FAST23 Virtual Conference: Building a Future-Ready Government

May 17, 2023

FAST 2023

Keynote: FAS Commissioner, Sonny Hashmi

Jonathan Evans
CSAW Program Manager &
Senior Facilitator

Performance Based Acquisition

What is PBA?

"Performance-based Acquisition" (PBA) means an acquisition structured around the results to be achieved as opposed to the manner by which the work is to be performed. - FAR 2.101

❑ **Performance Based Acquisition** *is the preferred method for acquiring services*

❑ *Agencies **must use PBA methods** to the maximum extent practicable*

FAR 37.102(a)(1)

STEPS TO PERFORMANCE BASED ACQUISITION

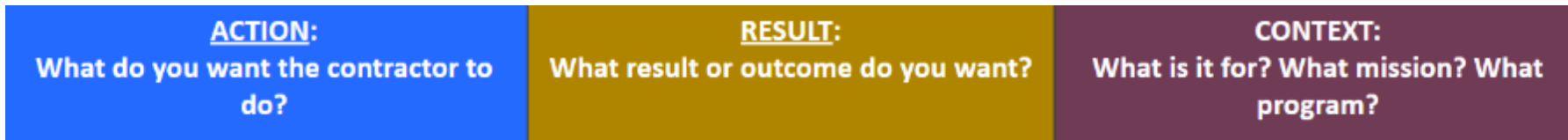| STEP 1	STEP 2	STEP 3	STEP 4	STEP 5	STEP 6	STEP 7	STEP 8
Form the Team	Identify Objectives	Market Research	Define Requirements	Define Measures	Source Selection	Manage Performance	Complete Closeout
PURPOSE:	**PURPOSE:**	**PURPOSE:**	**PURPOSE:**	**PURPOSE:**	**PURPOSE:**	**PURPOSE:**	**PURPOSE:**
Establish the team and conduct high-level project planning.	*Identify why we're doing this in the first place and what are the high-level objectives (HLO).*	*Take a team approach to market research using available tools and innovative resources.*	*Develop well-written requirements statements and identify the appropriate work statement type.*	*Define what constitutes successful performance and how the team will measure this?*	*Review options for evaluation criteria and think through the source selection process.*	*Manage the contract to ensure performance objectives are met.*	*Plan for closing out the contract and concluding the project.*

Writing Better Requirements

Use the ARC Method

ACTION: What do you want the contractor to do?	RESULT: What result or outcome do you want?	CONTEXT: What is it for? What mission? What program?

ORIGINAL:

The Contractor shall train system end-users on how to use the system

Each requirement statement begins with "*The Contractor shall*" (or must)	Action verb	Result? *Is this the result we want?*	Context

REVISION (focus on the desired result or outcome):

- *The contractor shall provide [A] **training** [R] to end-users on how to use the system*
- *The contractor shall deliver [A] **a user manual** [R] for all aspects of the system*

NOTE: Everything after a preposition is context... some prepositions: *to, for, by, with, around, on, under, 'so' ("so" is a preposition when it would otherwise be combined with "that"), after, through, of, at, in, between...*

ACTION - RESULT - CONTEXT

ORIGINAL STATEMENT:

The contractor shall provide data gathering, processing, management, and/or analysis of internal or external data sources to support program initiatives and projects. The contractor may be asked to work with a range of data inputs, including but not limited to ... Data sources may include, but will not be limited to commercial vendors, local, state, and federal government agencies, academic researchers, and other related studies.

NEW STATEMENTS:

- The Contractor shall create [A] data collection methodologies [R] for internal or external data used in support of … [C]
- The Contractor shall prepare, process and manage [A] internal and/or external data [R] using approved data collection and management methods to support analysis and modeling efforts. [C]

Civilian Services Acquisition Workshops (CSAW)

What is a Civilian SAW?

A Civilian Services Acquisition Workshop (CSAW) is a facilitated workshop built around a specific acquisition and its multi-functional integrated project team (IPT). The workshop facilitates the team through the performance-based acquisition (PBA) process from beginning to end.

CSAW
CIVILIAN SERVICES ACQUISITION WORKSHOPS

Workshop Purpose & Objectives

PURPOSE

Develop the mission, measurable objectives, requirements and performance-based strategies for the {Agency Requirement} and a roadmap to complete it.

OBJECTIVES

- **Understand and Apply** the Performance-Based Acquisition (PBA) process and the Steps to PBA

- **Explore** the tools, resources, techniques, innovations and best practices to successfully execute this requirement

- **Collaborate** as a team through facilitated activities to develop draft documentation for this requirements

- **Develop** a high-level roadmap for successful implementation of this performance-based acquisition

- **Gain** consensus on critical decisions and the path ahead

Questions?

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For more information, visit:
gsa.gov/csaw

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Hi-Def Acquisition Data

Matt Tibbitts

Office of Federal Procurement Policy
OMB

What is Hi-Def and Why do we need it?

Problem:
- Acquisition-related data reside in disparate systems across public and commercial domains which need to be interoperable to support on-demand access.
- For example, some information is kept in IAE, while other data are included in agency contract writing systems, in payment platforms, or other internal and external databases.

Opportunity:
- Hi-Def is a coordinated approach to accessing, using, and managing acquisition data and innovative tools for the workforce.
- The goal of the Hi-Def initiative is to enhance the efficiency of the entire acquisition process by providing users with the right data and information at the point of need without duplicating data, tools, or effort.

Hi-Def Supports the Administration's Priorities

President's Management Agenda

Priority 3: Managing the Business of Government

- Goal 1: Create a diverse and resilient federal marketplace
- Goal 2: Ensure interoperability and sharing of acquisition data and tools

Executive Order 13985 *Advancing Racial Equity and Support for Underserved Communities through The Federal Government*

