

# Acquisition Playbooks:

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

March 2024



# Questions

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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](mailto:govtwidecmdashboards@gsa.gov)

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# Implement CM – Section Overview




This section helps agencies implement CM by providing agencies:

1. A description of tools available to identify opportunities and implement CM
2. A guide on how to use CM tools to increase SUM by identifying opportunities to shift spend to Tier-rated contracts
3. A guide on how to use CM tools to identify contract reduction opportunities
4. A guide on how to use CM tools to identify small business improvement opportunities

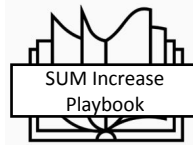


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# Playbooks and Tools for Implementing CM

Link to Playbook	Applicable Tools/Dashboards	High-level Description
	<p><a href="#">Government-Wide Category Management Contract Management Tools</a> → CMR → Awards Explorer</p> <p>Acquisition Gateway → <a href="#">Solutions Finder</a></p> <p>CM Government-only Landing Page - <a href="#">Quick Decisions Dashboard</a></p>	<ul style="list-style-type: none"> <li>• The Awards Explorer allows in-depth data exploration and exports</li> <li>• Users are able to search for specific award records, query expiring contracts, and export line item data</li> <li>• Based on FPDS with CM enrichments such as Level 1/2 categories, SUM Tier, Addressable BIC / Tier 2 Contract, Contract Name</li> </ul>
	<p><a href="#">Contract Management Tools</a> → CMR → Top-N Tier Slicer and Awards Explorer</p>	<ul style="list-style-type: none"> <li>• Provides a variety of flexible and exportable reports               <ul style="list-style-type: none"> <li>• BIC and Tier 2 "Leakage"</li> <li>• SUM contract addressability searches</li> <li>• Dynamic Top N analysis on vendors, contracts, and other parameters</li> </ul> </li> <li>• Based on FPDS with CM enrichments</li> </ul>
	<p><a href="#">Performance Management Tools</a> → Small Business Dashboard &amp; Executive Summary Dashboard</p>	<ul style="list-style-type: none"> <li>• Replicates key components of the SBA Scorecard through the lens of category management</li> <li>• Based on FPDS with CM enrichments</li> </ul>

# Playbook Details – Increasing SUM



This playbook can help agencies increase spend under management (SUM) as part of the procurement planning process. The table below contains the steps necessary to:

- Perform market research on Tier-rated solutions with potential to address agency requirements as part of a balanced agency procurement strategy
- Identify open market Tier 0 awards and expiring contracts with requirements that could be met through govt.-wide solutions

Part	Applicable Dashboard	
Part 1: Perform market research to identify options for tier rated solutions during the procurement planning process	<a href="#">Acquisition Gateway</a>	Solutions Finder
Part 2: Identify Tier 0 awards/ expiring contracts addressable to gov-wide solutions	<a href="#">Contract Management Tools</a>	Award Explorer

# Increasing SUM - Tier Definitions

## **Tier 3 - Best-in-Class (BIC) Solutions**

- Dollars obligated on government-wide contracts that satisfy the most rigorous standards set for leadership, strategy, data, tools, and metrics.

## **Tier 2 - Multi-Agency Solutions**

- Dollars obligated on multi-agency contracts that satisfy rigorous standards set for leadership, strategy, data, tools, and metrics.
- Tier 2 SB are Tier 2 contracts that are awarded to small businesses.

## **Tier 1 - Mandatory-Use Agency-Wide Solutions**

- Dollars obligated on agency-wide contracts with mandatory use or mandatory-consideration policies, along with standards set for data sharing and other criteria.
- Tier 1 SB are Tier 1 contracts that are awarded to small businesses.

## **Tier 0 - Spend not Aligned to Category Management Principles**

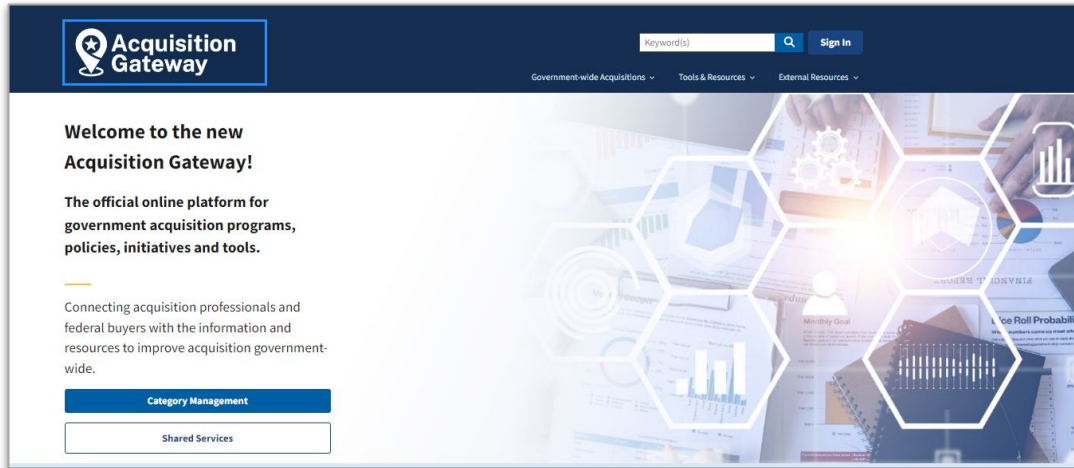
- Dollars obligated on contracts that do not fit into one of the three higher tiers.
- Agencies should analyze Tier 0 spend to find opportunities for shifting those types of contracts to higher-tier solutions.

To summarize: Spend Under Management (SUM) is Tier 1, Tier 1 SB, Tier 2, Tier 2 SB, and BIC spend. **Tier 0 spend is not SUM.** The goal is to move spend from Tier 0 to a higher Tier wherever possible.



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# Part 1: Market Research / Procurement Planning Phase

