and Goals



[Link to Performance Management Tools](#)
"Agency Profile Report"

Steps within Dashboard:

1. Click "Department Comparison" Tab
2. Select your organization under the 'Department View'
3. Compare SUM, BIC, and Training progress to goals
4. Compare SUM, BIC, and Training progress to Govwide



Step 3: Contract Breakouts

[Link to Performance Management Tools](#)

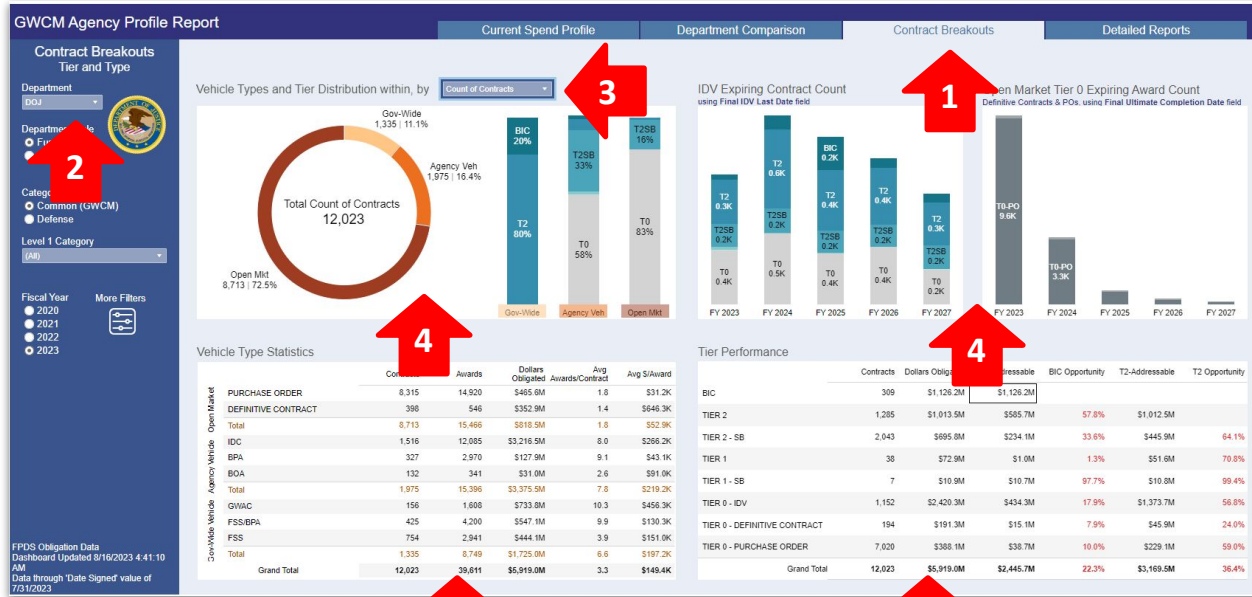
“Agency Profile Report”

Steps within Dashboard:

1. Click “Contract Breakouts” Tab
2. Select your organization under the ‘Department View’
3. Adjust the breakout filter by Dollars Obligated, Count of Contracts, or Count of Awards to change the graph
4. Analyze the vehicle types and tiers, expiring contract counts, statistics, and tier performances

Optional

5. Filter by category and or use more filters for a deeper dive





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Step 4: Detailed Reports

GWCM Agency Profile Report

Current Spend Profile | Department Comparison | Contract Breakouts | Detailed Reports

Detailed Reports

Department: HHS

Department Role: Contracting

Category Group (allied): Common (GWCM)

Level 1 Category: (A8)

Fiscal Year: 2020, 2021, 2022, 2023

Select Report To View: Obligation Detail By Vendor, Contract Types & Obligation, IDVs Expiring within 3 FYs, Awards Expiring within 3 FYs

Instructions for Detail Export

FPDS Obligation Data Dashboard Updated 3/16/2023 4:41:10 AM
Data through 'Date Signed' value of 7/31/2023