OMB Memo M-22-03 *Advancing Equity in Federal Procurement*

OMB Memo M-23-11 *Creating a More Diverse and Resilient Federal Marketplace through Increased Participation of New and Recent Entrants*
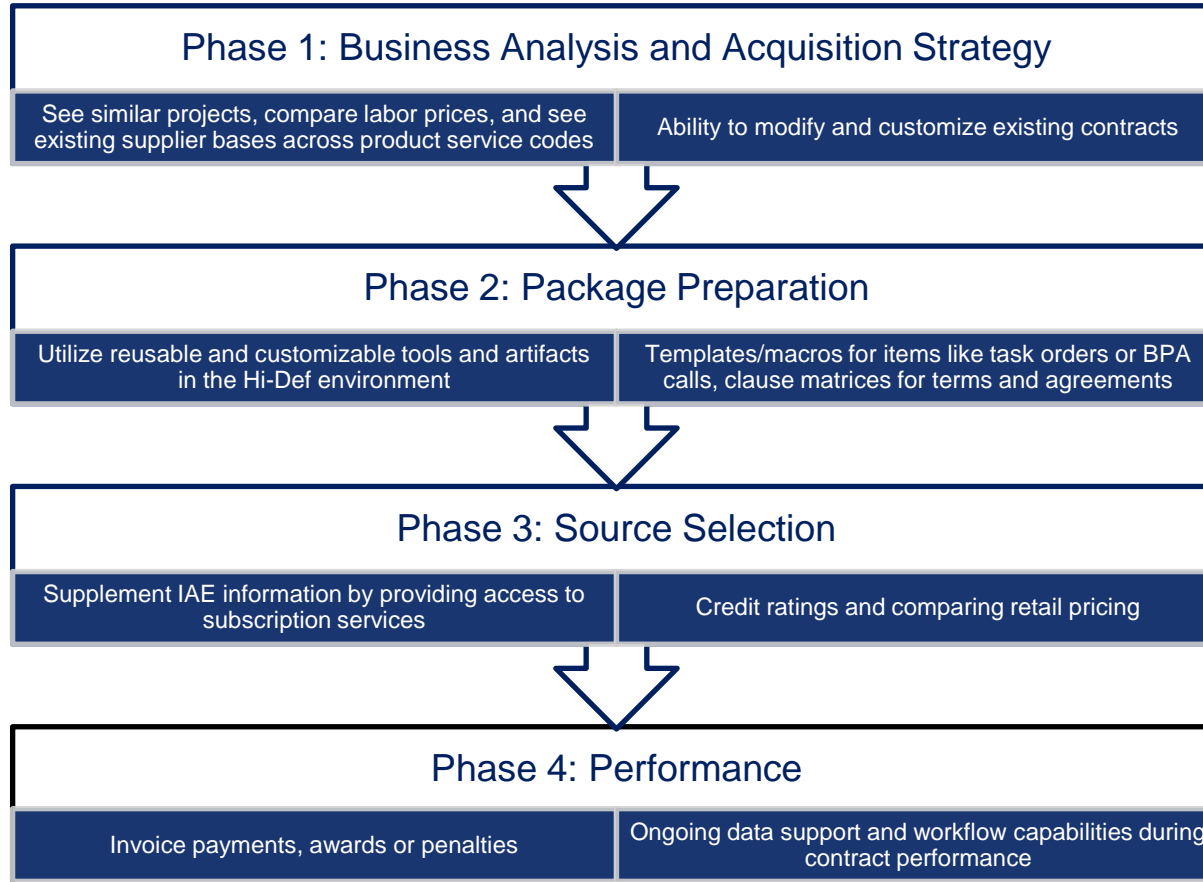
Hi-Def Vision

Vision: A modern acquisition information environment that

- Supports the lifecycle of the acquisition process from the development of needs and solution strategies to negotiation, award, and performance management;
- Provides you with immediate access to reliable and relevant data (public and commercial sources), business intelligence, sourcing solutions, productivity tools and technologies, best practices; and
- Is built to take maximum and timely advantage of changes to and innovation in business practices and technologies.

Objective: make real-time acquisition data and information available from where it resides to those who need it.

Potential Hi-Def Uses

Phase 1: Business Analysis and Acquisition Strategy

See similar projects, compare labor prices, and see existing supplier bases across product service codes	Ability to modify and customize existing contracts

Phase 2: Package Preparation

Utilize reusable and customizable tools and artifacts in the Hi-Def environment	Templates/macros for items like task orders or BPA calls, clause matrices for terms and agreements

Phase 3: Source Selection

Supplement IAE information by providing access to subscription services	Credit ratings and comparing retail pricing

Phase 4: Performance

Invoice payments, awards or penalties	Ongoing data support and workflow capabilities during contract performance

FY23 Deliverables

E-Invoice/CLIN Market Research and Pricing Data MVP

Equity Tool phase 2 targeted for CO/COR audience

Hi-Def Environment: Technology Landscape Assessment and User Interface

Tools for Growing Supplier Base Diversity & Resilience

A **supplier base dashboard** helps managers track, *in whole or within specific supply chains*

- the total number of entities that have done business with the agency during prior fiscal year;
- the breakdown of entities that are new entrants, recent entrants, or established vendors;
- the breakdown of entities by size and socioeconomic status.

A **procurement equity tool** helps contracting personnel identify from SAM & FPDS information on socio-economic (SDBs, WOSBS, SDVOSBs, HUBZone) and other small business contractors who -

- sell in sectors and/or geographic areas where the agency seeks increased representation in its contracting base; and
- have never received a contract award and might be interested in participating in an agency competition.

Both tools have been developed with significant support from GSA and active interagency feedback. Each tool has a *user guide* and *workshops* will be conducted so agencies can learn and share ideas on helpful applications of the tools.

Key Overall V2 Enhancements

Gov-Wide Procurement Equity Tool

Dashboard Navigation
Select your area of interest to navigate across pages

Explore Vendor Registration Data
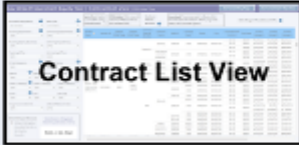
Vendor Map View

Vendor List View

Explore Awarded Contract Data

Contract Map View

Contract List View

Additional Resources

User Guide
How-to guide on getting started and navigating the tool

Data Source Details
Further info on data sources and the universe of data for the tool

Policy Guidance
Link to relevant Federal policy that supports equity in procurement

Share Feedback
We want to hear from you! Share your thoughts on this tool

Overview
The Gov-Wide Procurement Equity Tool leverages data from HPDS (Federal Procurement Data System) and SAM (System for Award Management) to assist Federal Agencies with market research with a focus on small disadvantaged businesses. This tool was built to support acquisition professionals in alignment with the Executive Order on Advancing Racial Equity and Support for Underserved Communities. This is not intended to replace capabilities in FPDS and SAM but rather to bring together specific data to support common questions related to equity in procurement.

Version 2 of the Tool has **enhanced functionality and features**, including:

● **Landing Page:** to easily navigate across the main pages and resources

● **List View:** non-geographic representations of the data, with the same key search/ filter functionality on the map view pages

● **Tooltips:** Helpful info icons with additional explanations and guidance on the map and list view pages

● **Feedback Loop:** we want to continue to hear from users! You can access the feedback form from V2 of the Tool

Procurement Equity Tool Use Cases

The development team has identified a selection of primary use cases which serve as examples of the Gov-Wide Procurement Equity Tool's utility to users

Use Case	Goal		Example
Identify Potential Vendors	Identify SESB vendor options *based on geographic location*	▶	Identify all WOSB vendors in Texas which can service procurements under NAICS code 236220
Refine Shortlist with Historical Data	*Assess each vendor* by capabilities, specializations, and historical usage	▶	Determine which Texas-based SDVOSB vendors servicing NAICS 236220 have history with Agency X through Vehicle Y
Assess Geographical Distribution	Identify the *impact of business characteristics* (i.e., SESB designation) on vendor density	▶	Assess the geographic impact on vendor availability when restricting by fields such as NAICS or various vendor designations
Downloading Data for External Use	*Export data for external analyses* by downloading data directly from the tool	▶	Define a scope of interest (i.e., California-based Women-Owned vendors for NAICS 493110) and export relevant data for external use

Procurement Equity Tool Use Cases (cont.)