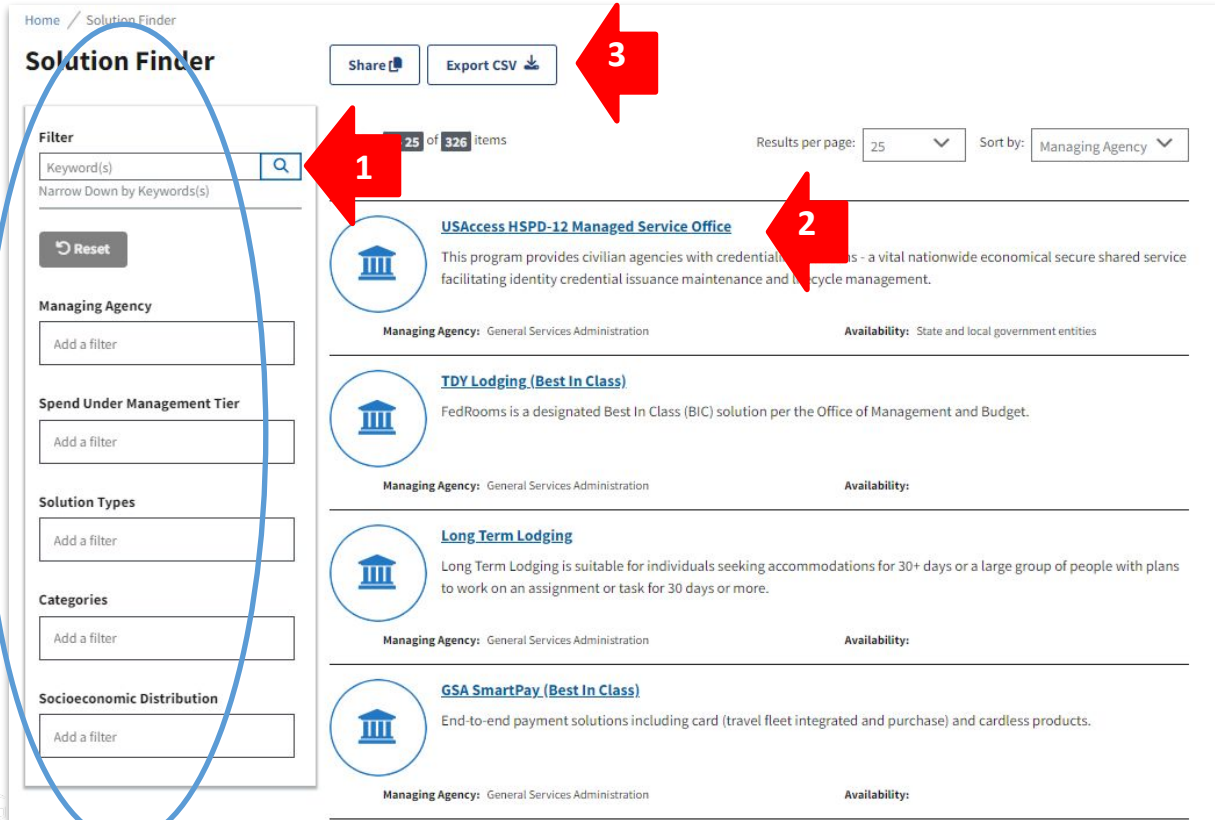


There are a variety of tools available to policy makers and 1102s to search and identify Tier-rated solutions with potential to meet agency requirements, including:

- Acquisition Gateway Solutions Finder
- Awards Explorer

Part 1 provides guidance for how each tool supports market research and procurement planning to increase SUM.

# Acquisition Gateway Solutions Finder Tool



The screenshot shows the 'Solution Finder' tool interface. On the left, a sidebar contains filter categories: 'Filter' (with a search box and 'Reset' button), 'Managing Agency', 'Spend Under Management Tier', 'Solution Types', 'Categories', and 'Socioeconomic Distribution'. Each filter has an 'Add a filter' input field. A blue oval highlights the entire filter sidebar. At the top right of the main content area, there are 'Share' and 'Export CSV' buttons, with a red arrow labeled '3' pointing to them. Below these buttons, the text '25 of 326 items' is displayed. A search box contains 'Keyword(s)' and a magnifying glass icon, with a red arrow labeled '1' pointing to it. Below the search box, the text 'Narrow Down by Keywords(s)' is visible. The main content area displays a list of solutions. The first solution is 'USAccess HSPD-12 Managed Service Office', with a red arrow labeled '2' pointing to its title. Below the title is a description: 'This program provides civilian agencies with credential... - a vital nationwide economical secure shared service facilitating identity credential issuance maintenance and lifecycle management.' Below the description are fields for 'Managing Agency: General Services Administration' and 'Availability: State and local government entities'. The second solution is 'TDY Lodging (Best In Class)', with a description: 'FedRooms is a designated Best In Class (BIC) solution per the Office of Management and Budget.' Below it are fields for 'Managing Agency: General Services Administration' and 'Availability:'. The third solution is 'Long Term Lodging', with a description: 'Long Term Lodging is suitable for individuals seeking accommodations for 30+ days or a large group of people with plans to work on an assignment or task for 30 days or more.' Below it are fields for 'Managing Agency: General Services Administration' and 'Availability:'. The fourth solution is 'GSA SmartPay (Best In Class)', with a description: 'End-to-end payment solutions including card (travel fleet integrated and purchase) and cardless products.' Below it are fields for 'Managing Agency: General Services Administration' and 'Availability:'. At the bottom left of the page, the text 'CATEGORIES MANAGEMENT' is visible.

## [Link to Solutions Finder](#)

Solutions Finder tool: Use to perform additional research on available solutions with a Tier designation.

## Steps within Solutions Finder

1. Refine results by keyword, Managing Agency, PSC and NAICS, and other filters
2. Select a contract to view further information such as links, attachments, and details
3. Select Export to CSV to extract information on contracts or Share to copy the URL with filters applied



# Part 2: Use the Awards Explorer to identify addressable and expiring awards

The Awards Explorer is used to dynamically filter the enriched CM data and export it, so you can perform your own in-depth analysis.

## Part 2 provides guidance to:

- Export data on Tier 0 open market awards (“one-off” buys) that are addressable to a gov-wide solution
- Export data on expiring contracts that are addressable to a gov-wide solution

**Addressability** is used to indicate that the requirement could potentially be met on a particular solution because it has been used to meet similar requirement(s) previously. While not a guaranteed match, it is a starting point for market research using historical data from FPDS. Converting open-market buys, such as purchase orders and definitive contracts, is a simple approach to increasing spend under management.

**Category Management Reporting (CMR) Workbench**

**Awards Explorer**

Additional Filters: Fiscal Year (2021, 2022, 2023, 2024), Contract Used for Award, Tier, PSC Type, Expiration, MAND, NACS, More Filters, Page Controls, Results View (PID Level, Full Detail), Export Data

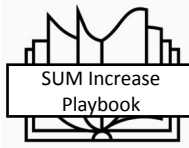
ItemID	Funding	Funding Agency	Funding Office	Contracting Agency	Contracting Office	Category	Level 2 Category	Level 3 Category	Award Type	Contract Name	PSC	MAND	Contract Size Desc
9544470001	GOVERNMENT	DEPARTMENT OF DEFENSE	DEFENSE ACQUISITION	DEFENSE ACQUISITION	DEFENSE ACQUISITION	Professional Services	Professional Services	Other	TERMS A-FFA-CALL	SCHEDULE TIME - HUMAN RESOURCES SERVICES	1000	1000	OTHER THAN SMALL BUSINESS
9544470002	GOVERNMENT	DEPARTMENT OF DEFENSE	DEFENSE ACQUISITION	DEFENSE ACQUISITION	DEFENSE ACQUISITION	Professional Services	Professional Services	Other	TERMS A-FFA-CALL	SCHEDULE TIME - HUMAN RESOURCES SERVICES	1000	1000	OTHER THAN SMALL BUSINESS
9544470003	GOVERNMENT	DEPARTMENT OF DEFENSE	DEFENSE ACQUISITION	DEFENSE ACQUISITION	DEFENSE ACQUISITION	Professional Services	Professional Services	Other	TERMS A-FFA-CALL	SCHEDULE TIME - HUMAN RESOURCES SERVICES	1000	1000	OTHER THAN SMALL BUSINESS
9544470004	GOVERNMENT	DEPARTMENT OF DEFENSE	DEFENSE ACQUISITION	DEFENSE ACQUISITION	DEFENSE ACQUISITION	Professional Services	Professional Services	Other	TERMS A-FFA-CALL	SCHEDULE TIME - HUMAN RESOURCES SERVICES	1000	1000	OTHER THAN SMALL BUSINESS
9544470005	GOVERNMENT	DEPARTMENT OF DEFENSE	DEFENSE ACQUISITION	DEFENSE ACQUISITION	DEFENSE ACQUISITION	Professional Services	Professional Services	Other	TERMS A-FFA-CALL	SCHEDULE TIME - HUMAN RESOURCES SERVICES	1000	1000	OTHER THAN SMALL BUSINESS

Agencies should incorporate **expiring contracts** into their procurement planning; as a contract approaches expiration, explore addressable gov.-wide solutions as options for next-generation requirements



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# Part 2a: Accessing the Awards Explorer



## CM Reporting Workbench (CMR)

Category Management Reporting (CMR) Workbench

FPDS Data through 'Date Signed' 2/15/2024 Last Updated 02/18/2024  
CUI designation: Unclassified | Visibility: External (All CAC/PIV cardholders)

Home - Summary

Base Filters (1)

Quick Search

Include Funding Depts (CFO/Non)

