

OUR MEETING WILL START AT 1 P.M.

This meeting will be recorded.

Continuous learning points (CLPs):

Yes! You will earn CLPs for this session; your email address (.gov only) has been captured during Zoom registration and will be submitted on your behalf. Please wait up to two weeks to receive credit.

Download today's presentation materials and session recording:

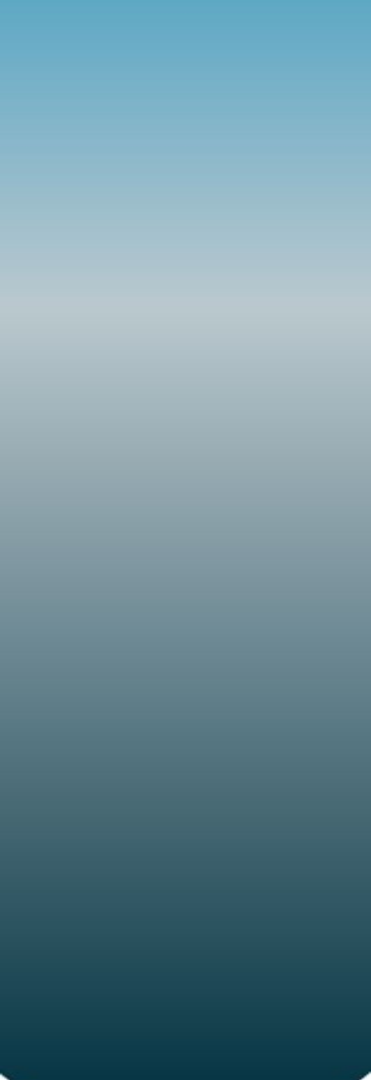
Visit the Acquisition Gateway - <https://acquisitiongateway.gov/Category-management/resources/4150>

Ask Questions:

Use the Zoom Q&A function to post your questions - participants are automatically in 'mute' mode.

Other CM training:

<https://acquisitiongateway.gov/Category-management/resources/4150>

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Agency Engagement Seminar: OMB Policy Showcase

June 25th, 2024

Agenda

- Introduction
 - Meredith Romley - Office of Federal Procurement Policy (OFPP), Office of Management and Budget (OMB)
 - Lesley Field - OFPP, OMB
- Enterprise-wide Licenses
 - Jennifer Kuk - OFPP, OMB
- Hi-Def
 - Kristen Wilson - OFPP, OMB
- Periodic Table of Acquisition Innovation
 - Kathleen Quinn - OFPP, OMB

OMB Kick Off

- Meredith Romley - OFPP, OMB
- Lesley Field - OFPP, OMB

Enterprise-wide Licenses

- Jennifer Kuk - OFPP, OMB

Microsoft ELA:

Challenges, Solutions, Outcomes

Goal: Greater value from agency spend & increased administrative efficiencies

Challenges



- Inconsistent terms and conditions across the government
- Inefficient buying across the government
- Up to 20 % price variance across the government
- Inconsistent security postures across the government.

Solutions



- Negotiate directly with Microsoft to establish (1) more favorable, standardized terms and conditions including those supporting cybersecurity risk management, and (2) a new governmentwide baseline price discount;

Outcomes



- Reduced price variance across the government
- Improved cybersecurity posture
- 25% buying efficiency gains
- More favorable terms and conditions
- More value

Our Approach

GOAL: Establish more favorable, standardized terms and conditions including those supporting cybersecurity risk management, and a new governmentwide baseline price discount.

- **Starts with requirements:** EVERY CFO Act agency provided their contract files, including pricing information
- **Need Subject Matter Experts:** Integrated Project Team (IPT) to identify the best terms, conditions, and pricing strategies.
- **Buy-in from requirements owner:** Had a CSAW with EVERY CFO Act agency represented and unanimously agreed to a set of terms and conditions.
- **Meetings with Microsoft with leadership support:** Senior leaders from OMB and GSA meet with Microsoft leadership regularly to continue pushing our message.

Organizing as an Enterprise

How we were able to get Microsoft to the Table

- Federal government only makes up 3% of Microsoft's business.
- Privity of contract is with Value Added Resellers, not Microsoft – Microsoft doesn't have to cooperate with us.
- Demonstrate government's commitment – CSAWs, leadership support, and agencies commitment to implement the outcome of this initiative signals to Microsoft that we are not backing off

Governmentwide Microsoft Acquisition Strategies

C-SAW Items for Consideration

Terms & Conditions

A set of contract clauses designed to enable better management of Microsoft subscription licensing via enhanced license mobility, reduction of license quantities, cloud consumption management and standardized reporting

Consensus:
7 out of 9
items

Cybersecurity

Identified product capability enhancements to bolster cybersecurity and reduce reliance on 3rd party products to secure the gaps in Microsoft's own defense

Consensus:
10 out of 12
items

Cost Reduction

A series of cost-related concessions and additional contract options that would save substantial taxpayer dollars, increase the value for dollars spent, and better protect customers from nefarious pricing tactics

Consensus:
8 out of 8
items

Lessons Learned

- Data is powerful.
- Leadership support is essential.
- Integrated project teams saves time in the long-run.
- CSAWs legitimizes your outcome.
- It is possible for the federal government to organize as an enterprise.