Accomplishments to Date

- Successfully piloted data ingest and business intelligence tools for wage and labor data from disparate sources, portions being implemented and scaled by GSA.

- Piloted bots to support fraud deterrence, implementation in GSA.

- Identified lead agency for hi-def implementation partnership (GSA) with OMB lead Matt Tibbitts.

- Completed Equity Tool Phase 1 for OSDBU audience.

- Held Hi-Def and Equity Tool briefings, roadshows, demos

- Held 10+ Technology Landscape Assessment deep-dive interviews

- Working on Acquisition Data Management policy to support Hi-Def

Questions?

Matt Tibbitts

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For more information, visit:
gsa.gov/FAST

Break

GSA

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Procurement Innovations for Buying IT & Cyber

Department of Homeland Security (DHS), Procurement Innovation Lab (PIL)

FAST 2023

Sandra Oliver Schmidt
Deputy Director

Scott Simpson
Digital Transformation Lead

**Davis Hayman**
APCP Detailee

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What is the PIL?

A virtual lab where the DHS acquisition community can have a safe space to test new ideas, share lessons learned, and **foster cultural change** to promote innovation and managed risk-taking through a continuous feedback cycle.

PIL Mission:
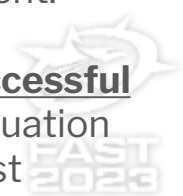To foster a culture of procurement excellence where smart risk-taking and innovation assure DHS mission success.
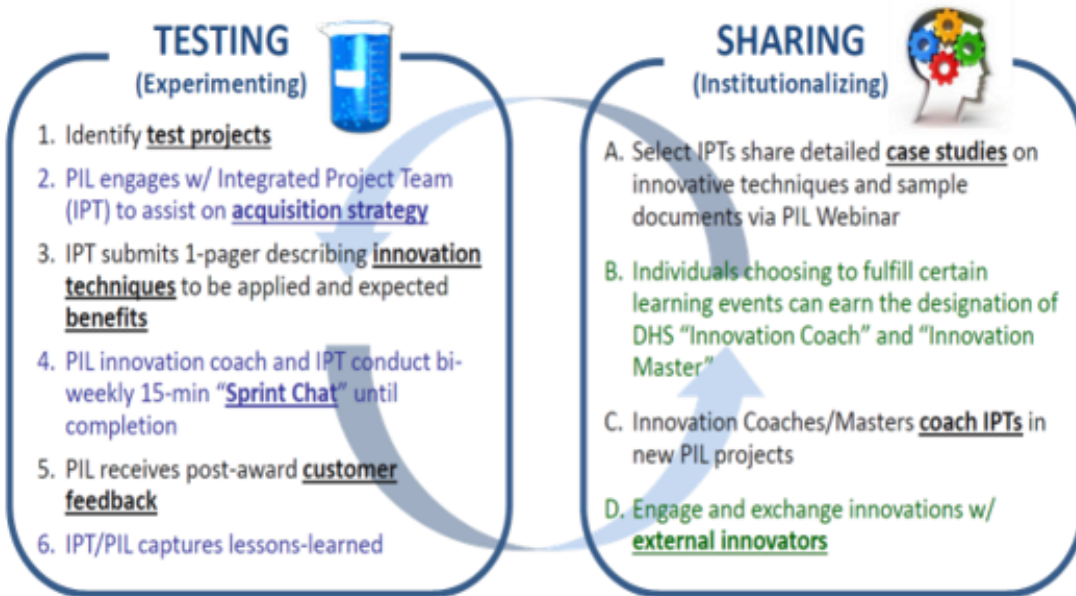
Lower entry barriers for non-traditional and innovative contractors,

Shorten the time-to-award, thereby delivering capabilities to customers faster.

Encourage competition by providing interested vendors with a better understanding of the goals and objectives for each procurement.

Increase the likelihood of successful outcomes by focusing on evaluation techniques to identify the most qualified contractors.

TESTING
(Experimenting)

1. Identify **test projects**
2. PIL engages w/ Integrated Project Team (IPT) to assist on **acquisition strategy**
3. IPT submits 1-pager describing **innovation techniques** to be applied and expected **benefits**
4. PIL innovation coach and IPT conduct bi-weekly 15-min "**Sprint Chat**" until completion
5. PIL receives post-award **customer feedback**
6. IPT/PIL captures lessons-learned

SHARING
(Institutionalizing)

A. Select IPTs share detailed **case studies** on innovative techniques and sample documents via PIL Webinar
B. Individuals choosing to fulfill certain learning events can earn the designation of DHS "Innovation Coach" and "Innovation Master"
C. Innovation Coaches/Masters **coach IPTs** in new PIL projects
D. Engage and exchange innovations w/ **external innovators**

Innovations to be Discussed:

- Market Research Innovations
- Interview Style Questions
- Optional Evaluation Factors
- Technical Demonstrations
- Confidence Ratings
- On-the-Spot Consensus

Project #1: Enterprise Financial Management Systems (EFiMS)

What are we Buying?

"…provide the Department of Homeland Security and its components with **commercial-off-the-shelf** (COTS) **software** licenses (perpetual licenses/annual maintenance, subscription licenses), **software-as-a-service (SaaS),** software documentation and **accessory products** (only if incorporated into the proposed software), and tier 4 **consultative services**."

Stay In Your Lane – FAR Parts

- Establish a DHS-wide Indefinite Delivery Indefinite Quantity (IDIQ) contract.
    - **FAR subpart 15.3, Source Selection**

- Commercial-Off-the-Shelf, Software-as-a-Service (SaaS).
    - **FAR Part 12, Commercial**

Innovations for Market Research

- Release multiple draft RFPs.

- Release Draft Price Structure, SOW, and Evaluation Strategy.

- One-on-One Market Research Conversations with vendors.

- Affordability statement.

Obtain early vendor feedback, communicate desired objectives, and maintain communication throughout your procurement!

Innovation: Interview-Style Questions

- More meaningful evaluation criteria.
- Use your mission to provide context.
- Ask targeted questions about the offeror's related experience.
- Can be configured for any technical factor.

EFiMS RFP Number: 70RTAC20R00000001

#	Question
1	How has your software product been used by other federal agencies to provide integrated financial, procurement, and asset management functionality that minimizes the need for customizations and manual workarounds?
2	How has your software product been used by other federal agencies to support financial reporting?
3	How has your software product been used by other federal agencies to detect and resolve issues regarding internal controls and security while being adaptable to address future risks?
4	How has your software product been used by other federal agencies to address emerging requirements, including new federal mandates?

Innovation: Optional Evaluation Factor

EFiMS RFP Number: 70RTAC20R00000001

●The Government **may** conduct a site-visit to see a demonstration of the offeror's product. The product must be the same version and product proposed under the solicitation. This demonstration may occur at another federal agency, at the offeror's location or a DHS site. DHS will coordinate directly with other federal agencies on any site visits.

●Each demonstration shall last no longer than 3 hours. It is the Government's discretion if the demonstration is complete prior to the 3-hour limit. Upon conclusion of the demonstration, the Government and Offeror personnel may have an additional hour (60 minutes) to ask and answer any remaining questions as an interactive dialogue.