Funding Department

Funding Agency (Bureau)

Funding Office

Contracting Department

Contracting Agency (Bureau)

Contracting Office

Category Group

Level 1 Category

Level 2 Category

Level 3 Category

Current Fiscal Year

Total Obligated **\$85.1B**

Spend Under Management **76.5%**

Small Business Utilization **22.7%**

Actions **926,339**

Awards **852,616**

Contracts **171,203**

Vendors **43,924**

Quick Analytics

Break Out By

Measure to Display

Navigate To

Workbench Tools

Reports

Awards Explorer

Contract Inventory

Top-N Tier Slicer

SUM Contracts YoY

SmallBiz-OSB Delta

Vendor Management

1

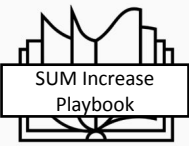
## [Link to the CM Reporting Workbench](#)

### Steps within CMR:

1. Select "Awards Explorer"

\*Note: You can filter to your Funding Department here on the home page or you can wait until you are in the Awards Exploration Tool

# Part 2b: Identify Open Market / Tier 0 Awards Addressable to Govt.-wide Solutions



Category Management Reporting (CMR) Workbench

Home Awards Explorer Contract Inventory Top-N Tier Slicer SUM Contrs. YoY Small Biz/OSB A Vendor Mgmt

**Awards Explorer**

Quick Search

Additional Filters for this View

Fiscal Year: 2021, 2022, 2023, 2024

Contract Used for Award: [Dropdown]

Tier: [All] **3**

More Filters **4**

Results View: Reference PID Level, PID Level, Full Detail

Export Info

Include Funding Depts (CF/Non) [All]

Funding Department [All]

Funding Agency (Bureau) [All]

Funding Office [All]

Contracting Department [All]

Contracting Agency (Bureau) [All]

Contracting Office [All]

Category Group [Government]

Level 1 Category [All]

Level 2 Category [All]

Level 3 Category [All] **4**

Date	Summary	Obligated	Actions	Awards	PIIDs	RefPIIDs	Contracts	Vendors	SUM %	SB %
		\$100.4B	1,086,168	994,204	989,896	41,924	195,672	47,107	77.2%	22.8%

RefPID	Funding D.	Funding Agency/B.	Funding Office	Contracting	Contracting Agency	Contracting Office	Category	Level 2 Category	Level 3 Category	Busin.	Award Type	Contract Name	PSC	NAICS	Co Bus Size	Date
05GASA17A0013	GOVERNME NT ACCOUNT TABLETY OF	05GAG US GAO HC GENERAL	05GAG US GAO HC GENERAL	GOVERNME T ACCOUNTA BILITY OF	05GAG US GAO EXCEPT CO. GENERAL	05GASIA US GAO ACQU. GENERAL	Human Capital	Talent Development	Talent Development	TIER 2	A-BPA CALL	PROFESSIONAL SERVIC. SERVICES SCHEDULE PSS	U009	541330	OTHER THAN SMALL	
05GASA17A0020	GOVERNME NT ACCOUNT TABLETY OF	05GAG US GAO EXCEPT CO. GENERAL	05GAG US GAO EXCEPT CO. GENERAL	GOVERNME T ACCOUNTA BILITY OF	05GAG US GAO EXCEPT CO. GENERAL	05GASIA US GAO ACQU. GENERAL	Human Capital	Talent Development	Talent Development	TIER 2	A-BPA CALL	PROFESSIONAL SERVIC. SERVICES SCHEDULE PSS	U009	541330	OTHER THAN SMALL	
05GASA17A0024	GOVERNME NT ACCOUNT TABLETY OF	05GAG US GAO EXCEPT CO. GENERAL	05GAG US GAO EXCEPT CO. GENERAL	GOVERNME T ACCOUNTA BILITY OF	05GAG US GAO EXCEPT CO. GENERAL	05GASIA US GAO ACQU. GENERAL	Professional Services	Legal Services	Court Services	TIER 2	A-BPA CALL	SCHEDULE 736 - TEMPO.	R606	561320	SMALL BUSINESS	
05GASA17A0027	GOVERNME NT ACCOUNT TABLETY OF	05GAG US GAO EXCEPT CO. GENERAL	05GAG US GAO EXCEPT CO. GENERAL	GOVERNME T ACCOUNTA BILITY OF	05GAG US GAO EXCEPT CO. GENERAL	05GASIA US GAO ACQU. GENERAL	Professional Services	Legal Services	Court Services	TIER 2	A-BPA CALL	SCHEDULE 736 - TEMPO.	R606	561320	SMALL BUSINESS	
05GASA17A0030	GOVERNME NT ACCOUNT TABLETY OF	05GAG US GAO EXCEPT CO. GENERAL	05GAG US GAO EXCEPT CO. GENERAL	GOVERNME T ACCOUNTA BILITY OF	05GAG US GAO EXCEPT CO. GENERAL	05GASIA US GAO ACQU. GENERAL	IT	Capability As a Service	Network	TIER 2	A-BPA CALL	SCHEDULE 70 - INFORM.	D304	541519	OTHER THAN SMALL	
05GASA17A0034	GOVERNME NT ACCOUNT TABLETY OF	05GAG US GAO EXCEPT CO. GENERAL	05GAG US GAO EXCEPT CO. GENERAL	GOVERNME T ACCOUNTA BILITY OF	05GAG US GAO EXCEPT CO. GENERAL	05GASIA US GAO ACQU. GENERAL	Professional Services	Research & Development	Studies & Analy.	TIER 0	C-DELIVERY ORDER	(None Indicate)	8099	542110	SMALL BUSINESS	
05GASA18A0001	GOVERNME NT ACCOUNT TABLETY OF	05GAG US GAO EXCEPT CO. GENERAL	05GAG US GAO EXCEPT CO. GENERAL	GOVERNME T ACCOUNTA BILITY OF	05GAG US GAO EXCEPT CO. GENERAL	05GASIA US GAO ACQU. GENERAL	Professional Services	Management & Advisory	Program Manage.	TIER 0	C-DELIVERY ORDER	(None Indicate)	8408	541690	OTHER THAN SMALL	
05GASA18A0005	GOVERNME NT ACCOUNT TABLETY OF	05GAG US GAO EXCEPT CO. GENERAL	05GAG US GAO EXCEPT CO. GENERAL	GOVERNME T ACCOUNTA BILITY OF	05GAG US GAO EXCEPT CO. GENERAL	05GASIA US GAO ACQU. GENERAL	Professional Services	Management & Advisory	Program Manage.	TIER 2	A-BPA CALL	SCHEDULE 736 - HUMA. EMPLOYMENT OPPORT.	R499	541611	SMALL BUSINESS	

## [Link to the Awards Explorer](#)

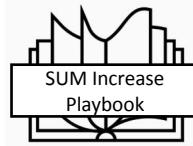
### Steps within Awards Tool:

1. Select your Funding Department
  - o unselect "All"
2. Select the FY of obligation
3. Select "Tier 0"
4. Set other filters as desired
  - o Category
  - o Business Size (Small Biz)
  - o PSC/NAICS





# Part 2c: Identify Expiring Contracts Addressable to Govt.-wide Solutions



[Link to the Awards Explorer](#)

## Steps within Awards Explorer to pull expiring awards

1. Select your Funding Department
2. Select all Fiscal Years
3. Select all Tiers
4. Select the Award/IDV Expiration time frame
5. Set other filters as desired
  - o Category
  - o Agency/Office
  - o Business Size and Type
6. Follow directions in slides Part 2b for exporting/downloading spreadsheet

Category Management Reporting (CMR) Workbench

Awards Explorer

Quick Search

Additional Filters for this View

Fiscal Year: 2021, 2022, 2023, 2024

Contract Used for Award: (All)

Tier: (All)

Expiration: (All), Exp 2-3 FYs out (2026,2027), Expiring current FY (2024), Expiring next FY (2025), Other (Distant/Indefinite/Null exp.)