Contract Geo.	IDV/Award Ty.	Hierarchy Idv.	Contract Name	Day of Final	Open Mkt Co.	Tier Group	Bic Address.	Coded Fundl.	Funding Agen.	Funding Offic.	Coded Contra.	Level 1 Categ.	Level 2 Categ.	Level 3	Amount
	IDC	75D30123D1.	Null	June 6, 2024	Null	TIER 0	ECAT, Joint...	HHS	CENTERS F.	CDC OFFICE.	HHS	Medical	Drugs and Ph.		\$-2,224.29
		75D30123D1.	Null	June 6, 2024	Null	TIER 0	ECAT, Joint...	HHS	CENTERS F.	CDC OFFICE.	HHS	Medical	Drugs and Ph.		\$8,161.00
		75D30123D1.	Null	June 30, 2024	Null	TIER 0	Null	HHS	CENTERS F.	CDC OFFICE.	HHS	Medical	Drugs and Ph.		\$17,182.00
		75D30123D1.	Null	June 30, 2024	Null	TIER 0	Null	HHS	CENTERS F.	CDC OFFICE.	HHS	Medical	Drugs and Ph.		\$294,398.00
		75F40123D0.	HHS Socioec.	July 9, 2028	Null	TIER 2 - SB	Null	HHS	FOOD AND.	FDA OFFICE.	HHS	Professional	Management...	Acquisition Support	\$0.00
		75H70623D0.	HHS Socioec.	January 31, 2.	Null	TIER 2 - SB	Null	HHS	INDIAN HEA.	GREAT PLAI.	HHS	Facilities & C.	Facility Relat.	Housekeeping	\$36,938.94
		75H70623D0.	HHS Socioec.	January 31, 2.	Null	TIER 2 - SB	Null	HHS	INDIAN HEA.	GREAT PLAI.	HHS	Medical	Healthcare S.		\$239,106.75
		75H70623D0.	HHS Socioec.	May 31, 2024	Null	TIER 2 - SB	Null	HHS	INDIAN HEA.	GREAT PLAI.	HHS	Medical	Healthcare S.		\$781,552.00
		75N90023D0.	Null	December 31.	Null	TIER 0	Null	HHS	NATIONAL I.	NATIONAL I.	HHS	Professional	Management...	Other Managem...	\$0.00
		75N90023D0.	HHS Socioec.	August 12, 20.	Null	TIER 2 - SB	GSA Global S.	HHS	NATIONAL I.	NATIONAL I.	HHS	Professional	Management...	Other Managem...	\$0.00
		75N90023D0.	HHS Socioec.	October 31, 2.	Null	TIER 2 - SB	Null	HHS	NATIONAL I.	NIH A E CO.	HHS	Facilities & C.	Facility Relat.	Maintenance, Re...	\$1,796,656.92
		75N90023D0.	HHS Socioec.	March 27, 20.	Null	TIER 2 - SB	Null	HHS	NATIONAL I.	NIH A E CO.	HHS	Facilities & C.	Facility Relat.	Maintenance, Re...	\$3,762,455.38
		75N90023D0.	HHS Socioec.	July 17, 2027	Null	TIER 2 - SB	Null	HHS	NATIONAL I.	NIH A E CO.	HHS	Facilities & C.	Facility Relat.	Maintenance, Re...	\$1,121,955.34
		75S2032D0.	HHS Socioec.	March 27, 20.	Null	TIER 2 - SB	Null	HHS	NATIONAL I.	NIH A E CO.	HHS	Facilities & C.	Facility Relat.	Maintenance, Re...	\$0.00
		140D042D0.	Null	March 6, 2028	Null	TIER 0	Building Main.	HHS	ADMINISTRA.	ADMIN FOR...	DOI	Professional	Management...	Other Managem...	\$2,500.00
	Gov-Wide Vehicle	47QTC18D.	SCHEDULE...	November 5.	Null	TIER 2	Sched 70 HW...	HHS	INDIAN HEA.	OK CITY AR...	HHS	IT	IT Profession...	Application	\$14,891.58
		47QTC22D.	MAS	August 28,	Null	TIER 2	Sched 70 HW...	HHS	INDIAN HEA.	BEMIDJI AR...	HHS	IT	Products	Application	\$49,996.00
		47QTC22D.	Null	August 28,	Null	TIER 2	Sched 70 HW...	HHS	INDIAN HEA.	PHOENIX AR...	HHS	IT	Capability As...	Network	\$183,218.00
		47QTC22D.	Null	August 28,	Null	TIER 2	Sched 70 HW...	HHS	CENTERS F.	OF ACQ.	HHS	Professional	Management...	Other Managem...	\$1,867,679.06
		GS03F040GA	SCHEDULE...	February 13,	Null	TIER 2	Null	HHS	NATIONAL I.	NATIONAL I.	HHS	IT	Products	Compute	\$-1,948.00
		GS07F0684T	SCHEDULE...	October 31,	Null	TIER 2	Null	HHS	NATIONAL I.	NATIONAL I.	HHS	Office Manag...	Office Manag...	Office Manag...	\$57,896.30
		GS07F0684T	SCHEDULE...	October 31,	Null	TIER 2	Null	HHS	NATIONAL I.	NATIONAL I.	HHS	Office Manag...	Office Manag...	Office Manag...	\$10,911.50
		GS07F0684T	SCHEDULE...	October 31,	Null	TIER 2	Null	HHS	NATIONAL I.	NATIONAL I.	HHS	Office Manag...	Office Manag...	Office Manag...	\$-661.65
		GS07F0684T	SCHEDULE...	October 31,	Null	TIER 2	Null	HHS	CENTERS F.	CDC OFFICE.	HHS	Industrial Pro.	Test & Measu...	Laboratory Equip...	\$0.00
		GS33F390GA	Sched 70 HW...	March 21, 20.	Null	BIC	GSA Global S.	HHS	INDIAN HEA.	NAVAJO AR...	HHS	Facilities & C.	Facility Relat.	Refrigeration, Air...	\$32,069.38
		GS33F390GA	Sched 70 HW...	March 21, 20.	Null	BIC	GSA Global S.	HHS	INDIAN HEA.	NAVAJO AR...	HHS	Facilities & C.	Facility Relat.	Refrigeration, Air...	\$77,996.59
		GS33F390GA	Sched 70 HW...	March 21, 20.	Null	BIC	GSA Global S.	HHS	INDIAN HEA.	NAVAJO AR...	HHS	Facilities & C.	Facility Relat.	Refrigeration, Air...	\$77,996.59
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		GS33F390GA	Sched 70 HW...	March 21, 20.	Null	BIC	GSA Global S.	HHS	INDIAN HEA.	NAVAJO AR...	HHS	Facilities & C.	Facility Relat.	Refrigeration, Air...	\$77,996.59
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		GS33F390GA	Sched 70 HW...	March 21, 20.	Null	BIC	GSA Global S.	HHS	INDIAN HEA.	NAVAJO AR...	HHS	Facilities & C.	Facility Relat.	Refrigeration, Air...	\$77,996.59
		GS33F390GA	Sched 70 HW...	March 21, 20.	Null	BIC	GSA Global S.	HHS	INDIAN HEA.	NAVAJO AR...	HHS	Facilities & C.	Facility Relat.	Refrigeration, Air...	\$77,996.59
		GS33F390GA	Sched 70 HW...	March 21, 20.	Null	BIC	GSA Global S.	HHS	INDIAN HEA.	NAVAJO AR...	HHS	Facilities & C.	Facility Relat.	Refrigeration, Air...	\$77,996.59
		GS33F390GA	Sched 70 HW...	March 21, 20.	Null	BIC	GSA Global S.	HHS	INDIAN HEA.	NAVAJO AR...	HHS	Facilities & C.	Facility Relat.	Refrigeration, Air...	\$77,996.59
		GS33F390GA	Sched 70 HW...	March 21, 20.	Null	BIC	GSA Global S.	HHS	INDIAN HEA.	NAVAJO AR...	HHS	Facilities & C.	Facility Relat.	Refrigeration, Air...	\$77,996.59
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		GS33F390GA	Sched 70 HW...	March 21, 20.	Null	BIC	GSA Global S.	HHS							