●**If the Government decides to utilize factor 5**, then all offerors will be invited to participate under this factor. However, if a competitive range is established, only those offerors included within the competitive range will be invited to participate under this factor.

Protests

[Protestor] claims that the requirement that offerors demonstrate prior or current implementation experience of their software at a federal agency supporting at least 6,500 users unduly restricts competition in violation of the Competition in Contracting Act …

EFIMS Protests
- ### COFC Pre-Award
  No. 19-1805C

  October 2020
- ### COFC Post Award
  No. 21-1910

  March 2022

[Protestor] argues that DHS applied unstated evaluation criteria, misunderstood the factual underpinnings of [its] proposal, and unequally applied the criteria to the offerors.

Procurement Outcomes - EFiMS

- A $3 Billion IDIQ was awarded to 3 out of the 7 vendors who responded to the RFP.
- DHS-wide Strategic Sourcing Vehicle (SSV) for use by all DHS components.

Project #2: U.S. Coast Guard (USCG) AUXDATA System

What are we buying?

- ○ FY2019 BPA for Workforce Management Solutions.
- ○ SaaS solution to allow USCG Auxiliarists to receive assignments and submit reimbursements.

Stay In Your Lane – FAR Parts

- Establish a single-award BPA.
  - **FAR subpart 8.4, Federal Supply Schedules**

USCG Auxiliarists

Volunteer force supporting USCG since 1939.
Promote Recreational Boating Safety.
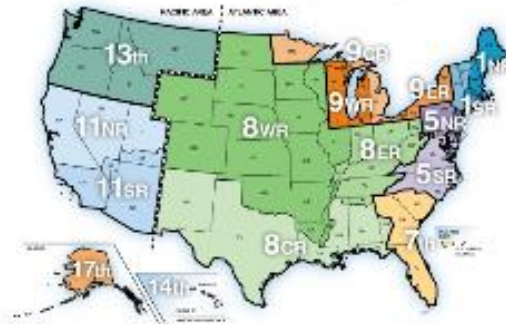**Augment USCG** to enhance safety, security of ports, waterways, coastal regions.
All 50 States, Puerto Rico, Virgin Island, American Samoa, and Guam.
20,000+ members.
Travel expenses reimbursed.

U.S. COAST GUARD AUXILIARY AREAS, DISTRICTS, AND REGIONS

AUXDATA System Procurement

OLD
AUXDATA

IT Modernization BPA from 1990s server to cloud-based Software-as-a-Service for all Workforce Management Systems.

NEW

FAR subpart 8.4

Single-Award BPA

Focus AUXDATA Order

- ❑ **Home-baked**
- ❑ **Unreliable**
- ❑ **Costly to Configure**
- ❑ **Not user-friendly**
- ❑ **POOR Value!!**

- ✓ **Vendor-managed**
- ✓ **Reliable**
- ✓ **Easy to Configure**
- ✓ **User-friendly**
- ✓ **GOOD Value!!**

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Innovation: Technical Demonstrations

"Show Me, Don't Tell Me"

- Allow vendors to demonstrate their product by having evaluators actually see and test the product.

AUXDATA RFQ Number: 70Z0G319QPBZ02900

"Each demonstration shall last no longer than 3 hours. It is the Government's discretion if the demonstration is complete prior to the 3-hour limit. Upon conclusion of the demonstration, the Government and Offeror personnel may have an additional hour (60 minutes) to ask and answer any remaining questions as an interactive dialogue."

AUXDATA Technical Demonstration

Innovation - Confidence Ratings

Confidence Ratings
- Substitute the traditional adjectival ratings with confidence ratings to make your evaluation more than a counting exercise and to provide technical evaluators more flexibility.

High Confidence: The Government has high confidence that the Offeror can satisfy the requirement *with little or no Government intervention.*

Some Confidence: The Government has some confidence that the Offeror can satisfy the requirement *with some Government intervention.*

Low Confidence: The Government has low confidence that the Offeror can satisfy the requirement *even with Government intervention.*

Innovation: On-the-Spot Consensus

- Don't wait days or weeks to document your evaluation of an offeror. Do it right away—"On-the-Spot"!

- Skip the Individual Reports! The FAR does not require them.

- Immediately choose a Confidence Rating, together. Then document!

- Information is fresh, time is saved.

Procurement Outcomes - AUXDATA

- A $16 Million BPA.
- PALT 4 months.
- Three-phased Advisory Down-Select from 17 vendors to make 1 award.

Best Practices Learned From AUXDATA

Prior to Solicitation Release:

- Contracting Officer Leads Technical Evaluation Team (TET) training.
- Create On-the-Spot Consensus technical evaluation template with evaluators.
    - TET typically decides to use more meaningful technical factors to streamline proposal evaluation and legal reviews.
    - Attorney advisor attends and team is able to address concerns early!
- Formulate focused scenario-based questions.
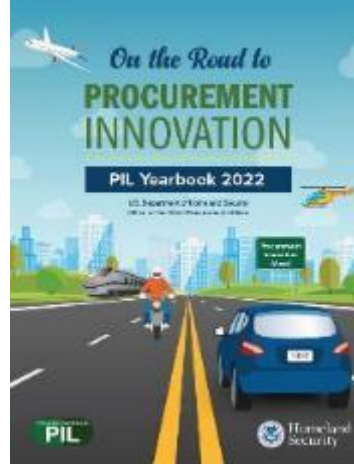- Keep end-users involved for all agile requirements!

For more information, visit:
gsa.gov/FAST

Questions?

- Please feel free to contact us at PIL@hq.dhs.gov with any comments, questions or coaching assistance!
- https://www.dhs.gov/pil

Christina Shaw

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FAST
2023

PPM by the Numbers

32,000

Active Users

- 12,000 GSAXcess
- 20,000 Auctions

$9.5 B

Property reported in FY22

- $743 M Transferred
- $420 M Donated
- $26 M CFL Transfers
- $3 M Foreign Gifts
- 5,244 Firearms

$218 M

Sales proceeds in FY22

- $165 M returned to agencies
- 25,994 contracts and payments

System Modernization

The Personal Property Management System (PPMS) is GSA's PPM's new system for personal property disposal.

It combines seven legacy systems, including:
- AAMS (Agency Internal Property Screening)
- GSAXcess
- MySales
- SASy (GSA's backend sales program)
- Foreign Gifts module
- Firearms module
- The GSA-hosted Computers for Learning website

PPMS Launch Schedule

April	May	June	Summer 2023
User Acceptance Testing GSA Internal Training starts	NUO training starts	All Federal Training Starts	System Launch (exact date TBD)

Register for training at www.gsa.gov/events

Excess as the First Source of Supply

Who?
- **ALL** executive agencies
- Judiciary & Congress encouraged

What?
- **FIRST** source of supply for new procurements

When?
- When **practicable -** e.g.:
  - Cost of excess does not exceed the cost of new
  - Parts and repair services are readily accessible.