More Filters

Results View: Reference PID Level, PID Level, Full Detail

Export Info

Summary

Obligated: \$2.5B

Actions: 3,106

Awards: 2,518

Contracts: 2,135

Vendors: 1,723

SUM %: 80.4%

SB %: 13.4%

RepID	Funding D.	Funding Agency B.	Funding Office	Contracting	Contracting Agency	Contracting Office	Category	Level 2 Category	Level 3 Categ.	Busin.	Award Type	Contract Name	PSC	NAICS	Co Bus Size Desc
38F99220259	DAF	5700 DEPT OF THE AIR	FT14S FT14AS 96	DAF	5700 DEPT OF THE AIR	FA263 FA262 AFIC	Medical	Healthcare Services	TIER 2	C-DELIVERY ORDER	INVITRO DIAGNOSTICS	G201	325413	SMALL BUSINESS	
479A2200007	DAF	5700 DEPT OF THE AIR	F1232 F1232 GSA	DAF	5700 DEPT OF THE AIR	FA303 FA302 IT CO	Facilities & Construct.	Facility Related Services	Utilities	TIER 2	C-DELIVERY ORDER	PHS-GSA-Non-wide USR	5111	22118	OTHER THAN SMALL BUSINESS
479FA220083	DAF	5700 DEPT OF THE AIR FORCE	F1ATCY F1ATCY JFCO NW	GSA	4792 FEDERAL ACQUISITION SERVICE	FE25M	Professional Services	Management & Advisory Services	Other Management & Advisory Services	TIER 2	C-DELIVERY ORDER	NO DWAC NAME	8499	541330	OTHER THAN SMALL BUSINESS
479FA220086	DAF	5700 DEPT OF THE AIR	FAAT11 FAAT11 1 AF	GSA	4792 FEDERAL ACQUISITION SERVICE	FE25M	Professional Services	Management & Advisory	Other Management	TIER 2	C-DELIVERY ORDER	[None Indicated]	8499	541990	OTHER THAN SMALL BUSINESS
479FLA180006	DAF	5700 DEPT OF THE AIR FORCE	F500K F500K AF	GSA	4792 FEDERAL ACQUISITION SERVICE	FE25M	Professional Services	Technical & Engineering	General Engineering	TIER 2	C-DELIVERY ORDER	[None Indicated]	8425	541330	OTHER THAN SMALL BUSINESS
479FLA220006	DAF	5700 DEPT OF THE AIR FORCE	F470M F470M GSA	GSA	4792 FEDERAL ACQUISITION SERVICE	FE25M	Professional Services	Technical & Engineering	General Engineering	TIER 2	C-DELIVERY ORDER	[None Indicated]	8425	541330	OTHER THAN SMALL BUSINESS
479FLA220011	DAF	5700 DEPT OF THE AIR FORCE	F20F3 ACC 42	GSA	4792 FEDERAL ACQUISITION SERVICE	FE25M	Professional Services	Technical & Engineering	General Engineering	TIER 2	A-DETAILED	NAS	8425	541716	OTHER THAN SMALL BUSINESS
479FLA220087	DAF	5700 DEPT OF THE AIR FORCE	F2ATSH 89 BIG ALL	GSA	4792 FEDERAL ACQUISITION SERVICE	FE25M	Professional Services	Technical & Engineering	General Engineering	TIER 2	C-DELIVERY ORDER	[None Indicated]	8425	541330	OTHER THAN SMALL BUSINESS
F2FF9R HO AF50C A	GSA	4792 FEDERAL ACQUISITION SERVICE	FE25M	Professional Services	Technical & Engineering	General Engineering	TIER 2	C-DELIVERY ORDER	[None Indicated]	8425	541330	OTHER THAN SMALL BUSINESS			
F2VU81 F2VU81 SO	GSA	4792 FEDERAL ACQUISITION SERVICE	FE25M	Professional Services	Technical & Engineering	General Engineering	TIER 2	C-DELIVERY ORDER	[None Indicated]	8425	541330	OTHER THAN SMALL BUSINESS			
F2VU82 HO	GSA	4792 FEDERAL ACQUISITION SERVICE	FE25M	Professional Services	Technical & Engineering	General Engineering	TIER 2	C-DELIVERY ORDER	[None Indicated]	8425	541330	OTHER THAN SMALL BUSINESS			
F2VU82 F2VU82 HO	GSA	4792 FEDERAL ACQUISITION SERVICE	FE25M	Professional Services	Technical & Engineering	General Engineering	TIER 2	C-DELIVERY ORDER	[None Indicated]	8425	541330	OTHER THAN SMALL BUSINESS			
F2VU82 F2VU82 HO	GSA	4792 FEDERAL ACQUISITION SERVICE	FE25M	Professional Services	Technical & Engineering	General Engineering	TIER 2	C-DELIVERY ORDER	[None Indicated]	8425	541330	OTHER THAN SMALL BUSINESS			

Category Group: Common (GWCM)

Level 1 Category: (All)

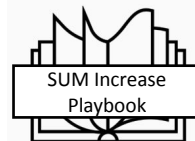
Level 2 Category: (All)

Level 3 Category: (All)



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# Part 2d: Identify Tier 0 and Expiring Awards Addressable to Govt.-wide Solutions



	P	Q	R	S	T	U	V	W	X	Y	Z	AA	AB	AC	AD	AE	AF	AG	AH	AI	AJ	AK	AL	AM	AN	AO	AP
1	Bic Addressable	Tier 2 Addressable	Product Or Service	Naics Code	Type Of Set	Vendor Name	Sheltered	W/Go Bus Size	Eight A Flag	Calculated H	Calculated S	Calculated S	Calculated V	Calculated W	Prepared By	Reference PI	PIID	Modification	Unique Award	Hierarchy Id	Day of Sign	Fiscal Year	Designated	Ultimate Completion Date	Final Idv Last Date	Day of Final	Dollars Obligated
2	NASA SEWP PROFESSIONAL R710			541519		CGI FEDERAL	NO	OTHER THAN	NO	N	N	N	N	N	LOUIS.GILDI	31310018DC	31310021FC	P00001	31310018DC	31310018DC	11/3/21	2022		4/30/22	1/31/23 0:00	4/30/22	#####
3	NASA SEWP PROFESSIONAL R710			541519			NO	OTHER THAN	NO	N	N	N	N	N	LOUIS.GILDI	31310018DC	31310018FC	P00017	31310018DC	31310018DC	1/26/22	2022		1/31/23	1/31/23 0:00	1/31/23	#####
4	OASIS; OAS 03FAC; ADA R425			541330	SBA	ADVANCED	NO	SMALL BUSI	NO	N	N	N	N	N	JRM6@NRC.GOV		31310020CC	P00007	31310020C0004		10/29/21	2022		3/31/25		3/31/25	#####
5	OASIS; OAS 03FAC; ADA R425			541330	SBA		NO	SMALL BUSI	NO	N	N	N	N	N	JRM6@NRC.GOV		31310020CC	P00010	31310020C0004		2/8/22	2022		3/31/25		3/31/25	#####
6	NASA SEWP PROFESSIONAL R710			541519			NO	OTHER THAN	NO	N	N	N	N	N	LOUIS.GILDI	31310018DC	31310018FC	P00019	31310018DC	31310018DC	1/28/22	2022		9/30/23	1/31/23 0:00	9/30/23	#####
7	Sched 70 HV MAS; Miller D399			541513			NO	SMALL BUSI	YES	N	Y	N	N	N	JENNENE.LIT	NRCHQ1017	31310018FC	P00009	NRCHQ1017	NRCHQ1017	3/10/22	2022	2016	4/22/23	9/24/22 0:00	4/22/23	#####

Analyzing the data after downloading the spreadsheet:

- Data related to expiration is found in the spreadsheet under the following columns:
  - Ultimate completion date; a custom field indicating the last expiration date of any award on an given IDV
  - Expiration date of the IDV (populated only if an Indefinite Delivery Vehicle)
  - Final completion date; a custom field indicating the last expiration date of any award on an given IDV
- Use data from columns titled “BIC Addressable” and “Tier 2 Addressable” to identify contracts that could possibly be moved to a BIC or Tier 2 solution. Use the steps in Part 1 to perform market research on tagged solutions.

