



GSA Public Buildings Service

Conversational Contracting

Client Enrichment Series

Acquisition Lifecycle (for RWA procurements that support small construction projects valued at \$250k or less)

October 24, 2024



Conversational Contracting October 24, 2024

*The presentation will
start at 2 pm eastern*

Welcome

Note: Phones are automatically muted during the presentation. Submit questions to our presentation team via your Q&A pane and we'll answer as many questions as possible during the presentation.

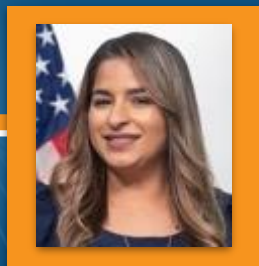
All questions will be responded to in writing in a formal Q&A document, posted along with the slide deck and session recording, on our website, <http://www.gsa.gov/ces>

Introductions



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A large, stylized graphic on the left side of the slide. It features a central circular element with the word "AGENDA" in a bold, sans-serif font. Surrounding this are various smaller circular icons and patterns, including a padlock, a brain with circuitry, and other abstract symbols, all in shades of blue and white. The background is a solid dark blue.

AGENDA

1. Acquisition Process
2. Constraints and Risks
3. Timelines (estimated)
4. Procurement Integrity
5. Holding the Contractor Responsible

Your RWA has been Accepted by PBS...

So what happens next?

- Project planning
- Procurement
- Contract award
- Execution of work
- Monitoring and quality assurance
- Invoicing and payments
- Project completion and closeout
- Customer feedback
- Contractor evaluation

Governing Regulations and Policies

- Federal Acquisition Regulation (FAR) - <https://www.acquisition.gov/browse/index/far>
- General Services Acquisition Manual / Regulation (GSAM/R) <https://www.acquisition.gov/browse/index/gsam>
- Office of Acquisition Policy Documents <https://www.gsa.gov/policy-regulations/policy/acquisition-policy/acquisition-policy-library-and-resources>
- PBS Procurement Instructional Bulletins (PIBs) and PBS Procurement Instructional Letters (PILs)
- Regional Guidance

Conditions Impacting the Acquisition Process



- **Regulatory Scrutiny and Compliance**
 - Increased and tighter oversight
 - Need for transparency
- **Emphasis on Small Business and Socioeconomic Programs**
 - Small Business set-asides
 - Socioeconomic initiatives
- **Innovation and Technology**
 - Technology modernization
 - Emerging technology adoption
- **Budgetary Constraints and Cost Efficiency**
 - Cost-control measures
 - Performance-based contracting
- **Geopolitical and Economic Uncertainty**
 - Impact of global events
 - Supply chain risks
- **Environmental, Social, and Governance (ESG) Considerations**
 - Sustainability requirements
 - Social responsibility
- **Evolving Procurement Processes**
 - Digital procurement platforms
 - Simplified acquisition processes

Acquisition Process

Planning Phase

- Identify needs and define acquisition strategy.
- Confirmation / Clarification of Requirements with Customer.
- Project Manager / Program Office, Customer Agency, Contracting Officer Representative (COR), and Contracting Officer (CO)

Solicitation Phase

- Announce requirements and invite bids/proposals.
- CO, Project Manager / Program Office, Customer Agency, and COR.

Evaluation Phase

- Assess proposals to determine best value.
- CO, COR, Project Manager / Program Office, and Technical Evaluation Team.

Award Phase

- Select contractor and formalize the contract.
- CO, Legal, and Project Manager, Program Office.

Post-Award Phase

- Manage and oversee contract performance.
- Contract close-out.
- Project Pulse Survey customer feedback solicited
- Project Manager / Program Office, COR, Budget, and CO

Planning Phase

(Pre-Solicitation Phase)

- *Project Manager / Program Office*
- *COR*
- *CO*

- Define the Requirement
- Prepare the Requirement Packet
- Develop the Acquisition Team
- Conduct Market Research
- Coordinate with Small Business
- Determine Acquisition Strategy
- Determine Evaluation Criteria

Requirements Packets

After RWA Acceptance

Most common documents required (additional documents may be required based on project and contracting office)

