**CSAW STEP ZERO ASSESSMENT**

Completing this assessment will give the CSAW Facilitators a picture of where you are in the service acquisition process to be better able to assist you. It is also designed to help project teams gather critical information that will support their work throughout this process.

Please complete and email this Step Zero Assessment to: csaw@gsa.gov

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| **Project Name / ID#** *(if applicable)* | **Sponsoring Organization** |
| *Ex. Agency-Wide Acquisition Requirements Delivery (AWARD) / PRJ00567* | *Ex. DHS Procurement Innovation Lab* |
| **Primary POC (Name & Position)** | **Contact Email** | **Date Prepared** |
| *Ex. James Jones; Learning & Network Lead* | *Ex. james.jones@hq.dhs.gov* | *Ex. 10/01/2019* |
| **Follow-on / Recompete / New** | **Estimated Total Life-Cycle Value**  | **Est. Award Date** |
| **☐ Follow-on ☐ Recompete ☐ New** | *Ex. $80,000,000.00 (base + 2 opts)* | *Ex. 04/01/2020* |
| **How did you hear about the CSAW Program** | *Ex. Training* |
| **Category of Spend (if known)** | **Sub-Category of Spend (if known)** |
| *Ex. Professional Services* | *Ex. Management & Advisory Services* |

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| **High-level Description of Requirement & Background (***500 word limit***)** |
| *Ex. This acquisition is to award a recompetition of a contract for… define the nature of the services acquisition that this CSAW will address. NOTE: If this is not a NEW requirement, please include when the existing contract/task order ends.* |

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| **Where are you in the process (***please complete* ***TABLE 1*** *below***) and why have this workshop now?** |
| *Ex. We are just beginning to form a team to begin planning for the recompete, which we would like to expand to include additional offices. We want to have this workshop now so that we have sufficient time to implement the lessons, tools and best practices from the workshop into our process.* |

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| **What key results would you like to achieve (work products) during the workshop?** |
| * *Ex. Better defined and better written requirements (with appropriate performance standards)*
* *Ex. Identify acquisition strategy that would increase competition and be more flexible to our changing needs*
* *Ex. Draft a project team charter*
* *Ex. Identify next steps / milestones for the project team to successfully execute the requirement*
 |

We ask that **ALL** key team members participate in all four days of the SAW, which typically includes at a minimum the Program/Project Manager, the Procuring Contracting Officer, the Contracting Officer's Representative(s), requirements owners, subject matter experts, and may include legal, budget or other functions as applicable to the organization or requirement.

**NOTE**: It is better to identify MORE people up front and have them excuse themselves if they don’t need to be there than attempting to bring in people who aren’t there and should be.

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| **Who are the key team members that will be at the workshop? (\* = must attend)** |
| **Name** | **Role** | **Email** | **Phone** |
| *Ex. Lasondia Jones* | Contracting Officer**\*** | *lasondia.jones@org.gov* | *555-555-5555* |
| *Ex. Wilber DeAngelis* | Project Manager**\*** | *wilber.deangelis@org.gov* | *555-555-5555* |
| *Ex. Sarah Goldfeld* | Contracting Officer’s Rep. (COR)**\*** | *sarah.goldfeld@org.gov* | *555-555-5555* |
| *Ex. Sonny Nawrocki* | Program Office Representative | *sonny.nawrocki@org.gov* | *555-555-5555* |
| *Ex. Adam Jenkins* | *SME* | *adam.jenkins@org.gov* | *555-555-5555* |
| *Ex. Jessi Franklin* | *GSA Project Manager (AAS)* | *jessi.franklin@gsa.gov* | *555-555-5555* |
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Please identify the executive sponsor(s) and/or senior leadership stakeholder(s) for this project that have a direct interest in the outcome of this acquisition and its results. If an actual sponsor has been identified, please note that with “\*” next to their name.

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| **Project Sponsor Name** | **Title** | **Email** | **Phone** |
| *Ex. Lakshmi Chopra* | *Chief Procurement Officer* | *lakshmi.chopra@hq.dhs.gov* | *555-555-5555* |
| *Ex. Karen Gould****\**** | *Office of Procurement - AIA* | *karen.gould@hq.dhs.gov* | *555-555-5555* |

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| **What are the probable issues that will need to be discussed during the workshop?** |
| * *Ex. We are currently in “vendor-lock” and want to increase competition, especially to SB*
* *Ex. Challenges getting desired results using Firm-Fixed Price*
 |

**TABLE 1 - Step 0 Checklist -**

***You do not need to have done the work outlined below prior to the workshop or prior to submitting this form. The following checklist is intended to provide your CSAW facilitators with an understanding of where your team is at and how to effectively customize the workshop to meet your needs.***

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| **YES** | **NO** | **TASK** |
| **☐** | **☐** | **Determined who the “key” participants are for this acquisition team [PM, CO (KO), COR, SMEs, etc.]**Please provide list by name and organization (see page 2 above) |
| **☐** | **☐** | **Developed a Vision Statement and Team Charter for the project** |
| **☐** | **☐** | **Developed a Project Plan covering the 8 steps of a Performance Based Acquisition**<https://buy.gsa.gov/spba> |
| **☐** | **☐** | **Defined/documented problems with current requirement and business processes** |
| **☐** | **☐** | **Reviewed previous contracts to provide history or background** |
| **☐** | **☐** | **Developed presentations/briefings/meeting minutes about this acquisition requirement** |
| **☐** | **☐** | **Conducted Independent Government Cost Estimate (IGCE)** |
| **☐** | **☐** | **Developed an initial list of potential risks facing this acquisition** |
| **☐** | **☐** | **Developed an agreed to list of high level outcomes validated by stakeholders** |
| **☐** | **☐** | **Started conducting market research for this service requirement** |
| **☐** | **☐** | **Started drafting performance requirements statements / standards** |
| **☐** | **☐** | **Started a draft of the PWS or SOO** |
| **☐** | **☐** | **Started a draft Acquisition Strategy** |
| **☐** | **☐** | **Started a draft Quality Assurance Surveillance Plan** |
| **☐** | **☐** | **Identified Evaluation Criteria / Source Selection Approach** |