Where?
- GSAXcess.gov
- PPMS.gov (starting summer 2023)

Why?
- Maximize the use of existing federal property
- Minimize new procurements
- Extend the useful life of government assets

What is Exchange / Sale

Exchange/Sale can **reduce your Agency's cost of replacing personal property** by **exchanging or selling replacement property** and **applying the exchange allowance or proceeds** of sale in whole or in part payment for the acquisition of similar property.

For more information, visit:
gsa.gov/FAST

Questions?

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OASIS+ What is it?

- Federal Acquisition Service (FAS)'s next generation best-in-class (BIC) multiple award indefinite-delivery indefinite-quantity (IDIQ), multi-agency contract (MAC) program for integrated and/or complex non-IT services

- Enables federal customers to acquire a broad range of innovative service solutions from highly qualified companies of all sizes

- Subsumes existing FAS's OASIS, HCaTS (Human Capital and Training Solutions), and Building and Maintenance Operations (BMO) contract programs once they expire

OASIS+ Unique Features

Broad Flexible/Expandable Domain-Based Structure

Industrial Base of Highly Qualified Contractors

Global Access to Commerical & NonCommercial Services

No Cap on Number of Awards and No Contract Ceiling

Open On-Ramping After Initial Awards

No Evaluation of Price at the Contract Level

10-Year Ordering Period (5 Year Base+ 5 Year Option+5 Years to Complete Work)

Technology Based Ordering & Market Research Tools

OASIS+ Contract Program Families

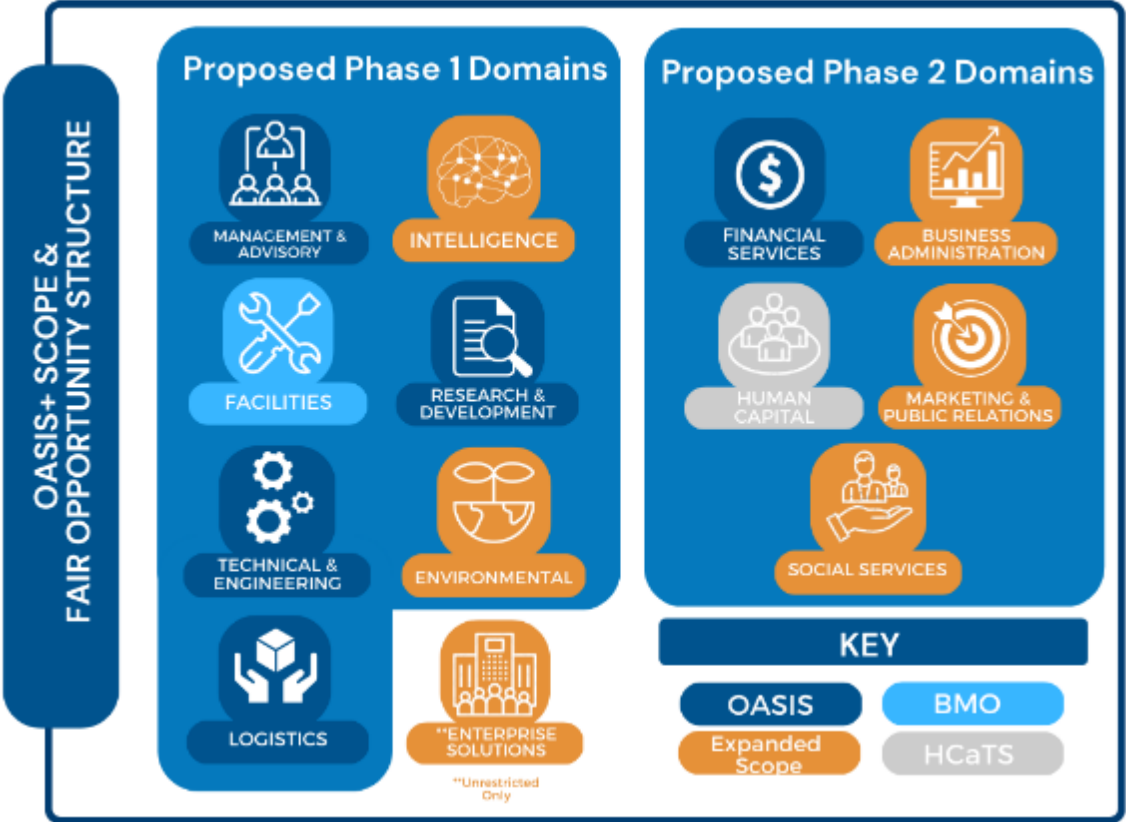|		
SBA-Certified 8(a) Firms	SBA-Certified HUBZone Firms	SBA-Certified Women-Owned Small Businesses
SBA-Certified Service Disabled Veteran-Owned Small Businesses	Total Small Businesses	Unrestricted

OASIS+ Scope & Fair Opportunity Structure

OASIS+ Program Development

Market Research

Issue Draft RFP 1 (Q1)

Issue Draft RFP 2 (Q2)

Awards Begin to be Announced

OASIS UR Ordering Period Ends (Q4)

FY21

FY22

FY23

FY24

FY25

Acquisition Planning

Draft RFP Phase

Issue Final RFP (Q3)

Final Awards Made & NTPs Issued

OASIS SB & 8(a) Ordering Period Ends (Q1)