- Acquisition Plan (normally required for acquisitions exceeding the Simplified Acquisition Threshold (SAT)).
- Procurement Request/Initiating Documents
- Approved Reimbursable Work Authorization (RWA GSA Form 2957) with Funding
- Inherently Governmental Function Memo (if applicable)
- **Statement of Work (SOW), Performance Work Statement (PWS), Specification Documents (Drawings, Technical Specifications, Narratives, Supply Lists, etc)**
- Determination of Time for Construction Completion
- Project Charter and Project Management Plan (normally required if \$250k or more but can be required for projects less than \$250k - Determined by the Contracting Officer)
- Statement of Equivalent Rates for Federal Hires Form
- Government Cost Estimate (GCE) / Independent Government Estimate (IGE)

Customer Roles and Responsibilities

Identifies the need and budget for the requirement.

Formally initiates the process by submitting a work request to GSA (via eRETA).

Ensures funding is available for commitment and provides funding documents.

Prepares, submits, and enters into a Reimbursable Agreement with GSA.

Collaborates with PBS to clearly define the scope of work.

Provides technical agency SMEs and Stakeholders to participate in discussions/decision making.

Provides oversight and monitoring.

Assists in resolving issues.

Accepts the work / deliverable upon completion.

Ensures timely payment.

Maintains accurate records.

Acquisition Team Roles and Responsibilities

Program Office / Project Manager (PM)

Manages Scope, Budget, and Schedule throughout all phases of the project lifecycle.

Acts as the principal contact/coordinator of the project and all tasks accomplished by the project team member.

Collaborates with external customer, COR, CO to ensure contract deliverables meet project requirements.

Contracting Officer (CO)

Commits the Government.

Primary point of contact between the Government and contractors.

Responsible for compliance and enforcement of procurement regulations, policies, and law including ethics and conflict of interest guidelines.

Contracting Officer Representative (COR)

Appointed in writing by the CO.

Represents the CO (within their limited delegated authority) - **Cannot commit the Government.**

Bridge between Program Office, CO, and Contractors.

Conducts progress meetings and prepares inspection reports.

Monitors contractor performance and schedule.

Acquisition Team Roles and Responsibilities (cont'd)

Policy

Establishes acquisition guidelines and best practices.

Develops and interprets procurement policies and regulations.

Ensures alignment with federal laws and agency objectives.

Provides guidance and training to acquisition staff.

Legal

Ensures contracts comply with laws and regulations.

Reviews solicitation documents and contracts for legal sufficiency.

Provides legal advice on disputes, protests, and compliance issues.

Supports contract negotiations and resolution of legal matters.

Finance

Manages the financial aspects of acquisitions.

Oversee budget allocation and funding availability.

Conduct financial analysis and ensure cost-effectiveness.

Monitor financial compliance and manage payment processes.

Market Research and Small Business

- *Project Manager / Program Office*
- *Contracting Office*

Market Research

- Conducted by both the Project Manager / Program Office and Contracting Officer
- Lay the foundation for the requirement
- Analyze the market place
- Identify potential sources
- Identify competition and small business opportunities
- Identify risks

Small Business

- Policy (FAR Part 19)
 - Provide maximum practicable opportunities in acquisitions (including subcontracts) to small business concerns
- Key Stakeholders in the Approval Process:
 - Small Business Administration (SBA)
 - GSA Office of Small Business Utilization (OSBU)
- SBA 8(a) Business Development Program (“The 8(a) Program”)
 - Sole-source (non-competitive) actions under \$4.5 million for construction or service contracts



Evaluation Criteria

- *Contracting Office*
- *Project Manager / Program Office*
- *COR*

- Technical Capability
- Price or Cost
- Past Performance
- Experience
- Socioeconomic Factors
- Small Business Considerations (FAR Part 19)
- Management Capability
- Compliance and Regulatory Factors

Solicitation Phase

- *Project Manager / Program Office*
- *COR*
- *CO*

- Synopsise the requirement (if required)
- Develop the solicitation
- Review the solicitation
- Issue solicitation and any amendments
- [SAM.gov \(open market\), GSA Schedules, Sole Source, 8\(a\) Program](#)
- Conduct pre-proposal conference / site visit (if required)



Evaluation Phase

- *Project Manager / Program Office*
- *COR*
- *CO*

- Receive proposals
- Conduct proposal compliance check
- Evaluate proposal
- Conduct risk assessment of proposal