# Playbook Details – Contract Reduction



This playbook helps agencies identify opportunities to reduce contracts, by highlighting potentially redundancies.

To identify the top vendors by total spend, contract count, and Tier 0, at your agency:

Step	Applicable Dashboard	
Step 1: Identify top vendors by spend	<a href="#">CM Reporting (CMR) Workbench</a>	Top-N Analysis
Step 2: Identify vendors with highest number of contracts		
Step 3: Identify vendors with most Tier 0 contracts		
Step 4: Identify vendors with most Tier 0 spend		
Step 5: Downloading Opportunities for Contract Reduction		Data Export from Awards Exploration Tool
Step 6: Validate target viability and engage acquisition community		

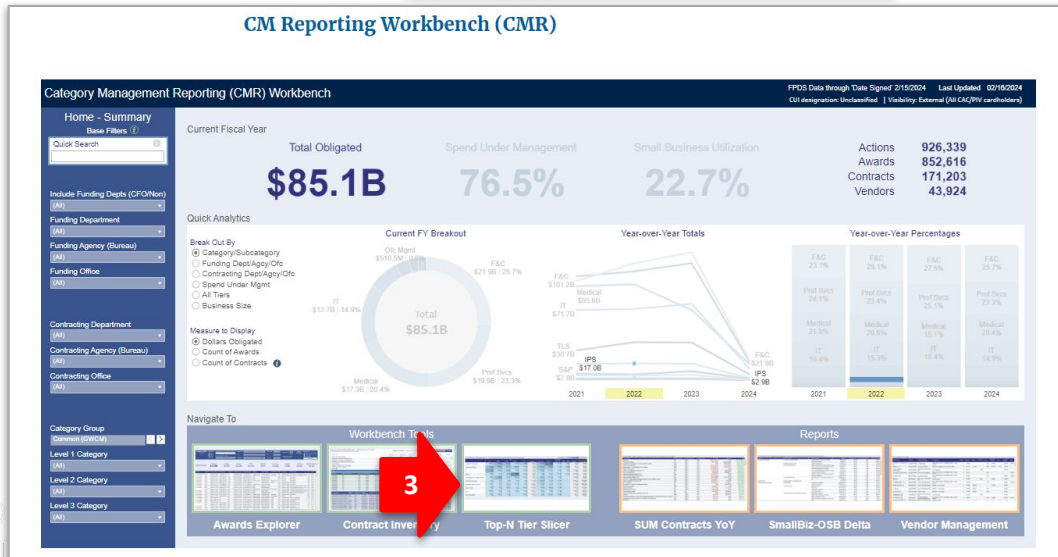
# Access the Top-N Analysis



**1** [Link to CM Reporting Workbench](#)

## Steps to access the Dashboard:

1. Click the link above
2. Click on “CM Reporting Workbench (CMR)”
3. Click “Top-N Tier Slicer” in the far right menu of the CMR home page



# Step 1: Identify Top Vendors by Spend

Category Management Reporting (CMR) Workbench

Home Awards Explorer Contract Inventory **Top-N Tier Slicer** SUM Contrs. YoY Small Biz/OSB Δ Vendor Mgmt

**Additional Filters for this View**

Fiscal Year: 2021 2022 2023 2024  
 Award Type: All Vendors  
 Business Size and Type: All Vendors

Page Controls: Top N: How many to display: 17,321  
 Break Out By: Vendor  
 Sort By: Obligated Dollars

**1** (points to Funding Department filter)

**3** (points to Page Controls)

**2** (points to Break Out By dropdown)

Top Vendors by Obligated Dollars

CORP.	BIC	TIER 2	SUM			Subtotal	T0 DC	T0 IDV	Unmanaged		Subtotal	Grand Total
			T2 SB	TIER 1	T1 SB				TO OTHER	TO PO		
TRIAID NATIONAL SECURITY, LLC		0.1%		99.9%		\$1.5B	100.0%				\$1.5B	100.0%
HUMANA MILITARY HEALTHCARE SERVICES, INC				100.0%		\$1.5B	100.0%				\$1.5B	100.0%
SCIENCE APPLICATIONS INTERNATIONAL CORPORATION	\$497.8M 34.1%	\$103.8M 7.1%		\$511.6M 35.1%	\$-25.4K 0.0%	\$1.1B 76.3%	\$101.2M 6.9%	\$239.7M 16.4%		\$4.9M 0.3%	\$345.8M 23.7%	\$1.5B 100.0%
SANDIA CORPORATION				100.0%		\$1.3B	100.0%				\$1.3B	100.0%
MCKESSON CORPORATION		\$1.2B 99.6%				\$1.2B		\$2.3M 0.2%		\$2.1M 0.2%	\$4.4M	\$1.2B 100.0%
SCHERING CORPORATION		\$59.9K 0.0%		\$7.0M 0.6%		\$7.1M 0.6%	\$0.00 0.0%	\$1.1B 99.4%			\$1.1B	\$1.1B 100.0%
CONSOLIDATED NUCLEAR SECURITY LLC				100.0%		\$1.1B	100.0%				\$1.1B	\$1.1B 100.0%
BOOZ ALLEN HAMILTON INC.	\$457.4M 46.9%	\$375.5M 38.3%		\$68.0M 5.0%		\$900.8M 100.0%	\$26.8M 2.7%	\$53.1M 5.4%		\$0.00 0.0%	\$79.9M 8.1%	\$980.7M 100.0%
FLUOR MARINE PROPULSION, LLC				100.0%		\$867.8M	100.0%				\$867.8M	\$867.8M 100.0%
DELL MARKETING L.P.	\$845.8M 100.0%					\$845.8M		\$-4.5K 0.0%		\$-1.2K 0.0%	\$-5.7M	\$845.8M 100.0%
QTC MEDICAL SERVICES, INC.				94.2%		\$730.5M	\$730.5M 94.2%	\$0.00	\$45.2M 5.8%	\$50.0K 0.0%	\$45.3M	\$730.5M 94.2%

**4** (points to download icon)

## [Link to CM Reporting Workbench](#)

Click on CMR, then click "Top-N Tier Slicer"

### Steps within Dashboard:

1. Filter to your Department
2. Select "Vendor" in the Break Out by Drop-Down
3. Select how many rows you want to display
4. Export data on top vendor(s)/contracts if needed
  - Click the download button > crosstab > Tier Slicer > CSV > Download



# Step 2: Identify Vendors with Highest Number of Contracts



## [Link to CM Reporting Workbench](#)

Click on CMR, then click "Top-N Tier Slicer"

### **Steps within Dashboard:**

1. Select "PIID Count" as display metric under "Sort By"
2. Click the bar of the vendor with most contracts in Top Vendor list to open a detailed information box
3. Export top vendor(s)/contracts for later use
  - You will have the choice to export the entire list or the detailed data of the vendor you select

Category Management Reporting (CMR) Workbench

Home Awards Explorer Contract Inventory Top-N Tier Slicer SUM Contrs. YoY Small Biz/OSB Δ Vendor Mgmt

Additional Filters for this View: Fiscal Year (2021, 2022, 2023, 2024), Award Type (All), Business Size and Type (All Vendors)