Continuous Iteration

- A few months ago, we surveyed CIOs and CAOs from the 24 CFO Act agencies to identify the next OEM to establish government-wide ELA
- Based on the results of the survey, the ITVMO will be starting **ServiceNow**
- Currently in the process of collecting contract files and pricing information. Deadline was June 21 but we are still missing a lot of data.
- Please help by making sure your agency submits their files to the ITVMO at itvmo@gasa.gov.



Hi-Def

DATA-DRIVEN ACQUISITION

Hi-Def Initiative Overview for Agencies

Kristen Wilson, OFPP, OMB



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DATA-DRIVEN ACQUISITION

OMB Circular and Hi-Def Initiative

Connecting the dots between the Hi-Def Initiative and the BCI, OMB Circular, and Procurement Co-Pilot

Better Contracting Initiative (BCI)

1. Leveraging Data Across Federal Agencies

2. Negotiating Common Enterprise-Wide Software Licenses

3. Getting Contract Requirements Right the First Time

4. Getting Better Value from Sole Source and Other High-Risk Contracts

[OMB Circular A-137:](#)
Strategic Management of Acquisition Data and Information

Hi-Def Initiative
Framework + Environment



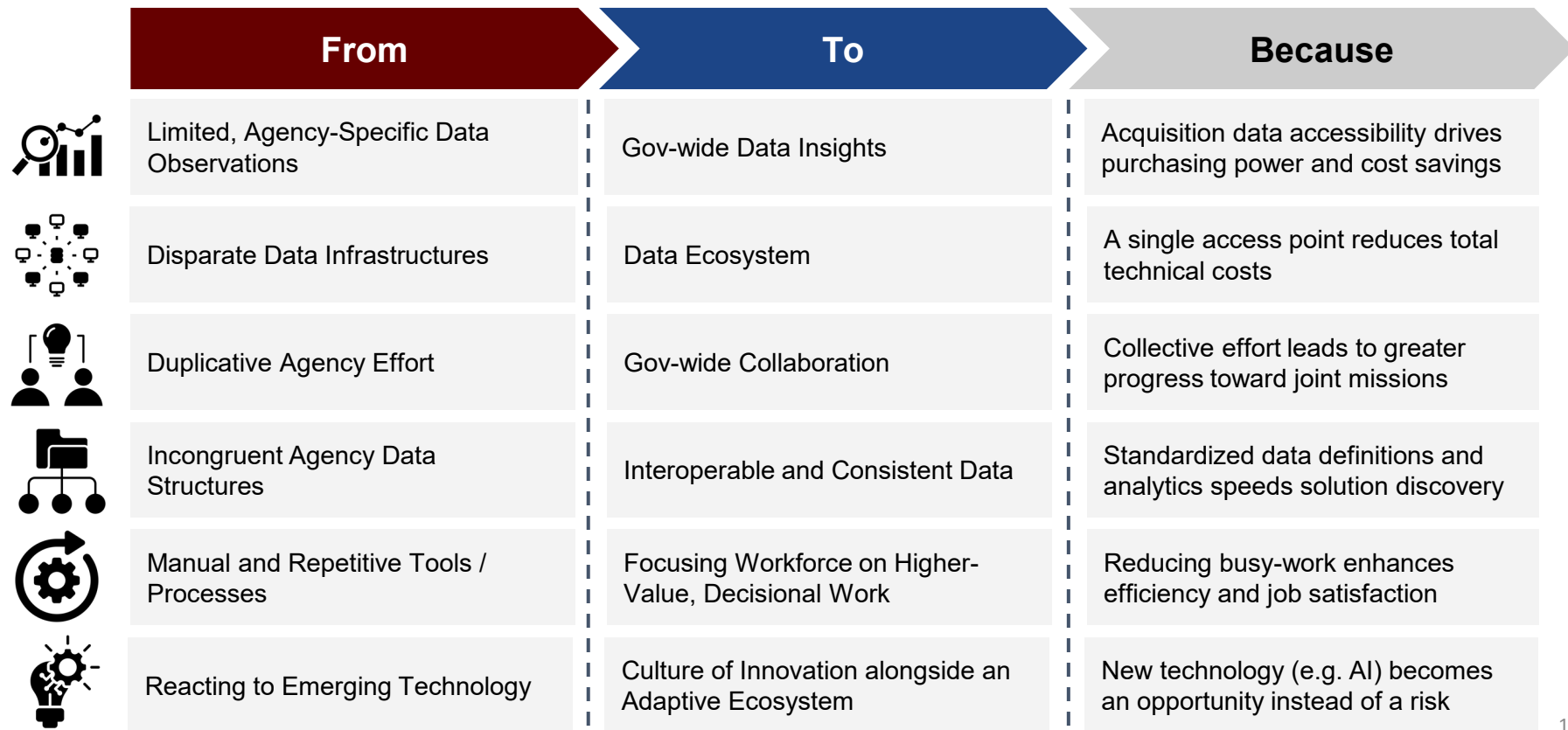
Procurement Co-Pilot
First of its kind government-wide Market Research tool, powered by Hi-Def