Award Phase

- *Contracting Office*
- *Legal*

- Conduct source selection
- Conduct negotiations (if applicable)
- Conduct pre-award clearance
- Determine Contractor responsibility
- Prepare contract and documents
- Conduct contract review and approval
- Award the contract
- Send notification to unsuccessful offerors
- Conduct debriefings
- Protests

Post-Award Phase

- *Project Manager / Program Office*
- *COR*
- *Budget*
- *CO*

- COR Appointment
- Conduct kickoff meeting
- Administer the contract
- Monitor contractor performance
- Execute contract modifications as required
- Execute invoicing and payments
- Contract termination (if required)
- Close-out contract
- Write post-performance review



Constraints and Risks





Constraints and Risks

- **Constraints**
 - Laws and regulations
 - Scope definition
 - Budget
 - Resource availability
 - Interagency coordination
 - Environmental requirements
 - Security requirements
 - Economic and political climate
- **Risks**
 - Funding delays and reductions
 - Scope creep
 - Contractor performance
 - Regulatory changes
 - Supply chain issues
 - Protests and Litigation
 - Economic factors
 - Technical Challenges
 - Natural disasters and unanticipated events

Mitigating Constraints and Risks



- Collaboration in Source Selection
- Clear contract language
- Realistic schedule development
- Risk management plans
- Regular inspections
- Monitor contractor performance
- Documentation and Reporting
- Frequent communication between all stakeholders

How can **YOU** help the Program Office Mitigate Constraints and Risks

- Early communication of requirements
- Clearly define requirements
- Identify and analyze risks
- Establish realistic schedules
- Adhere to the established schedules
- Minimize unnecessary changes
- Ensure funding and resources are available
- Provide subject matter experts to help with the source selection process and monitor the contract
- Report product and performance issues as early as possible to the COR and CO
- Provide regular feedback and risk management updates



Timelines

Program Office Actions / Steps that Impact Contract Action Timelines

- Requirements definition and validation
- Acquisition planning:
 - Acquisition strategy development
 - Cost estimates and funding
- Solicitation preparation and release
- Proposal evaluation
- Contract award
- Post-award

General Timelines (estimated): The below timelines can vary based on the complexity of the request, completeness of the information/documents provided, the need for any additional approvals or clarifications, RFP/bid type, and contract vehicle.

Phase	Timeline	Action
RWA Initiation and Submission	90 - 120 days before FY end or project start	Begins when a customer agency identifies a need for GSA's services and submits an RWA. This includes defining the scope of work, estimating costs, and specifying the timeline.
RWA Review and Acceptance	10 - 15 business days	GSA reviews the submitted RWA for completeness, accuracy, and compliance with regulations. This involves assessing the scope, budget, and feasibility.
Project Planning and Funding Obligation	30 - 60 days	Planning: Once accepted, detailed planning occurs, which includes finalizing the scope, developing detailed cost estimates, and creating a project schedule. Funding Obligation: GSA formally obligates the funds provided by the customer agency, ensuring that resources are available for the project.
Project Execution and Delivery	Varies by project (months to years)	GSA manages the execution of the project, which includes contracting, construction, or service delivery, as specified in the RWA. GSA provides regular updates and status reports to the customer agency throughout the project lifecycle.
Project Closeout	30 - 60 days	Upon completion of the work, GSA conducts a final review and closes out the project. This includes verifying that all work is done to specifications and settling any remaining financial transactions. GSA collects feedback from the customer agency to improve future service delivery.

Fiscal Year-End: Agencies are encouraged to submit these requests by June 30th to allow enough time for processing.



Procurement Integrity

Procurement Integrity

Sharing Procurement Information with the Program Office while Maintaining Procurement Integrity.....

- Acquisition planning and strategy
- Solicitation development and requirements
- Pre-Solicitation coordination
- Contract administration

Key principles to help maintain procurement integrity.....