Playbook Details – Progress to Goals

This playbook helps agencies compare their current performance to KPI goals, SUM, and BIC.

The table below contains the steps, detailed on the following pages, to assess the progress to established goals at the Govt.-wide, category and agency level.

Step	Applicable Dashboard			
Step 1: Assess <u>Govt.-wide</u> progress to goals	Performance Management Tools Executive Summary Dashboard (ESD)			
Step 2: Assess <u>category</u> progress to goals				
Step 3: Assess <u>agency</u> progress to goals				
Step 4: Extract SUM,BIC, & SB Data				

NOTE: Access to many of these tools requires a user to be logged into the Acquisition Gateway or D2D with their Government credentials.

Step 2: Assess Category Progress to Goals

[Link to Performance Management Tools](#)

“Executive Summary Dashboard”

Steps within Dashboard:

1. Click “Category” Tab
2. Click on the desired category under ‘Category View’
3. Assess category performance-to-goal on displayed metrics:
 - Cost avoidance
 - SUM
 - BIC
 - Small business



Step 3: Assess Agency Progress to Goals



[Link to Performance Management Tools](#)

“Executive Summary Dashboard”

Steps within Dashboard:

1. Click “Department View” tab
2. Filter to your Department
3. Assess agency performance-to-goal on displayed metrics:
 - SUM usage
 - BIC usage
 - Training to target
 - CM Maturity Model Scoring
 - Contract Inventory Updates