Page Controls: Top N: How many to display (17,321), Break Out By (Vendor), Sort By (PIID Count)

Top Vendors by PIID Count

	ER 2	T2 SB	TIER 1	T1 SB	Subtotal	TO DC	TO IDV	Unmanaged TO OTHER	TO PO	Subtotal	Grand Total
NATIONAL INDUSTRIES FOR THE BLIND	86.9K				86.9K					86.9K	100.0%
W. W. GRAINGER, INC.	62.2K				62.2K		0.1K		0.3K	62.5K	100.0%
AMERISOURCEBERGEN DRUG CORPORATION	1K	38.8K	10.8K		49.6K		0.0K		0.0K	49.6K	100.0%
NOBLE SALES CO., INC.	13.2K	3.7K	10.1K		26.9K		13.8K		0.4K	41.1K	100.0%
SCIENCE APPLICATIONS INTERNATIONAL CORPORATION	0.1K	0.9K	27.5K	0.0K	28.5K	0.0K	0.3K		0.2K	29.0K	100.0%
CARDINAL HEALTH 200, LLC	25.1K	2.4K			27.4K	0.0K	0.0K		0.0K	27.5K	100.0%
WRIGHT TOOL COMPANY	0.0K	21.7K			21.7K				0.4K	22.1K	100.0%
MONO MACHINES LLC	14.1K	5.8K			19.9K		0.7K		0.8K	20.7K	100.0%
LC INDUSTRIES, INC.	10.1K	1.3K	0.0K		11.4K		5.8K		0.0K	17.3K	100.0%
MSC INDUSTRIAL DIRECT CO., INC.	0.0K	14.8K	0.0K		14.9K		0.0K		0.0K	14.9K	100.0%
OWENS & MINOR DISTRIBUTION, INC.	14.2K	0.5K			14.6K		0.0K		0.0K	14.6K	100.0%



# Step 3: Identify Contracts for Vendors with Most Tier 0 Contracts



[Link to CM Reporting Workbench](#)

Click on CMR, then click "Top-N Tier Slicer"

## Steps within Dashboard:

1. Select all Tier 0 options by holding down the CTRL key on your keyboard and clicking each TIER 0 column header
2. The detailed data box will appear below and compile all the Tier 0 data broken out by Vendors with the most PIID counts
3. Export the detailed data by clicking the download button > crosstab > Top N **Detail** > CSV > Download

Category Management Reporting (CMR) Workbench

Home Awards Explorer Contract Inventory Top-N Tier Slicer SUM Contrs. YoY Small Biz/OSE Δ Vendor Mgmt

Top-N Tier Slicer

Additional Filters for this View: Fiscal Year (2021, 2022, 2023, 2024), Award Type (All), Business Size and Type (All Vendors)

Page Controls: Top N: How many to display (1-10), Break Out By (Vendor), Sort By (PIID Count)

Top Vendors by PIID Count: 0.0 (194.0)

	BIC	TIER 2	T2 SB	TIER 1	T1 SB	Subtotal	T0 DC	T0 IDV	T0 OTHER	T0 PO	Subtotal	Grand Total
AT&T MOBILITY LLC								0.2K	100.0%		0.2K	100.0%
PATRIOT TEAM		0.2K				0.2K					0.2K	100.0%
FEDEX CORPORATION		0.1K				0.1K					0.1K	100.0%
LOCKHEED MARTIN CORPORATION	0.0K			0.1K		0.1K	0.0K	0.0K		0.0K	0.1K	100.0%
NORTHROP GRUMMAN SYSTEMS CORPORATION	0.0K			0.0K		0.0K	0.0K	0.1K		0.0K	0.1K	100.0%

Selected Dimension (TopN - Business R - Contract Name) Description Of Requirement Vendor Name Award Type Pld Modificat. Year of Obligat.

ASRC COMMUNICATIONS, LTD.	TIER 0 - IDV	Total									\$10,330,963.37
	[None Indicated]		CAPE LAUNCH OPERATION AND INFRA.	ASRC COMMUNICATIONS, L.	B-IDC	FA25211E0001	P00059	FY 2024			\$0.00
			CAPE LAUNCH OPERATIONS AND INFRA.	ASRC COMMUNICATIONS, L.	C-DELIVERY O.	FA25211F0008	P00001	FY 2024			\$0.00
			CAPE LAUNCH OPERATIONS AND INFRASTRUCTURE SUPPORT	ASRC COMMUNICATIONS, LTD.	C-DELIVERY ORDER	FA252121F0016	P00022	FY 2024			\$2,665,962.87
						FA252121F0023	P00032	FY 2024			\$1,600,000.00
						FA252121F0031	P00016	FY 2024			\$26,000.00
						FA252121F0034	P00016	FY 2024			\$9,000.00
						FA252121F0037	P00028	FY 2024			\$70,000.00
						FA252121F0038	P00023	FY 2024			\$70,000.00
						FA252121F0061	P00012	FY 2024			\$0.00
						FA252121F0316	P00006	FY 2024			\$0.00
						FA252122F0031	P00009	FY 2024			\$0.00



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# Step 4: Identify Vendors with Most Tier 0 Spend



[Link to CM Reporting Workbench](#)

Click on CMR, then click  
“Top-N Tier Slicer”

Category Management Reporting (CMR) Workbench

Home Awards Explorer Contract Inventory Top-N Tier Slicer SUM Contrs. YoY Small B Vendor Mgmt

Top-N Tier Slicer

Additional Filters for this View: Fiscal Year (2021, 2022, 2023, 2024), Award Type (All), Business Size and Type (All Vendors)

Page Controls: Top N: How many to display (1, 17, 321), Break (Vendor), Sort By (Obligated Dollars)

Top Vendors by Obligated Dollars: -8,102,285 | 3,119,564,568

	BIC	TIER 2	T2 SB	TIER 1	T1 SB	Subtotal	T0 DC	T0 IDV	T0 OTHER	T0 PO	Subtotal	Grand Total
INGENIX PUBLIC SECTOR SOLUTIONS, INC.	\$-1.4M 6.9%			\$3.1B 100%		\$3.1B 100%		\$-2.3M -6.1%			\$-2.3M 8.1%	\$3.1B 100%
TRIWEST HEALTHCARE ALLIANCE CORP.		\$843.0K 0.1%		\$1.7B 100%		\$1.7B 100%						\$1.7B 100%
TRIAD NATIONAL SECURITY, LLC				\$1.5B 100%		\$1.5B 100%						\$1.5B 100%
HUMANA MILITARY HEALTHCARE SERVICES, INC.				\$1.5B 100%		\$1.5B 100%						\$1.5B 100%
SCIENCE APPLICATIONS INTERNATIONAL CORPORATION	\$497.6M	\$103.6M		\$511.6M	\$-25.4K	\$1.1B 100%	\$101.2M 6.9%	\$239.7M 16.4%		\$4.9M 0.3%	\$345.6M 100%	\$1.5B 100%

Selected Dimension (Total): Business R: Contract Name: Description Of Requirement: Vendor Name: Award Type: Ptd: Modificat.: Year of ...: Obligatee: \$1,202,347.34

Null (not identified in FPDS): TIER 0 - IDV: Total: [None Indicated]