Hi-Def

DATA-DRIVEN ACQUISITION

Connecting the dots through Hi-Def





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DATA-DRIVEN ACQUISITION

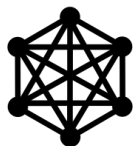
Hi-Def Initiative Overview

The Hi-Def Initiative will achieve its targeted outcomes through multiple efforts. The Hi-Def Framework and Environment will operationalize Hi-Def, while the Procurement Co-Pilot is a proof of concept of the power of Hi-Def data

Hi-Def Initiative Efforts



The Hi-Def Framework will provide a coordinated, government-wide approach to accessing, using, and managing acquisition data. OMB is spearheading the many policy components of this framework.



The Hi-Def Environment will be a core component of this framework. It will enable the development and deployment of innovative data products and tools that use gov-wide data to support the acquisition lifecycle.



The Procurement Co-Pilot is a market research tool that provides unparalleled access to gov-wide prices paid contract data for products and demonstrates the power and potential of gov-wide acquisition data in a future Hi-Def Environment.

Hi-Def Initial Targeted Outcomes

1. Improved Market Research
2. Supply Chain & Demand Management Insights
3. Vendor Management & Engagement Support
4. Streamlined Requirement Definition & Solicitation Development
5. Enhanced Contract Evaluation



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DATA-DRIVEN ACQUISITION

Responsibilities under Circular A-137

Requirements for OMB

1. Require information and data sharing, including engaging the FAR council for any needed regulatory amendments to support the sharing of data.
2. Provide direction to the agencies for both the Baseline Assessment and the Annual Strategic Planning efforts.
3. Prioritize data collection efforts and targeted data sets to ensure reasonable and orderly collection of data from the agencies.
4. Facilitate the development of a comprehensive Hi-Def data governance plan.
5. Facilitate the development of data standards, in coordination with both existing and new governance structures as needed.
6. Establish a Federal acquisition data training curriculum addressing best practices and policies for data entry, data sharing, data use, and the current landscape of gov-wide tools and resources.
7. Support the development data sharing agreements and templates to expedite data sharing into the Hi-Def environment.



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Responsibilities under Circular A-137

Requirements Of All Agencies

1. Develop a strategic plan to prioritize and resource acquisition data management activities
2. Integrate best business practices into agency data strategy for data generation, collection, use, etc.
3. Collect data centrally and be prepared, upon request by OMB, to **share acquisition data into the HDE, including the relevant context and security protocols required, on an agreed upon cadence.**
4. Actively contribute to existing knowledge portals on innovative techniques and emerging technology.
5. Support expansion, implementation, and promotion of acquisition data management training and certification efforts for the acquisition workforce.

GSA's Managing Agency Requirements

1. **Managing the technical architecture and planned capabilities for the Hi-Def Environment**
2. Maintaining a sustainable support function to address the Circular's program management elements
3. **Coordinating with agencies to define an acceptable set of data security standards for the transfer, storage, and use of Hi-Def data through data sharing agreements**
4. Monitoring use and adoption for the Hi-Def Environment.



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Agency Baseline Assessments Overview and Process

The Hi-Def team is currently developing materials to successfully roll out the upcoming agency Baseline Assessments, which will support future Hi-Def Strategy and HDE development.

Baseline Assessment Overview

Requirement: Within one year of the effective date of the OMB Circular, agencies will perform an initial one-time baseline assessment of their acquisition data management capabilities.

Purpose: The Baseline Assessments will provide an initial picture of the current state of agency data domains, processes, and capabilities. This will inform Hi-Def initiative planning by helping to refine HDE requirements, prioritize functionality, and align on initial data standards.

Deployment Process

- 1. The Hi-Def Team will provide agencies with a **template** to input their responses.** This will be modeled on successful Category Management assessments.
- 2. The Hi-Def Team is targeting September to share the Baseline Assessment Template** with agencies. They will then have until January to complete it.
- 3. The Hi-Def Team will support agencies through template rollout** and completion.

