Overview: IT Schedule 70 Offer Preparation

August 2012
Purpose of this Training

- Provide guidance on how to complete an IT Schedule 70 eOffer
- Clarify the process and expectations for submitting an eOffer
- Provide an open forum for prospective contractors to seek clarification
- Promote better quality eOffers from contractors who are informed about the program and process
OVERVIEW OF IT SCHEDULE 70
Integrated Technology Services

IT Schedule 70 Overview

**IT Schedule 70 Features**
- ID/IQ contracting vehicle to procure IT commercial products & services
- Leverages full buying power of federal government to negotiate ceiling prices, and empowers our customers to obtain deeper discounts
- Est. 85% of all contracts held by Small Businesses. More than 40% of all IT Schedule 70 Sales by Customer Agencies are with Small Business
- Enable agencies to meet socioeconomic goals
- Available to state/local under certain authorities
- Small Business Set-Asides are now available on Federal Supply Schedule

**IT Schedule 70 Offerings**
- Software Licenses
- IT Equipment (Sales or Lease)
- IT Training Courses
- IT Professional Services
- E-Commerce Services
- Wireless Services
- Satellite Services
- Identity and Access Management Products and Services:
  - Digital Certificates
  - HSPD-12 Products and Services
IT Schedule 70 is Green!

- Solicitation Refresh 30 published February 13, 2012

- All offers and mods MUST be submitted electronically through the eOffer/eMod system
  - Reduces paper consumption
  - Files are electronic = always accessible
IT Schedule 70 - Special Item Numbers (SINs)

Software:
132 32 Term Software Licenses
132 33 Perpetual Software Licenses

Hardware:
132 8 Purchase of Equipment
132 9 Purchase of Used/Refurbished Equipment

New SIN: 132 99 - Introduction of New Information Technology Services and/or Products
Integrated Technology Services

IT Schedule 70 Special Items Numbers (SINs) Cont.

Services:

132 3  Leasing
132 4  Short Term Rental
132 12 Maintenance of Equip./Repair
132 34 Maintenance of Software as a Service
132 50 Training Courses
132 51 IT Professional Services
132 52 E-Commerce Services
132 53 Wireless Services
132 54 Commercial Satellite Communications (COMSATCOM) Transponded Capacity
132 55 Commercial Satellite Communications (COMSATCOM) Subscription Services
132 60A Electronic Credentials, Not Identity Proofed
132 60B Electronic Credentials, Identity Proofed
132 60C Digital Certificates, including ACES
132 60D E-authentication Hardware Tokens
132 60E Remote Identity & Access Managed Service Offering
132 60F Identity & Access Management Professional Services
132 61 Public Key Infrastructure (PKI) Shared Service Provider (SSP) Prog.
132 62 HSPD-12 Product and Service Components
132 100 Ancillary Supplies and/or Services
GETTING STARTED
How to Obtain the Solicitation

- FedBizOpps (FBO):
  www.fbo.gov

- Other Sources:
  http://www.gsaelibrary.gsa.gov
  http://www.eoffer.gsa.gov

Search by Solicitation Number:
FCIS-JB-980001-B
Digital Certificate

- Cost: approximately $120 for two (2) years
- Four-step process, which may take 7-14 days
- Must Update every two (2) years
- Legal identity
  - Protect
  - Report if lost or stolen
  - Do not leave behind
    - Change Computers
    - Leave Company
Registrations

- **SAM – System for Award Management**
  One system to manage entity information in one record
  - Central Contractor Registration (CCR)
  - Online Representations & Certification Application (ORCA)
  - Website: [www.sam.gov](http://www.sam.gov)

- **Dun & Bradstreet (D&B)/Open Ratings Performance Evaluation**
  - Website: [www.ppereports.com](http://www.ppereports.com)
Vendor Support Center

Website: http://vsc.gsa.gov

One-stop resource to help GSA's commercial partners succeed in the federal government marketplace

- Pathways to Success Training
- Vendor Toolbox – Readiness Assessment
- Schedules Overview
PREPARING an eOFFER
Preparing the IT Schedule 70 eOffer – Required Information

- Evaluation Factors
- SF1449
- Vendor Response Document
- Commercial Pricelist
- Production Point
- Commercial Sales Practices Format (CSP-1)
- Labor Category Matrix (services only)
- Proposed Economic Price Adjustment (EPA) Mechanism
- Proposed Price List (Offered Pricing)
- Open Ratings Past Performance Evaluation
Evaluation Factors

All offers must address the following evaluation factors:

**Factor 1:** Financial Responsibility Determination
**Factor 2:** Corporate Experience
**Factor 3:** Past Performance
**Factor 4:** Project Experience for SINs 132 51 and 132 60f
**Factor 5:** Project Experience for SINs 132 54 and 132 55
**Factor 6:** Information Assurance Minimum Security Controls Compliance for SIN 132 54, Commercial Satellite Communications (COMSATCOM) Transponded Capacity, and SIN 132 55, Subscription Services

**Factor 7:** Price
SF1449 & Vendor Response Document

SF1449
- Complete Blocks 12, 17, 23, 24
- Sign and date the form

Vendor Response Document
- Complete all Clauses
- Provides a Supporting Documentation Checklist
Commercial Pricelist

- Submitted by Offerors who utilize a commercial pricelist as part of their business practices/policies

Production Point

- Location where “End Product” was manufactured
  - Establishes Trade Agreement Act Compliance
    - FAR Subpart 25
- Not applicable to Services
Commercial Sales Practices Format (CSP-1)

- Prepared for each SIN offered
- Must provide:
  - Sales to the general public – 12-month period
  - Projected Sales under this contract
  - Discounting Policies or Standard CSP
    - Matrix of Customers and Discounts
    - Narrative description
# Labor Category Matrix Template

**INFORMATION TECHNOLOGY SERVICES (SAMPLE ONLY)**

<table>
<thead>
<tr>
<th>Commercial Labor Category</th>
<th>Minimum/General Experience and Years of Experience</th>
<th>Functional Responsibility</th>
<th>Educational Requirements</th>
<th>DOD Contract #</th>
<th>USAF Contract #</th>
<th>Boeing Contract #</th>
<th>Commercial Rate **</th>
<th>Proposed GSA Schedule Rate without IFF</th>
</tr>
</thead>
<tbody>
<tr>
<td>Program Manager</td>
<td>10 Years Experience Or state &quot;Same as GSA pricelist&quot; if in fact it is the same.</td>
<td>State what the individual’s function was/is (not duties) on the contract(s) shown or state &quot;Same as GSA pricelist&quot; if in fact it is the same.</td>
<td>Bachelor’s Degree in Computer Science, Engineering, or Information Technology Or state &quot;Same as GSA pricelist&quot; if in fact it is the same.</td>
<td>D12345 Sub or Prime T&amp;M or FFP? Period of Contract:</td>
<td>E12345 Sub or Prime T&amp;M or FFP? Period of Contract:</td>
<td>F2345 Sub or Prime T&amp;M or FFP? Period of Contract:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>System Engineer</td>
<td>5 Years Experience Or state &quot;Same as GSA pricelist&quot; if in fact it is the same.</td>
<td>State what the individual’s function was/is (not duties) on the contract(s) shown or state &quot;Same as GSA pricelist&quot; if in fact it is the same.</td>
<td></td>
<td></td>
<td></td>
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<td></td>
</tr>
</tbody>
</table>

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1. Provide as many of your best (lowest priced) contracts as necessary, for comparison with labor rates being offered to the government. Rates offered to the government should not be higher than your BEST (LOWEST) RATES under any contract shown. Also, if any of your government contracts carry a security clearance, GSA should be offered that same security clearance. **USE AS MANY COLUMNS AS YOU NEED TO SHOW YOUR BEST CONTRACTS.**

2. **Blending of rates is not allowed.** Provide the lowest hourly rates at which any labor category has been sold. Insert the name and contract number of the government/commercial contract. Please note whether you are a subcontractor or prime. If you are a subcontractor, make sure you show your subcontractor rates, not the prime rates.

    - Make sure you state what the degree is in (computer science, engineering, liberal arts and whether it is a Bachelors or Associates. In addition, if there are any labor categories that the minimum educational level is a certificate in a specific area, please state the area of certification.

    - Insert your commercial rate and provide a copy of your commercial catalog or pricelist. An effective date should be printed on the catalog or pricelist. If you don’t have or publish a printed commercial pricelist, make a statement to that affect and provide the page(s) from the contracts (commercial or government) established above that reflect each labor category and the agreed to rate(s).
Economic Price Adjustment (EPA) Mechanism (3 Types)

1. For Contracts Based on a Commercial Pricelist

2. For Contracts Not Based on a Commercial Pricelist: Escalation Rates

3. For Contracts Not Based on a Commercial Pricelist: Market Indicator

GSAR 552.216-70 and I-FSS-969 Economic Price Adjustment Clauses
Clause I-FSS-600 provides the format for the pricelist, to include the following:

- Identify SINs
- Geographic Scope of Contract
- Payment and Delivery
- Terms and Conditions
- Pricing
Open Ratings Past Performance Evaluation

- To assist the Government in assessing an Offeror’s past performance this evaluation must be completed and submitted with the offer.