Contract Name	Description Of Requirement	Vendor Name	Award Type	Ptd	Modificat.	Year of ...	Obligatee
AWARD FOR FUEL SUPPLY AND DELIV...			B-IDC	190R862D0006	P00005	FY 2024	\$0.00
CATHERINE CREEK & CLEAR CREEK S...			C-DELIVERY O	1240E24F0009	0	FY 2024	\$15,750.00
COMMUNITY NURSING HOME SERVICE			B-IDC	36C24924D0039	0	FY 2024	\$0.00
COMMUNITY NURSING HOME SERVICES			B-IDC	36C24924D0038	0	FY 2024	\$0.00
COMMUNITY NURSING HOME SERVICE...			B-IDC	36C24924D0040	0	FY 2024	\$0.00
COMMUNITY NURSING HOME SERVICE...			C-DELIVERY O	36C24624N427	0	FY 2024	\$1,161,828.00
COMMUNITY NURSING HOME SERVICE...			B-IDC	36C24624D0023	0	FY 2024	\$0.00
ED1402 - COMMUNITY NURSING HOM...			B-IDC	36C25921D0038	P00001	FY 2024	\$0.00
GENERAL CONSTRUCTION REPAIR AND UPGRADE OF USFK FACILITIES			B-IDC	W91QV24D0008	0	FY 2024	\$0.00
			B-IDC	W91QV24D0012	0	FY 2024	\$0.00
			B-IDC	W91QV24D0025	0	FY 2024	\$0.00

## Steps within Dashboard:

1. Select “Obligated Dollars” as display metric under “Sort By”
2. Click/unclick the “Unmanaged” header again to reload the detail data section.
3. Follow the same steps as the previous slide to download



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# Step 5: Downloading Opportunities for Contract Reduction



## [Link to CM Reporting Workbench](#)

Click on CMR, then click "Awards Explorer"

### Steps within Dashboard:

1. Click on the "Awards Explorer" tab at the top to navigate to the Awards Explorer
2. Under the "Vendor Name" filter found after clicking "More Filters":
  - o unselect All
  - o type in the vendor names (one by one) that you found in the previous slides
  - o check the box next to the vendor name as it appears in the drop down

### Optional

3. If you only want to analyze Tier 0 contracts, filter to only Tier 0 contracts using the Tier filter before downloading
4. Awards Explorer defaults to the current FY; select a different year(s) based on your needs

The screenshot shows the Awards Management Reporting (CMR) Workbench interface. Red arrows and numbers 1-4 indicate the steps described in the text:

- 1:** Points to the "Awards Explorer" tab at the top of the dashboard.
- 2:** Points to the "More Filters" button in the top right area.
- 3:** Points to the "More Award/Contract Filters" dropdown menu.
- 4:** Points to the "Fiscal Year" filter on the left side of the dashboard.

The dashboard displays a summary of obligations and awards, along with a table of contract details. The summary shows:

Data Summary	Obligated	Actions	Awards	PHIDs	RefPHIDs
	\$9.3B	12,832	10,473	10,411	3,028

The table below shows contract details with columns: RefPID, Funding D., Funding Agency/B., Funding Office, Contracting, Contracting Agency/, Contracting Office, Category, Level 2 Category, and Level 3 Category.



# Step 6: Validate Viability of Targets and Engage Acquisition Community



Final steps to evaluate vendors with the most spend and Tier 0 spend:

1. Open the downloaded spreadsheet and check the following columns to validate the contract is viable for migration to a higher tiered contract:
  - Description of Requirement
  - Prepared By
  - BIC/Tier 2 Addressability
  - Final/Ultimate Completion Date
2. Contact the Contracting POC listed with each contract (if email not listed, search Dept. directory), notify them of your objective and request their assistance with gathering information on the vendor's contract
3. Obtain a copy of the contract and evaluate the requirements and T&Cs
4. Contact the Program Office of the solution you want to migrate the spend to and request details of the product / service availability, T&Cs, and migration process.

These steps can help agencies identify opportunities that will improve their small business (SB) performance within specific SB sub-categories (women-owned, HubZone, etc.):

Step	Applicable Dashboard / File	
Step 1: Assess Agency SB Performance with the Small Business Scorecard Figures	<a href="#"><u>Performance Management Tools</u></a>	Small Business Dashboard
Step 2: Identify SB Sub-Category for Improvement		
Step 4: Export details of SB sub-category contracts		
Step 5: Assess category SB progress-to-goal (optional)		Executive Summary Dashboard

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



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# Step 1: Assess Department or Category Small Business Utilization



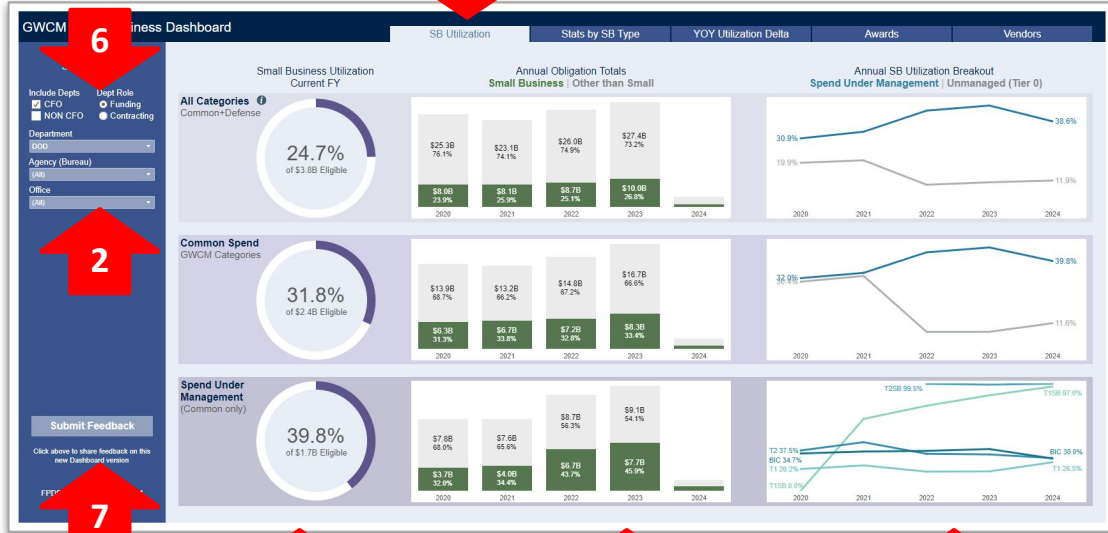
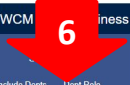
[Link to Oversight & Performance Management Tools](#)  
"Small Business Dashboard"

## Steps within Dashboard:

1. Click "SB Utilization" Tab
2. Filter to your Department, Agency, and or Office
3. Identify Small Business Utilization pie charts for Common + Defense Spend, Common Spend Only, and Spend Under Management
4. Identify annual dollar obligations by small business versus other than small business
5. Identify annual Small Business Utilization divided by SUM versus Tier 0 in the top two rows and by all tiers in the third row

## Optional

6. Toggle between CFO Act agencies or Non-CFO Act agencies, and funding or contracting agency
7. Submit feedback if you wish