Hi-Def has clearly outlined agency next steps on the [Hi-Def Webpage](#) and in [initial agency engagement materials](#)



OMB Circular A-137 Agency Key Responsibilities

The Strategic Management of Acquisition Data and Information Circular sets forth a responsibility for agencies to develop a baseline assessment and subsequent annual strategic plans to prioritize and resource their acquisition data mgmt. activities

Baseline Assessments

A one-time assessment demonstrating an agency's current acquisition data management capabilities, based on a template provided by OMB.

Purpose:

1. Provide an initial picture of the current-state of data, data collection processes, and capabilities across agencies.
2. Uncover gaps within individual agencies. These findings can be used to inform how agencies set up their Hi-Def processes/ annual strategic plans to address gaps and make progress.

Required agency actions:

- Perform this assessment once, within one year of the effective date of the Circular, based on a template provided by OMB.
- Appoint an official responsible for submitting the baseline assessment and subsequent annual strategic plans.

Required Hi-Def team/OMB actions:

Create a template that agencies can fill out for baseline assessments, share with agencies.

Annual Strategic Plans

An annual requirement for agencies to prioritize and resource their Hi Def data management activities, consistent with direction from OMB. This can either include incorporation of Hi-Def initiatives into current strategic plans, or development of Hi-Def-specific strategic plans.

Purpose: Demonstrate each agency's commitment to, and progress towards, meeting Hi-Def data sharing and other strategic objectives.

Required agency actions:

- One year after the initial baseline assessment, and yearly: Evaluate / document the results of assessments and any new agency policies, processes, and tools to support agency budget planning and investment discussions, using the template provided.

Required Hi-Def team/OMB actions:

Create a template that agencies can fill out for annual strategic plans, share with agencies.



What's next for the Hi-Def Circular?

What we're working on:

1. Finalizing our funding strategy for the build of the Hi-Def environment.
2. Preparing the initial draft Hi-Def Baseline Assessment template for agency review.
3. Final sprint for the launch of the full version of Procurement Co-Pilot.
4. Initial draft of the Hi-Def data governance plan for SME review.

What agencies should be thinking about:

1. **Identify a Hi-Def Accountable official:** This individual will be the primary point of contact for coordinating with OMB and the Hi-Def Managing Agency on functions that include (but are not limited to): use case identification, dataset prioritization, submission of the baseline assessment and annual Hi-Def plans, and sharing Hi-Def updates with agency stakeholders.
2. **Hi-Def awareness:** Let the workforce know that the Circular is out, and that we'll soon be engaging for the baseline assessment. The assessment will cover multiple roles, including CAO, SPE, CIO and CDO domains.
3. **Identify agency Hi-Def stakeholders:** We're collecting the names, roles, and contact information for stakeholders who want to stay engaged with the Hi-Def program. Please send any names to Kristen.H.Wilson@omb.eop.gov (they can also reach out directly).
4. **Identify and avoid any T&Cs** that prohibit the sharing of data for Federal use, unless required by law.
5. **Procurement Co-Pilot Launch:** The Hi-Def PMO will launch the full version of Procurement Co-Pilot in June! You can access this new tool at <https://acquisitiongateway.gov/co-pilot/> (authentication required).



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Hi-Def Resources

- [Circular A-137: Strategic Management of Acquisition Data and Information](#)
- [Fact Sheet for Circular A-137 Procurement Co-Pilot Introduction Video](#)
- [Hi-Def Website](#) (Overview, Targeted Outcomes, Governance, etc)
- We want your feedback! [Submit online](#), or via [email](#) to hidef@gsa.gov
- Please reach out to [Kristen Wilson](#) if you'd like a Hi-Def briefing for your agency.



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DATA-DRIVEN ACQUISITION

Objective and Target Users

Objectives:

- Improve the efficiency and quality of market research
- Provide unparalleled access to gov-wide prices paid contract data for products
- Demonstrate the power and potential of gov-wide acquisition data in a future Hi-Def environment

The Procurement Co-Pilot has three Primary User Groups



**Contract
Specialists**



**Contracting
Officers**



Agency Buyers
(e.g., Mid-Level Program Office Rep.)