67
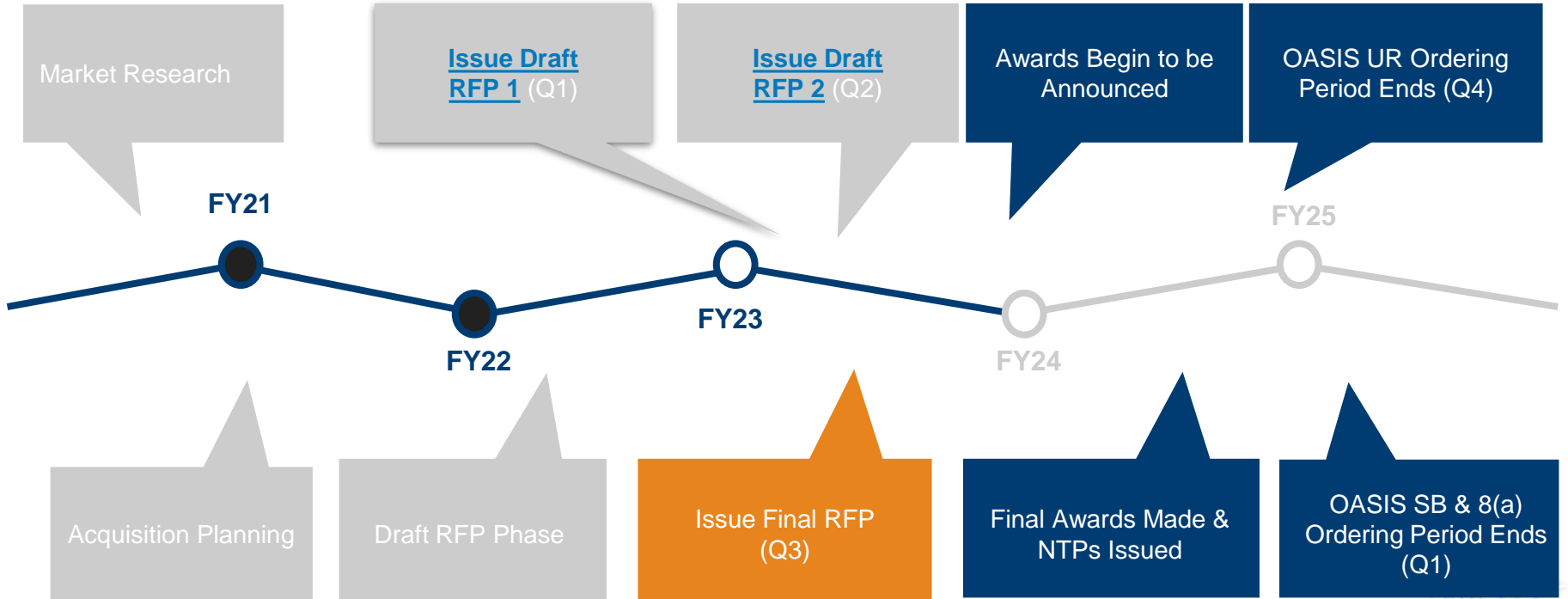
OASIS+ Engagement

- **Interactive engagements since January 2021**
  - SBA and OSDBU communities
  - 75+ agency customer engagements
  - 25+ industry focus groups and engagement sessions including industry associations
- **Requests for Information (RFIs)**
- **Program updates posted to Interact and SAM.gov**
- **Industry and Acquisition Workforce (AWF) surveys**

OASIS+ Contract Administration

- **Re-representation at option period**

- **Dormant Status**

- **Adding new Domains**

- **Required use of electronic contract and task order management systems**

- **Contractor Self Assessment, similar to OASIS**

- **Performance Scorecard shared between contractor and OASIS+ contracting officer**

OASIS+ Stay Connected

- **SAM.gov**

- **GSA OASIS+ Interact Community**

- **GSA.gov/OASISPlus**

- **OASIS+ Questions: pshc-dev@gsa.gov**

Questions?

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For more information, visit:

gsa.gov/FAST

Jennifer Auble
Assisted Acquisition Service
PM/COR Level III
20+ yrs of experience

Karthik Krishnan
Assisted Acquisition Service
PM/COR Level III
7+ yrs of experience

Objectives & Agenda

- Statements of Work (SOW) versus Performance Work Statements (PWS)
- Steps to create PWS
- PWS Examples (before & after)
- Helpful tips

Types of Requirements Documents

- **Statement of Work (SOW)**
  - Provide explicit work direction statements to follow
  - Typically used when the task is well-known
  - Described in specific terms
- **Statement of Objectives (SOO)**
  - Provide high level objectives
  - Vendors propose entire solution
  - More difficult to evaluate
  - Allows for innovation when no clear solution
- **Performance Work Statement (PWS)**
  - Establish High-Level Outcomes and Objectives for Performance
  - Emphasize the Outcomes
  - Focuses on measurable performances, outcomes and deliverables
  - Provide the problem, let contractor provide their solution
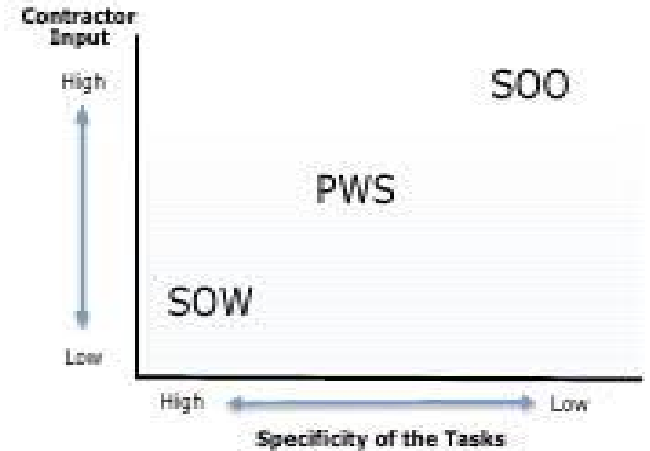
Successful Procurements
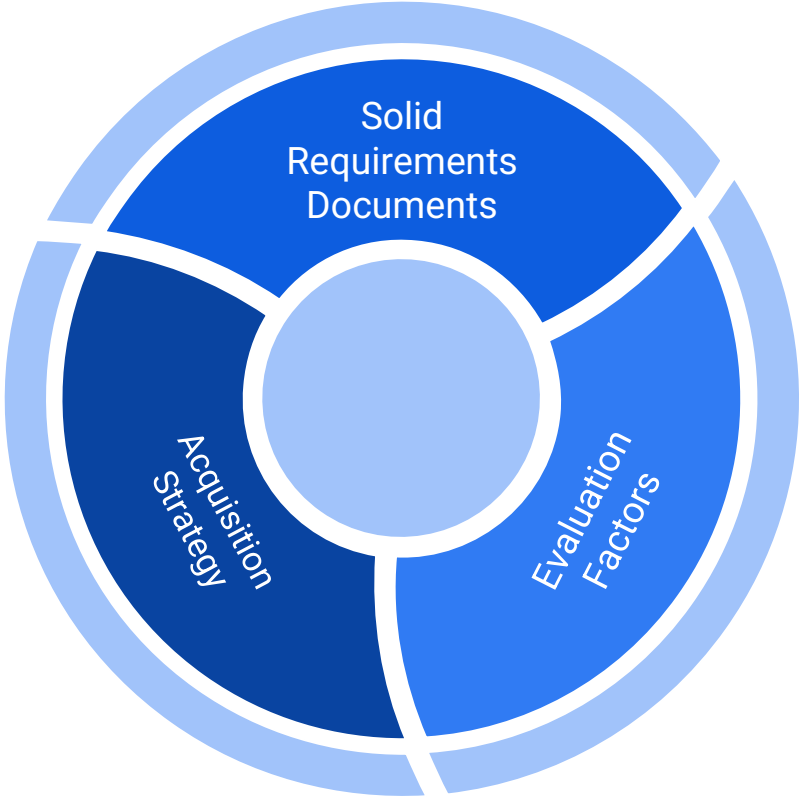
Performance Work Statement

- **Performance requirements**
  - Measurable (objective)
  - Outcome-based
- **Performance Standards**
  - Tie to performance requirements
  - Focus on Quality, Quantity , and Timeliness
- **Quality Assurance Surveillance Plan (QASP)**
  - Measure performance against standards

What you are trying to accomplish, __not__ "how" it will be accomplished

Step 1: Identify High Level Objectives

- **Background**
  - Introduces the organization and its goals
  - Current challenge
  - Provides context to the PWS
- **Objectives**
  - What are you trying to achieve?
  - Are there any overarching timelines to share

Step 2: Conduct Work Analysis (WBS)