Step 4: Extract SUM, BIC, & SB Data



[Link to Performance Management Tools](#)

“Executive Summary Dashboard”

Steps within Dashboard:

1. Click “KPI Historical Status” Tab
2. Select a KPI Metric to analyze (SUM, BIC, or SB %)
3. Filter to your Department and to desired Level 1 Category or Categories
4. Analyze the month over month KPI progress for the past 5 FYs, FYs denoted by color
5. Analyze the reported KPI for each FY
6. Click the download button (box with downward facing arrow) > Select “Crosstab” in the menu

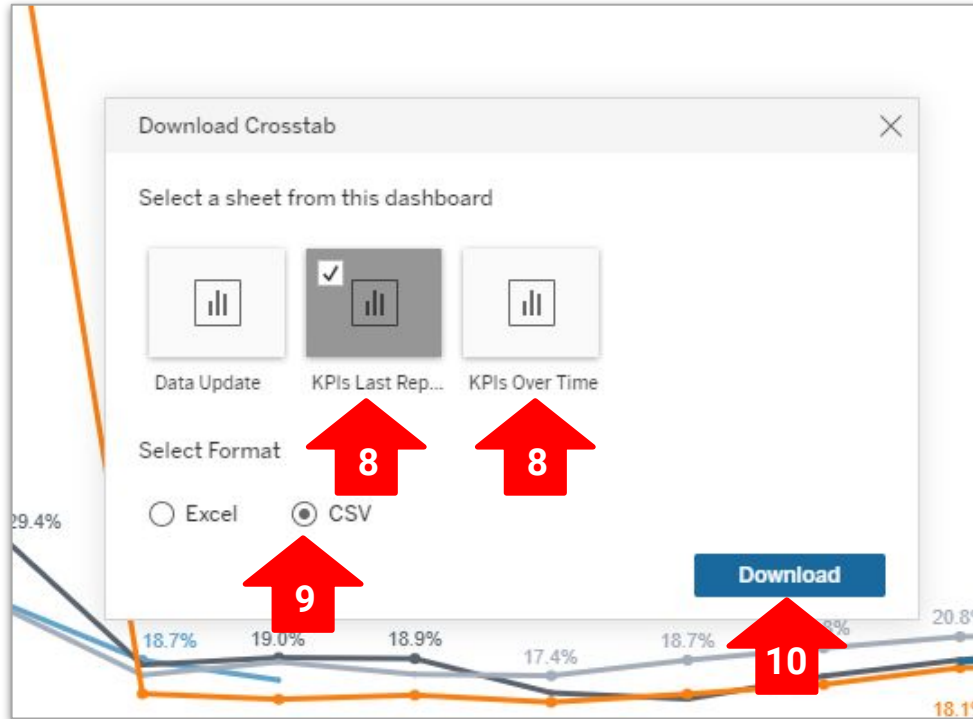
Step 4 (cont.): Extract SUM, BIC, & SB Data

[Link to Performance Management Tools](#)

“Executive Summary Dashboard”

Steps within Dashboard:

8. Select “KPI Last Reported Value” or “KPI Over Time” from the “Download Crosstab” window
9. Select “CSV” under “Format”
10. Click Download



The screenshot shows a 'Download Crosstab' dialog box overlaid on a line chart. The dialog box has a title bar with a close button. Below the title bar, it says 'Select a sheet from this dashboard'. There are three sheet options, each with a bar chart icon: 'Data Update', 'KPIs Last Rep...' (which is selected with a checkmark), and 'KPIs Over Time'. Below these is the 'Select Format' section with two radio buttons: 'Excel' and 'CSV' (which is selected). A blue 'Download' button is at the bottom right of the dialog. Red arrows with numbers 8, 9, and 10 point to the 'KPIs Last Rep...' sheet, the 'CSV' radio button, and the 'Download' button respectively. The background chart shows several data series with percentage values like 29.4%, 18.7%, 19.0%, 18.9%, 17.4%, 18.7%, 20.8%, and 18.1%.

Table of Contents

I. Overview

II. Monitoring Category Management Goals and Improvements

III. Implementing Category Management

IV. Updating Your Agency's Category Management Data

V. Propose eligible Contracts for SUM Tier Ratings

VI. Annual Category Management Planning for Agencies

VII. Appendix of Category Management Resources

Questions & Wrap Up

If you have any questions regarding the content of these slides or the data available on the Category Management Dashboards, please contact the CM PMO Data Team: govtwidecmdashboards@gsa.gov