- The cost of the report is paid by the Offeror.
Additional information may be required depending on the size of your company and/or the SINs offered by your company

<table>
<thead>
<tr>
<th>Attachment</th>
<th>Who Must Submit</th>
</tr>
</thead>
<tbody>
<tr>
<td>Subcontracting Plan</td>
<td>Large Businesses with exceeding $650K</td>
</tr>
<tr>
<td>Letters of Supply</td>
<td>Resellers</td>
</tr>
<tr>
<td>Dealer/Reseller Spreadsheet</td>
<td>Resellers</td>
</tr>
<tr>
<td>Project Experience</td>
<td>Professional Service Providers</td>
</tr>
<tr>
<td>Labor Category Descriptions</td>
<td>Professional Service Providers</td>
</tr>
<tr>
<td>Training Course Descriptions</td>
<td>Professional Service Providers – Classroom Training</td>
</tr>
<tr>
<td>Compensation Plan for Professional Employees</td>
<td>Professional Service Providers with expected sales</td>
</tr>
<tr>
<td>Authorized Dealer(s) Information</td>
<td>Resellers</td>
</tr>
<tr>
<td>Solicitation Exceptions/Waivers/Deviations</td>
<td>Any Offeror Taking Exception with any of the Applicable Terms and Conditions, FAR Clauses, or GSAR Clauses</td>
</tr>
</tbody>
</table>
Small Business Subcontracting Plan

- Applicable for large business exceeding $650K

- Outlines Offeror’s:
  - Small business subcontracting goals
  - Reporting requirements
  - Recordkeeping requirements
Letter of Supply

- Required by all Offerors who are dealers/resellers offering a manufacturer’s products

- Must comply with the following:
  - Submitted on the manufacturer’s letterhead
  - Demonstrate continuous source of supply
  - Signed by corporate official of the manufacturer
Dealer/Reseller Spreadsheet Template

- Required by all Offerors who are dealers/resellers offering a manufacturer’s products

- Provide accurate and complete pricing information on the manufacturer, dealer/reseller and GSA proposal
Project Experience

- Narratives required by all Offerors Providing IT Professional Services (132-51 & 132-60F)
- Demonstrate capability to perform SINs offered by providing the following information:
  - Project/Contract Name
  - Project Description
  - Dollar Amount of Contract
  - Project Duration
  - Point of Contact and Telephone Number
Labor Category Descriptions

- Required by all Offerors providing IT Professional Services (132-51 & 132-60F)

- Labor Category Descriptions
  - Title of labor category
  - Functional responsibility performed
  - Qualifications
  - Education required
Training Course Descriptions for SIN 132-50

- Required by all Offerors providing IT specific Classroom Training as a Service
- A formal catalog or a written description of class offerings
- Length of course
- Location (Contractor or Customer site)
Compensation Plan for Professional Employees

- Required by all Offerors Providing IT Professional Services per FAR 52.222-46 (132-51 & 132-60F)

- It sets forth salaries and fringe benefits proposed for the professional employees who will work under the contract

- May submit general compensation practices from Offeror’s Employee Handbook
Authorized Dealer(s) Information

- Required by Offerors who plan to allow Authorized Dealer to sell on their behalf

- A list of authorized dealers must be submitted

- Upon contract award, authorized dealers must follow the terms and conditions of the Contractor’s GSA Schedule 70 Contract

- Authorized dealer(s) information must be kept Up-to-Date
Exceptions/Waivers/Deviations

- Offeror may take exception to the terms and conditions within the solicitation.

- Provide written documentation of the rationale behind Offeror’s exception.

- Once award is made and FSS approved pricelist is uploaded to GSA Advantage, a Gold Star indicator will appear next to the contractor’s name in GSA eLibrary if no exceptions were taken.
USEFUL REMINDERS
Useful Reminders

- Read the entire solicitation prior to preparation of an offer
- Ensure the information provided is clear, concise, and complete
- Utilize the templates and checklists provided in the solicitation
- Utilize the resources available on the Vendor Support Center website
- Electronic submission of offers through eOffer is mandatory
Need Assistance?

eOffer/eMod Helpdesk
Phone: 866-472-9114
Email: eoffer@gsa.gov

IT Schedule 70 Helpline
Phone: 877-446-4870
Questions?