- **Use tree diagram OR outline to break tasks into subtasks**
  - Organize from general to specific.
- **Shows the task, not who performs the task**
- **Limit to top three levels to avoid defining method of accomplishment**
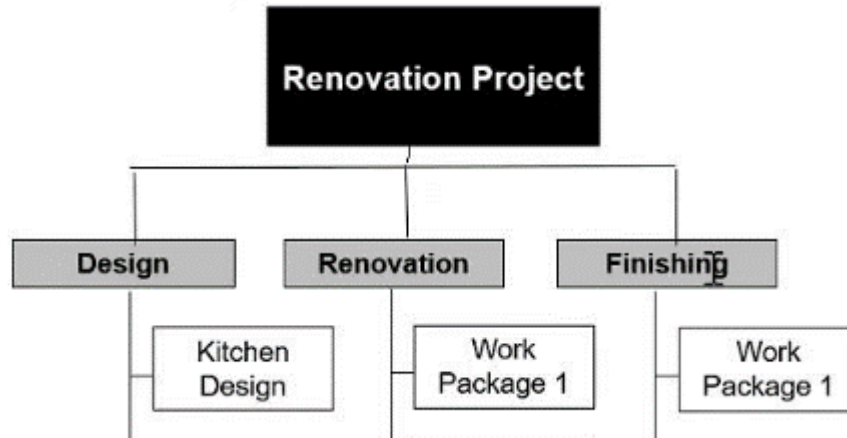
Performance-Based Acquisition Methodology

```
                    ┌─────────────────────────┐
                    │  1.0 PROGRAM SUPPORT     │
                    └─────────────────────────┘
                   ┌───────────────┴───────────────┐
        ┌────────────────────┐          ┌────────────────────────┐
        │ 1.1 KICK OFF MEETING│          │ 1.2 PROJECT MANAGEMENT │
        └────────────────────┘          └────────────────────────┘
                                       ┌───────────┴────────────┐
                            ┌────────────────────┐  ┌────────────────────────┐
                            │ 1.2.1 PROJECT PLAN │  │ 1.2.2 MONTHLY PROGRESS │
                            │                    │  │ REPORTS                │
                            └────────────────────┘  └────────────────────────┘
```
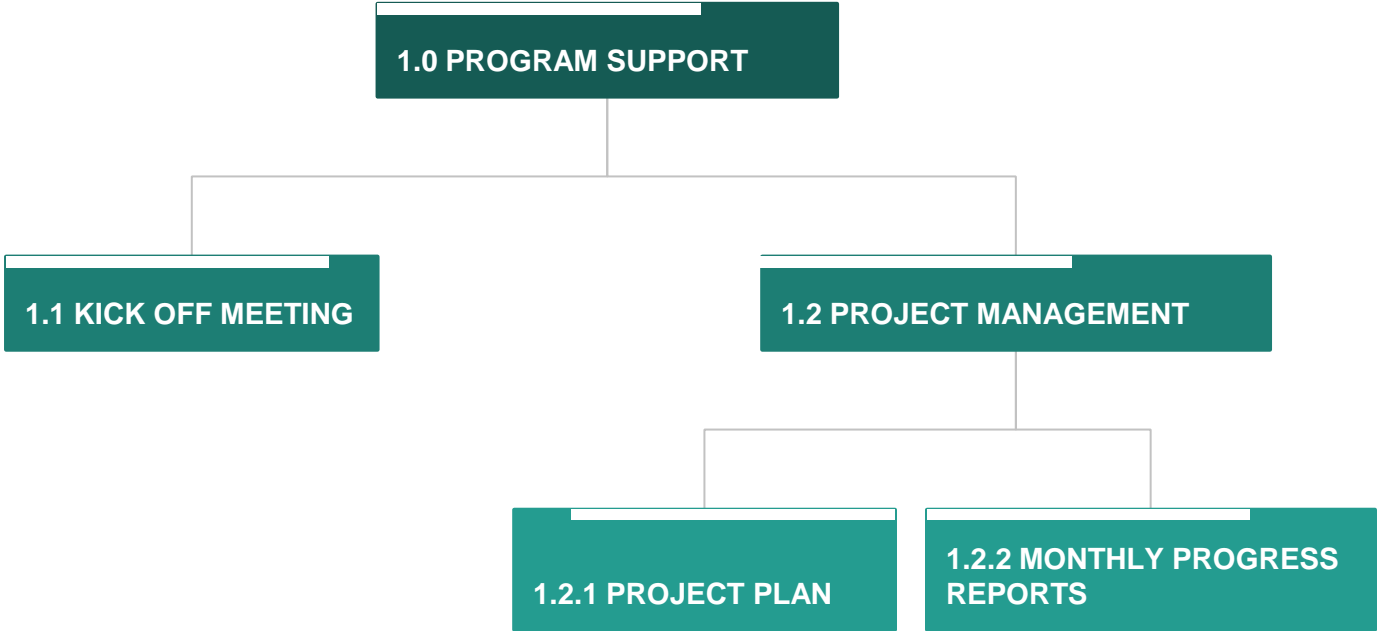
Performance-Based Acquisition Methodology
(Outline)