All three of these stakeholder groups collaborate on **conducting market research for acquisitions**. While the specific tasks that each individual performs will differ depending on the organization and the nature of the acquisition, they will need to: **1) Research Product Pricing, 2) Search for Vendors, and 3) Find Contract Vehicles**



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Key Product Features & User Benefits



Procurement
Co-Pilot

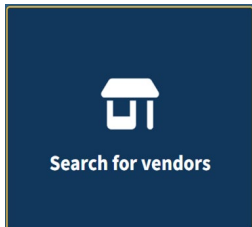
Without the Procurement Co-Pilot



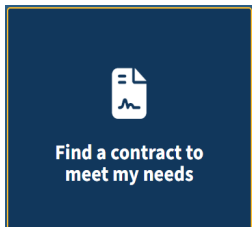
With the Procurement Co-Pilot



Research Product
Pricing



Search for vendors



Find a contract to
meet my needs

- **Limited/no visibility** into what other customers have paid for a product I need to buy
- **No idea if I'm getting a good deal** from industry
- **Difficult and time intensive** to figure out which contracting vehicles a vendor of interest is available on and what kinds of work they have previously performed
- **Need to search in multiple places** to figure out which existing SUM/BIC contracting vehicles are available for use and applicable to my needs

- **Tap into actual prices paid** data from BIC and MAS contracts to **significantly improve** my cost estimation and negotiation capabilities
- **Quickly learn** about the capabilities and past contracting activity of a vendor of interest, and identify contracting vehicles for accessing them
- **Create a shortlist** of potentially relevant contracting vehicles **in an instant** with a quick search by relevant NAICS or PSC, or by directly entering my expiring PIID



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Research product pricing



Research Product Pricing

Get unparalleled access to prices paid data for products

Enhance your market research by tapping into prices paid data from across the Government to:

- ✓ Improve solicitations with more realistic cost estimates
- ✓ Compare contract vehicles for awarded price to identify a best value solution for common products
- ✓ Use historical trends to discover the best time to buy
- ✓ Realize cost avoidance, saving your agency and taxpayers money

MICROSOFT SURFACE STUDIO ALL IN ONE COMPUTER INTEL CORE I7 6TH GEN I7 6820HQ				
MANUFACTURER	MFR. PART #	UNITS		
Microsoft	45U00001	Each		
↓ Avg Price	↓ Min Price	🏢 Commercial Price	📊 Avg Savings	📅 Best Time to Buy
\$3,610.53	\$3,252.87	\$8,226.54	\$4,616.01	Q3
Order Size Analysis				
SM	5 or less	MD	(6 - 49)	
\$3,789.36	Avg Price	\$3,252.87	Avg Price	
Award Vehicle				
Award vehicle			Avg Price	
NASA SEWP			\$3,610.53	

Functionality and Features:

Filter by:

- Manufacturer Name
- PSC
- Level 1-5 Category
- Total Price

Identify:

- Avg. Price & Savings
- Best Time to Buy
- Order Size Discounts
- Potential Award Vehicles



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DATA-DRIVEN ACQUISITION

New! Product Comparisons



Research Product Pricing

Compare pricing on multiple comparable products

Simplify product research through comparisons in one interface

- ✓ Quickly assess price differentials across similar products
- ✓ Examine price ranges including minimum, maximum, and commercial pricing averages (when available)
- ✓ Compare an unlimited number of products
- ✓ Quickly add products to the Market Research List to find available contracts that could fulfil product needs

Comparison tool

Manage the products you're comparing

Make changes by selecting and deselecting items. Leaving the page will save your selections.

	☒ DELL LATITUDE 5540 STANDARD	☒ DELL LATITUDE 5530 LAPTOP 15 I7 32GB 512GB 2...
Quantity	6	100
Avg price	\$1,167.60	\$1,506.03
Line item total	N/A	N/A
Min price	\$125.52	\$509.79
Max price	\$3,778.24	\$4,477.00
Commercial price	N/A	N/A



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DATA-DRIVEN ACQUISITION

Search for vendors



Search for vendors

See a vendor's summary of their Federal experience in one place

Enhance your market research by reviewing a vendor's Federal Government engagements across categories and agencies to:

- ✓ Understand a vendor's capabilities by researching historical/ ongoing contracts
- ✓ Identify what contracts a vendor is on and learn more about the specifics of that contract to see if it could meet your procurement needs

In a future release the Procurement Co-Pilot will enable users to see the landscape of potential vendors that can meet their procurement needs, by delivering capabilities contained in the [Gov-Wide Procurement Equity Tool](#)

DELOITTE FINANCIAL ADVISORY SERVICES LLP

Total Obligated Dollars

\$156,021,695.23

UEI

XGEYUR1V3F75

Find Vendor on These Contracts

Click to Filter

Tier	Contract Id	Contract name	Managing agency	Obligated amount
TIER 2	47Q8MA19D08PL	SCHEDULE 36 - THE OFFICE, IMAGING, AND DOCUMENT SOLUTION	GSA	\$38,848,472.30
TIER 1	DJ113C2440	AUTOMATED LITIGATION SUPPORT SERVICES	DOJ	\$16,634,543.01
TIER 0 - IDV	TOS12D0002	SANCTIONS SUPPORT	TREASURY	\$0.00