# Step 2: Identify SB Sub-Category for Improvement

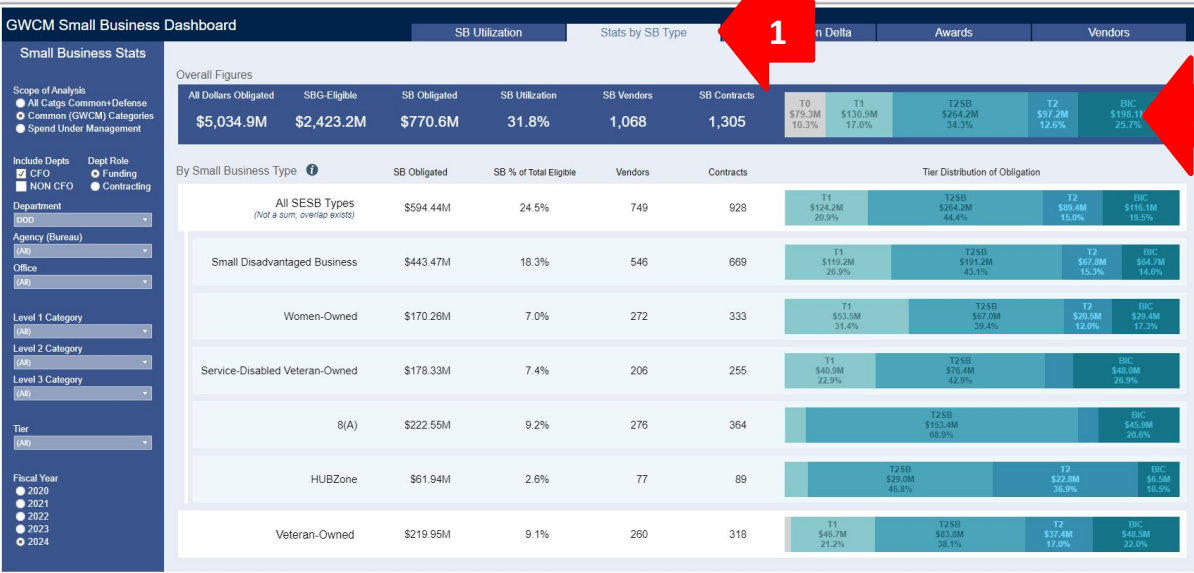


## [Link to Oversight & Performance Management Tools](#)

“Small Business Dashboard”

### Steps within Dashboard:

1. Click on “Vendor Type and Tier” Tab
2. Filters will pre-populate, adjust if necessary (Fiscal Year filter available)
3. Assess Overall SB Figures such as dollars obligated, dollars eligible, number of vendors, and contracts
4. Assess SB Figures broken out by socio-economic status
5. Assess dollars obligated and percentages broken out by Tiers for each socio-economic status





# Step 3: Identify SB Year over Year Utilization Delta by Category or Agency/Office

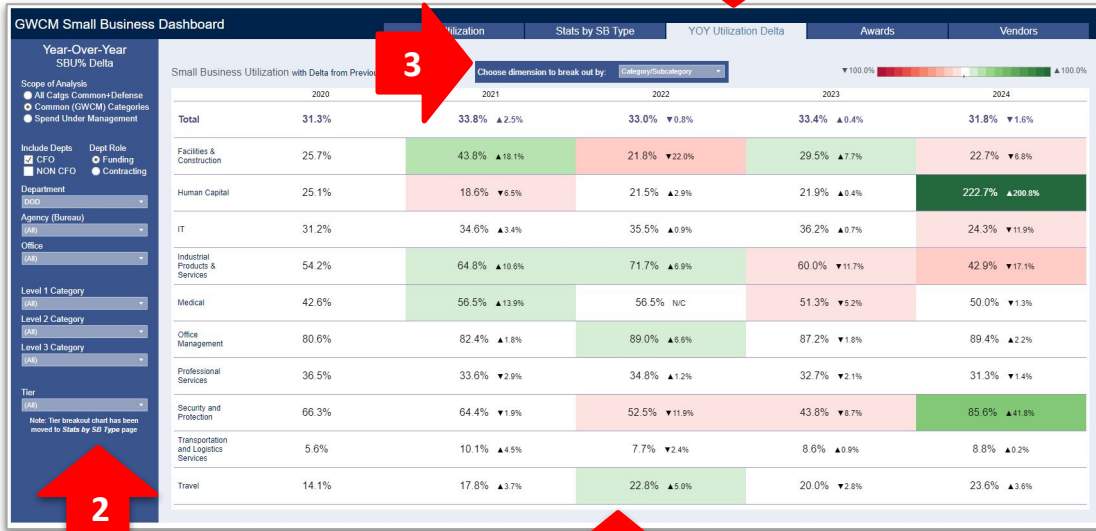
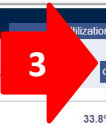


[Link to Performance Management Tools](#)  
"Small Business Dashboard"



## Steps within Dashboard:

1. Click "YoY Utilization Delta" Tab
2. Filters will pre-populate, adjust if necessary
3. Break Out by Category or Agency/Office
4. Assess the total change of SB dollars and percentage at the top row and per Category (or Agency/Office) in the following rows
  - Changes are further denoted by color, red indicating decreases and green indicating increases





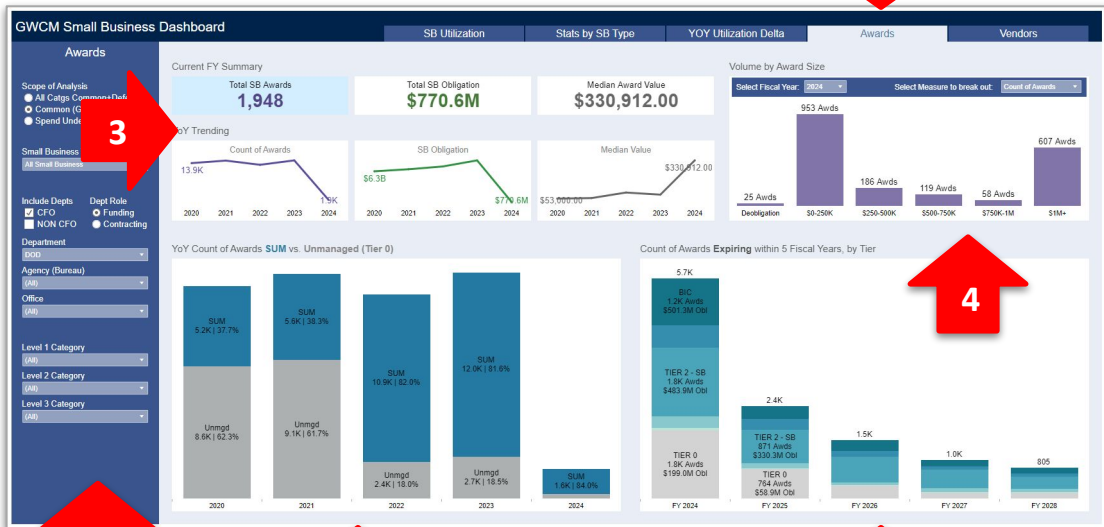
Return to Menu

# Step 4: Analyze SB Spend by Awards



[Link to Performance Management Tools](#)

“Small Business Dashboard”



## Steps within Dashboard:

1. Click “Awards” Tab
2. Filters will pre-populate, adjust if necessary
3. Analyze Total SB Awards and Median Award Value for the Current FY and YoY Trends
4. Analyze the distribution of SB awards across award size ranges and broken out by Count of Awards or by Dollars Obligated
5. Analyze the YoY distributions of SB by Spend Under Management versus Tier 0
6. Analyze the YoY distributions of expiring SB dollars obligated and number of awards
  - o Colors denote tiers





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# Step 5: Analyze SB Vendor Metrics



## [Link to Performance Management Tools](#)

“Small Business Dashboard”



1

### Steps within Dashboard:

1. Click “Vendors” Tab
2. Filters will pre-populate, adjust if necessary
3. Analyze Total SB Vendors and Average Award Value per Vendor for the Current FY and YoY Trends
4. Analyze the count of SB vendors across all socio-economic categories
  - o Fiscal Year filter is included for this box
5. Analyze the count of vendors broken out by SESB, SDB, and SB (non-SESB) for the current year and the YoY trends
6. Analyze the SB dollars obligated YoY broken out by SESB, SDB, and SB (non-SESB)



4



2



5



6



# Step 6: Assess Category Small Business Progress to Goal (Optional)



[Link to Performance Management Tools](#)  
 “Executive Summary Dashboard”

- Steps within Dashboard:**
1. Click “Category” tab
  2. Select the category you wish to assess
  3. Evaluate total SB year-over-year performance to goal

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VII. Appendix of Category Management Resources

# Questions & Wrap Up

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**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](mailto:govtwidecmdashboards@gsa.gov)**