1. Project Management
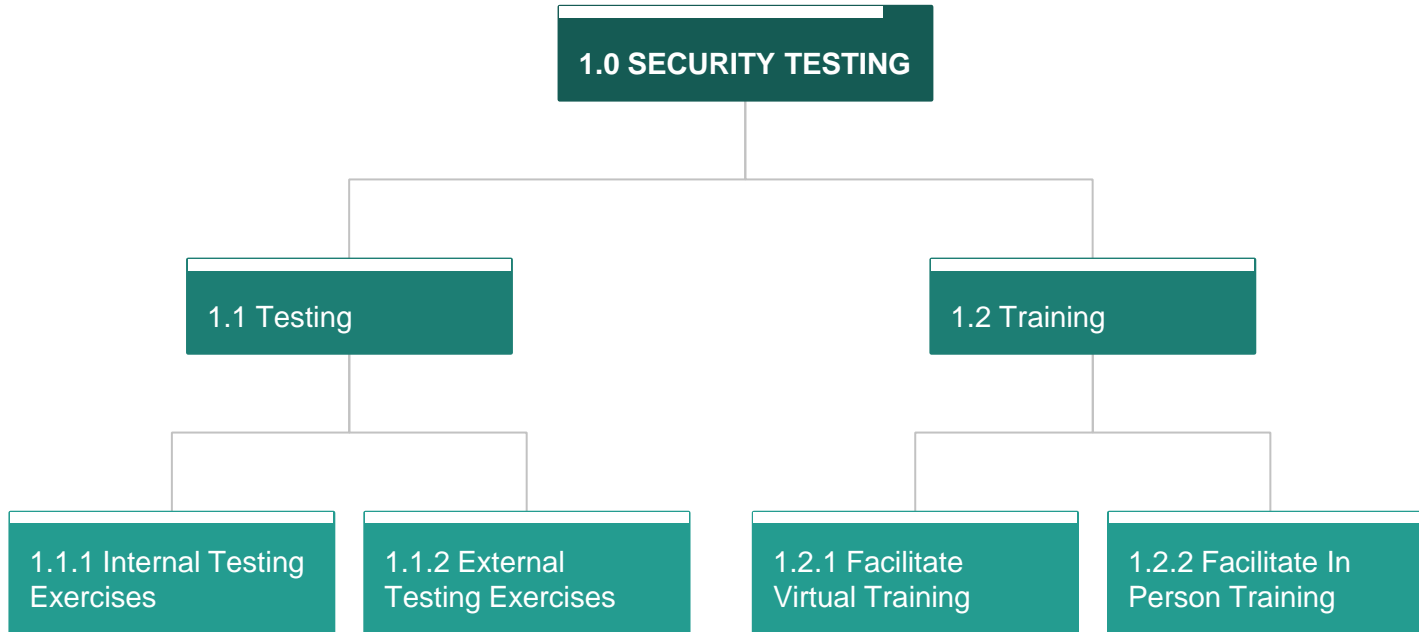
1.1 Project Kick off meeting

1.2 Program Management

    1.2.1 Project Management Plan

    1.2.2 Monthly Status Reports

    1.2.3 Weekly Updates

Performance-Based Acquisition Methodology

1.0 SECURITY TESTING

1.1 Testing

1.2 Training

1.1.1 Internal Testing Exercises

1.1.2 External Testing Exercises

1.2.1 Facilitate Virtual Training

1.2.2 Facilitate In Person Training

Performance-Based Acquisition Methodology
(Outline)

1. Security Testing

    1.1 Testing

        1.1.1 Internal Exercises

        1.1.2 External Exercises

    1.2 Training

        1.2.1 Facilitate Virtual Training

        1.2.2 Facilitate In Person Training

Step 3. Body of PWS (Technical Requirements)

- Divide work into tasks and tasks into subtasks
- Describe tasks in sequence
- Define Requirements
- Describe ALL work elements
- Describe any milestones clearly
- Delineate contractor responsibilities
- Discuss Government furnished information or property
- Provide known risks
- Create boundaries while not being too restrictive

*Consider the labor category for each task. Will depend on the level of detail you need.

Write To Express, Not To Impress

- The words must be understood not only by the drafters but also by the readers.
- Clearly define and express each requirement
- Minimize the use of complex words, legal phrases, and technical jargon
- Eliminate unnecessary words from sentences and omit unnecessary sentences from paragraphs.
- Convey single thoughts – 2-3 short sentences are better than complex sentences.
- Active voice – Doing versus what is to be done

The Action - Result - Context (ARC) Method

ACTION: What do you want the contractor to do?	RESULT: What result or outcome do you want?	CONTEXT: What is it for? What mission? What program?

ORIGINAL:

The Contractor shall train system end-users on how to use the system

Each requirement statement begins with "*The Contractor shall*" (or must)

Action verb

Result?
Is this the result we want?

Context

REVISION (focus on the desired result or outcome):

- The contractor shall provide [A] **training** [R] to end-users on how to use the system
- The contractor shall deliver [A] **a user manual** [R] for all aspects of the system

NOTE: Everything after a preposition is context... some prepositions: *to, for, by, with, around, on, under, 'so'* ("so" is a preposition when it would otherwise be combined with "that"), *after, through, of, at, in, between...*

Step 4: Identify deliverables and Performance Requirements

- **Draft overall performance requirements and standards**
  - What do you want contractor to produce?
  - What are the final output(s)?
  - How will the output(s) be inspected and accepted?
  - What standards will you be judging acceptance by?

Step 5: Develop Milestone Chart

- **Clear and defined expectations**
  - Be specific as possible with due dates
- **Ensure alignment with PWS**

Deliverable No.	Milestone / Deliverable	TOR Reference	Due Date
01	Task 1 Subtask 1 Project Kick off Meeting	C.4.1.1	1 day after Contract Kick off meeting
02	Task 1 Subtask 2 - Program Management Plan	C.4.1.2	Draft -At Kick-Off meeting. Final -5 workdays after Kick-Off Meeting
03	Task 1 Subtask 3 - Monthly reports	C.4.1.3	5th day of every month
04	Task 1 Subtask 4 - Weekly reports	C.4.1.4	1st day of every workweek, usually Mondays unless holiday.

6. Develop the Performance Requirements Summary

- **What is/are the final output(s)**
- **How will the output(s) be inspected / accepted?**
- **Standards**

Requirement	Criteria for Acceptance	Acceptable Quality Level	Method of Surveillance	"Incentives" Positive or Negative
Reports and Deliverables	100% compliance	100% compliance	Random Sampling	Contractor Performance Assessment report
Application Design & Development	Met all external and internal suspense dates	100% compliance	100% Inspection	Contractor Performance Assessment Report
Software Development	Met all external and internal requirements

100% functionality | 100% compliance | Random Sampling | Contractor Performance Assessment Report |

Example 1: Original

The Contractor shall design and facilitate a Test, Training & Exercise to enhance the performance of stakeholders during a COOP event.

- Who are the stakeholders?
- What type of exercise will be needed?
- Number of training sessions
- What does designing and facilitating a test look like?
- Is there a training platform that would need to be used?
- What is the training format?
- Additional details on training structure?
- What are the deliverables needed?

Example 1: Final

The Contractor shall:

- Design and facilitate a Test, Training & Exercise (TT&E) for the Emergency Relocation Group (ERG) during a COOP event.

  Stakeholder

  Type of Exercise

- Contractor shall design exercises on Cyber/Malware threats to government

  # trainings & details

- Build two virtual trainings with training modules by using agency's E-learning Style Guide. Use Platcore on ServiceNow as the Learning Management System (LMS).
- Knowledge checks and end of section assessments should be inserted at logical intervals.
- Deliverables will include handouts and presentations

Example 2: ORIGINAL

Family Life, External Studies, Audits, and Analysis.

- The contractor shall capture and submit information for agency's Campaign.
- Written progress reports shall be provided on the 10th day of each month.

1. What is the objective?
2. Need details on what this program is
3. Who is stakeholders
4. What analysis is needed?

Example 2: FINAL

Family Life, External Studies, Audits, and Analysis.

- The contractor will conduct a **comprehensive review** and report on **best practices** in the **field of relationship skills training** and resiliency.

- The contractor will **administer surveys** to input on **program reform and future state.**

- Provide **support for program reform** through meetings with **project leadership.**

- This program is the **skills-based relationship building program designed** to assist commanders in **building and strengthening Family structure.**

objective

Details on the type of report needed

Stakeholder

background/purpose

7. PWS Review Checklist

✓ Is there a clear deliverable for each task?

✓ Do you have clear boundaries around your tasks?
- how many, how often, what to include in xyz report

✓ Are desired versus required tasks/requirements clearly delineated?

✓ Are there no conflicting statements?

✓ Do you have no restrictive requirements?
- i.e. 9 yrs experience (why 9?)
- i.e. Asking for a communications/Public Relations company but requiring company to have done business in a particular niche sector
- Does only one company have the technology that you are requiring?

✓ Does your IGCE mirror your PWS tasks and responsibilities?

✓ Are all your acronyms defined?

✓ Are you confident multiple companies can bid?

Questions?

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gsa.gov/FAST

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Thank You