Functionality and Features:

View and Filter by:

- Level 1 Category
- Contract Name
- Managing Agency
- Tier

Identify:

- Total Obligated Dollars
- Contracts in use by the Vendor
- Contract Tier and ID



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DATA-DRIVEN ACQUISITION

Find a contract to meet my needs



Find a contract to meet my needs

Enhance your market research by obtaining insights into contracts used across the Government to:

- ✓ Find key information on the types of products and services procured on contracts to identify contracts with similar requirements that could meet your needs
- ✓ Identify vendor diversity on award vehicles to inform acquisition strategy (e.g., potential set asides)
- ✓ Search for contracts that are expiring and identify Best-In-Class (BIC) or Tier 2 contracts to consider transitioning

Obtain insights into contracts that may meet procurement needs

EAGLE II					
PIID'S UNDER CONTRACT		PSC'S	NAICS	OBLIGATED DOLLARS	
70RTAC18FR0000048		D399	518210	\$9,582,520.57	
Master Piid	Tier	Dollars Obligated		Department	Date Signed
HSHQDC13DE2032	TIER 1	\$9,582,520.57		HOMELAND SECURITY, DEPARTMENT OF	04/07/2019
				Expiration Date	09/08/2020

Transition to New Contract Vehicle

Using One of These Potentially Addressable Contracts

Contract Name	Tier
Sched 70 HW SW	BIC
NASA SEWP	BIC

Vendors

Vendors	Business size
NORTHROP GRUMMAN SYSTEMS CORPORATION	N/A
ACCENTURE FEDERAL SERVICES LLC	N/A
KNIGHT POINT SYSTEMS, LLC	SB, SDVOSB, VOSB

Functionality and Features:

View and Filter by:

- Managing Agency
- Tier
- Contract Expiration
- Vendor Business Designation

Search by and Identify:

- Contract Name
- NAICS
- PSC
- PIID



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DATA-DRIVEN ACQUISITION

New! Market Research List



Find a contract to meet my needs

Quickly assess gov-wide ability to fulfill requirements

Enhance your market research by obtaining insights into contracts used across the Government to:

- ✓ Add multiple products to a market research list
- ✓ Assess the extent to which government-wide vehicles can meet agency requirements based on actual purchases
- ✓ Assess contract volumes to determine how often products are successfully sold
- ✓ Coming soon: Direct pass from Contract Name to Contract site on AG Solution Finder

Market Research List

Contract Vehicle Insights

Contract Vehicle Insights are based on prices paid data from these contract vehicles and do not guarantee current or future availability of these products.

NASA SEWP

Product List Match Rate ⓘ
100%

Orders
68

Total order value
\$642,767.62

MAS Schedule

Product List Match Rate ⓘ
50%

Orders
224

Total order value
\$592,965.76

Sched 70 HW SW

Product List Match Rate ⓘ
50%

Orders
192

Total order value
\$805,465.38

Army CHES ADMC2

Product List Match Rate ⓘ
50%

Orders
156

Total order value
\$5,191,570.22

Product List

Download

Product description	Quantity	Avg price	Line item total	Min price	Max price	Commercial price	MAS Schedul
✓ HP USB C DOCK G5 Hewlett Packard 5TW10AARABA Each	1	\$195.84	\$195.84	\$115.00	\$247.91	\$195.84	✓
✓ CLIN 223 HP 650 15 6 LAPTOP G10 RCTO I7 1365U 32GB 512GB SSD BL Hewlett Packard 7952V Each	1	\$679.54	\$679.54	\$25.00	\$20,178.93	\$679.54	
Grand Totals			\$875.38				



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Procurement Co-Pilot Resources

- [Procurement Co-Pilot Landing Page](#) (FAQs, Fact Sheet, Release Notes, Links to Training)
- [Procurement Co-Pilot Introduction Video](#)
- We want your feedback! [Submit online](#), or via [email](#) to hidef@gsa.gov
- Please share Procurement Co-Pilot with your workforce!

Periodic Table of Acquisition Innovation (PTAI)

- Kathleen Quinn – OFPP, OMB

Live Demo of the PTAI

PTAI Back Up Slides

Benefits of Use

- Government-wide collection of implemented innovative techniques
- Examples span the entire acquisition life cycle
- Examples are reviewed by teams of experts
- Templates, examples, links to training podcasts are examples of provided resources

PTAI

[Government-wide Initiatives](#) [Tools & Resources](#) [Training](#) [External Resources](#)

[Home](#) / The Periodic Table of Acquisition Innovations (PTAI)!

The Periodic Table of Acquisition Innovations (PTAI)!