*Only “need to know”
and at CO’s discretion.*

- To avoid competitive advantage, limit the sharing of:
 - Detailed cost or pricing data
 - Source selection information
- Protect proprietary and sensitive information
- Always be fair and transparent



Holding the Contractor Responsible

Contractor Roles and Responsibilities

Service or product provider

Subject Matter Expert

Partner to the Government

Subcontractor management

- Adheres to contract terms
- Meets and maintains contract quality and standards
- Performs all inspections and test required by the contract
- Financial management
- Communicates and reports
- Complies with laws, regulations and policies
- Maintains ethical conduct
- Manages risks

Holding the Contractor Responsible



Acquisition Team

- Contracting Officer, Contract Specialist
- Project Manager / Program Office
- Customer Agency
- Contracting Officer Representative
- Policy
- Legal
- Finance

- Pre-Award responsibility determination
- Clear and detailed contract requirements
- Continuous and clear communication
- Monitor contractor, conduct performance evaluation and provide feedback
- Contract modifications and change orders
- Enforce warranties and guarantees
- Escalate issues and concerns
- Maintain documentation
- Contractual remedies
- Legal action
- Lessons learned and improvements
- **Tools/Systems:** System for Award Management (SAM), GSA Contract Compliance Assessment (CCA); Contractor Performance Assessment Reporting System (CPARS); Federal Awardee Performance and Integrity Information System (FAPIS)



Customer Project POCs,
please participate!

GSA U.S. General Services Administration

Project Pulse Survey
Striving for Continued Success in Service Delivery

Background and Benefits

PBS aims to provide excellent customer services in all aspects of project delivery. The Project Pulse Survey is a quick and easy way for customers to provide feedback on our RWA and Leasing project delivery efforts. PBS uses the valuable information to evaluate our performance and identify best practices and areas for improvement at different stages of project delivery.

We administer the monthly survey on customer RWA and Leasing space projects, regardless of size. The short survey is conducted online and takes just a few minutes to complete.

When is the Project Pulse Survey Administered?

Starting in the first quarter of 2021, PBS will administer the survey up to three times during each RWA and Leasing project.

RWA Project	Leasing Project
Acceptance (for projects greater than \$25,000)	At Request for Lease Proposal
Expense Midpoint (for projects greater than \$250,000)	At Lease Award
Substantial Completion	Lease Effective Date

What Does the Survey Measure?

Each brief survey's questions vary based on when in the project lifecycle the survey is sent. In general, the survey evaluates:

- Overall Satisfaction
- Communication and Transparency
- Clear Point of Contact
- Satisfaction of Requirements
- Cost and Budget
- Schedule
- Quality of Work

PBS Project Pulse Survey (PPS)

An easy way for you to provide project feedback.

Sent to customers at key points during a project's lifecycle.

Customer project POCs are asked to:

- Rate their **Overall Satisfaction**
- Weigh in on specific project attributes including:
 - **Communication and Transparency**
 - **Managing to the Schedule / Budget**
 - **Overall Quality of Work**
- Offer comments about your GSA project experience

See our [PBS Fact Sheet - Project Pulse Survey](#)

Survey email - projectpulsesurveys@research.gsa.gov

Subject line - "How did GSA do?...Requesting feedback on your RWA/Lease project..."

Points of Contact and Helpful Links

- **Regional RWA Managers**
<https://www.gsa.gov/real-estate/real-estate-services/reimbursable-services-program/contact-us>
- **Regional client solutions**
<https://www.gsa.gov/about-us/organization/public-buildings-service/office-of-portfolio-mgmt-customer-engagement/office-of-customer-engagement/regional-client-solutions>
- **Client outreach**
<https://www.gsa.gov/about-us/organization/public-buildings-service/office-of-portfolio-mgmt-customer-engagement/office-of-customer-engagement/client-outreach>
- **PBS resource fact sheets**
<https://www.gsa.gov/real-estate/real-estate-services/federal-customers/pbs-resource-fact-sheets>



Thank You

Join us for these upcoming
Client Enrichment Series
events...

Watch our [class recordings](#)
visit www.gsa.gov/ces
email clientenrichmentseries@gsa.gov

eRETA Digest

Thursday, November 7th
2pm - 3:30pm eastern

[Register Today!](#)

Water Quality Management Update

Tuesday, November 19th
1pm-2:30pm eastern

[Register Today!](#)

A Conversation on Hybrid Work and Sustainability

Thursday, December 5th
2pm - 3:30pm eastern

[Register Today!](#)

Coming Soon!

Occupancy Metrics

Implementing OMB Memo MPM 24-01