Periodic Table of Acquisition Innovations
Acquisition Techniques

Acquisition Techniques

[Alternative Authorities](#)
[Market Research](#)
[Solicitation](#)
[Evaluation](#)
[Award](#)
[Post Award](#)



Periodic Table of Acquisition Innovations
Acquisition Automations

Acquisition Automations

[Cultural Adaptation Journey](#)
[Market Research](#)
[Solicitation](#)
[Evaluation](#)
[Award](#)
[Post Award](#)



Periodic Table of Acquisition Innovations
Frequently Asked Questions

About Our New Home

[PTAI Frequently Asked Questions \(FAQs\)](#)

Example Card

Market Research

Share

Affordability	+
Facilitated Requirements ...	+
Interactive Q&A	+
One on Ones	+
Reverse Industry Day	+
*New! Demonstrations	—
*NEW! Demonstrations	

*NEW! Demonstrations

This technique promotes early engagement with industry during market research and requirements development. Demonstrations will help government teams better understand what is available in the marketplace to enhance requirements development. The Government can obtain feedback from industry to better understand and capture the upcoming acquisition needs and challenges. Demonstrations allow industry to present capabilities and innovations during requirements development and acquisition planning.

The purpose of the Demonstrations technique is to leverage the Government's market research by engaging with industry early in requirements development to ascertain market innovations and capabilities. Using this technique during the market research phase of the acquisition process provides industry an opportunity to present new capabilities and innovations the Government may not have been aware of or considered. As a result, demonstrations will help the government teams better understand what is available in the marketplace to enhance requirements development. This technique also enables the government to see what capabilities are needed and/or important for stakeholders and the end user experience.

Demonstrations can be conducted virtually or in-person and can be a part of the Request for Information and/or one-on-ones with industry.

Problems Solved

Across the federal government, teams struggle to obtain clear and consistent market research documentation on a regular basis. Often market research documentation is inadequate, inconsistent, and unclear. The market research outcome should represent an understanding of the market and any future impacts. Demonstrations will enhance the market research report and overall acquisition planning. Demonstrations are one of many techniques available to acquisition teams to engage early with industry and conduct market research.

Benefits of Use

- Provides awareness of the offerings in the marketplace, vendor capabilities, industry ideas and perspectives as well as upcoming marketplace innovations.
- Offers industry opportunity to help Government address challenges and offer solutions otherwise unknown or not considered early in the requirements development.
- Allows for the government to make more informed decisions during acquisition planning.
- Supports Office of Management and Budget (OMB) Memorandum M-23-11, Creating a More Diverse and Resilient Federal Marketplace through Increased Participation of New and Recent Entrants, which requires that agencies increase their management attention on new entrant participation in the Federal marketplace, and especially on small business entrants.
- Allows teams to view new innovations in the marketplace. Since it is market research, there is no need to assign ratings or formally evaluate the demonstrations. This technique reflects business practices consistent with the Federal Acquisition Regulation (FAR).

Use Cases and Sample Documents

- USGC [Artifacts](#).
- Sample: DHS CBP X-Ray Strategic Sourcing Vehicle RFI [SAM.gov](#)

[I've used this technique.](#)

Sample language from DHS RFI

U.S. Customs and Border Protection is pleased to share the draft solicitation submission instructions and evaluation criteria relevant to a future official solicitation for the X-Ray system and sub-systems.

CBP is seeking industry feedback on the draft solicitation to assist with the refinement of these program requirements in support of the development of a final solicitation, which is expected to be issued in the first quarter of 2022. More specifically, CBP is looking for comments regarding the evaluation criteria contained in this draft as well as responses to Questionnaires A,B and C. We would like to note that the questions highlighted in yellow are the most important (especially 11.5B and 12.5B), but if the vendor community has time to complete the non-highlighted lines then it is appreciated.



Interested vendors are encouraged to schedule a brief (15 minutes) interactive video presentation of their system or systems with CBP. Please submit the meeting invite to Aga Frys at aga.frys@cbp.dhs.gov. The timeframe for these presentations is January 10 – 12 between 9 and 4 PM ET. The timeframe may be revised depending on the number of requests received. The video chat and product demonstration should display a production ready system functioning in a real-time operating environment. During the video presentation, vendors should be ready to provide objective evidence, including a product demonstration during a live video chat, that proves that the proposed system is currently ready, deployable and will not require additional engineering development effort. The vendors should include an explanation of the manufacturer's production capability, delivery lead time, and photographs, and radiographic images of the proposed integrated system or components and the graphical user interface of the

GAO Resources

Commercial Simplified De...	+
Discovery	+
Enhanced Contract Type C...	+
Fusion Procurements	+
HTRO -RP	—
HTRO-RP	
Modular Contracting	+
On/off ramp	+
Rates Only for Pricing Eval...	+
Remote Acquisitions	+
Self Scoring Model	+

This practice allows award to the highest technically rated offer that is also found to have a reasonable price without using trade-offs between cost or price and technical. This practice ranks or rates offerors according to technical factors following either the Self Scoring Model or a government technical evaluation. Price evaluation of only the highest ranked or rated offer proceeds next. Price reasonableness can be determined through various techniques such as benchmarking or statistical analysis (within one standard deviation of offeror distribution, for example). If the offeror's price is not determined to be fair and reasonable, the offer is rejected and the next highest ranked or rated offer is evaluated until award can be made to the highest ranked or rated offeror with a fair and reasonable price.

Agencies have successfully used this technique in FAR 15 and FAR 16.5 procurements. Not recommended for acquisitions where cost is a significant consideration. Also not recommended for FAR Part 8 actions because of statutory and regulatory requirement that best value determinations result in the lowest overall cost alternative (considering price, special features, administrative costs, etc.).

Problems Solved

- Promotes efficiency in acquisition through a streamlined selection decision, especially for knowledge based services where technical ability is of paramount concern to the point that cost is not used as a comparative discriminator among offerors.
- Allows technical capability to be prioritized over price and/or cost without requiring explicit trade-offs between technical and cost that are not likely to change the outcome.
- Ensures proposed pricing is more accurately associated with proposed quality of work.

Benefits of Use

- Simplifies the best value determination; provides a streamlined means to make award to the highest technically rated offeror.
- Accelerates time to award. An agency reported an award time of 79 days after release of the solicitation compared to 268 days for a comparable procurement.

Use Case and Documentation

- [Presentation Deck: AIA USAF HTRO-RRP.pdf](#)
- [GAO decision: B-418796.pdf](#)
- [Solicitation: USAID EPRR \(p. 92\).pdf](#)
- [Solicitation: VA CEDAR IDIQ \(para E.8 on p. 102\)](#)
- [GAO decision: B-413559.pdf](#)

Related Cards

- [Self Scoring Model](#)
- [Comparative Evaluation](#)

Submit New Ideas!

PTAI Frequently Asked Questions (FAQs)

Share 

Why the PTAI moved? +

Can I still access all content? +

Can I submit feedback? -

Can I access the old layout? +

What if I have issues? +

New features on the PTAI? +

More acquisition innovatio... +

Q: Can I still submit feedback or new information about acquisition innovations?

Answer:

Yes, your insights are incredibly important to us! Use the blue feedback buttons on the right of this page to share your feedback.

We eagerly await your contributions and thank you for your engagement with us!

Feedback & Submit New
Innovation Form

Request the addition of
new acquisition techniques
or automations

Suggest new artifacts,
documents, or use cases for
inclusion

I've used this! Share your
experiences and feedback
on techniques and
automations that you've
used

Request updates to existing
information about
innovative techniques and
automations

Searchable PDF File Format

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Can I submit feedback?	+
Can I access the old layout?	-
What if I have issues?	+
New features on the PTAI?	+
More acquisition innovatio...	+

Q: Can I still access and use the legacy PTAI site because I prefer its layout?

Answer:

While the legacy PTAI site is no longer available for use, we recognize the familiarity and ease of use the previous layout offered users. To honor this, The Lab at the Department of Commerce has created a document called the [PTAI PDF Playbook](#) that captures the look and feel of the legacy site. The playbook can be found on The Lab's Resources page [here](#).

The [PTAI PDF Playbook](#) includes key screenshots and links to archived user resources, allowing you to find information quickly in the styling of the legacy site while you get accustomed to the new interface. The playbook also provides an additional feature which allows you to search, by keyword or phrase, across the entire catalog of documents that comprise the PTAI.

Disclaimer: the PTAI PDF Playbook will be updated quarterly to match website content.



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This brand new credential:

- Comprises 9 hours of training spanning 8 courses;
- Covers essential aspects of CM, including processes and practices, governance and regulatory structures, and available tools and dashboards
- Counts toward agencies' training KPI goals and CM Maturity Framework ratings

Find out more and register for courses [here](#).

Thank you & Close-out

As a reminder, attendees of today's session will receive 1.5 CLPs. Please allow at least two weeks to receive credit

General CM questions: category.management@gsa.gov

Questions about data/dashboards: govtwideCMdashboards@gsa.gov

More CM Learning Resources:

- CM policies and guidance

<https://acquisitiongateway.gov/Category-management/resources/4161>

- Quick-Play Guides

<https://acquisitiongateway.gov/Category-management/resources/4156>

- Govt.-wide CM Program Retrospective

<https://acquisitiongateway.gov/Category-management/resources/4918>

- Find additional CM training on the [Acquisition Gateway](#)