

Competitive Sourcing Preliminary Planning

Competition Preliminary Planning

Agencies conduct competition pre-planning

- Identify project scope and activity groupings
- Select streamlined or standard competition method
- Assess project workload and data systems
- Determine and document activity baseline costs
- Develop and document initial project schedule
- Determine participant roles and responsibilities
- Appoint competition officials
- Inform incumbent service providers of the date that the public announcement will be made
- Announce competition in FedBizOps, www.fbo.gov

Competition Preliminary Planning

Identify project scope and activity groupings

- Review FAIR Act Inventory and identify activity(s) and full-time equivalent (FTE) positions selected for competition
- Determine project composition
 - Single or multi functional activity
 - Single or multi location activity
 - Organizational or functional
- Identify and notify customers
- Assess impact to the agency if competed
 - Ability of the activity to effectively compete
 - Availability of resources to support the competition

Competition Preliminary Planning

Select streamlined or standard competition method

- Streamlined
 - 65 or fewer FTE
 - 90-135 days to complete
- Standard
 - any number of FTE
 - 12-18 months to complete

Competition Preliminary Planning

Assess project workload and data systems

- Identify products and services
 - Who produces them
 - What are the products and services
 - When are they delivered
 - Where do they go
 - How are they produced
- Determine if sufficient reliable data are available to prepare
 - Performance Work Statement
 - Agency tender

Competition Preliminary Planning

Determine and document activity baseline costs

- Historical consumption, not budget input
- Labor and non-labor costs, including
 - Personnel
 - Facility operations and maintenance
 - Capital investment facilities and equipment
 - Supplies and equipment
 - Contract services
 - Training

Agencies shall not use agency budgetary estimates to develop Government cost estimates in a streamlined or standard competition. OMB Circular A-76

Competition Preliminary Planning

Develop and document initial project schedule

- Tasks and sub-tasks
- Start and finish dates
- Responsible person(s)
- Other considerations
 - Task slippage
 - Federal holidays
 - Staff turnover

Project management software facilitates achieving project schedules.

Competition Preliminary Planning

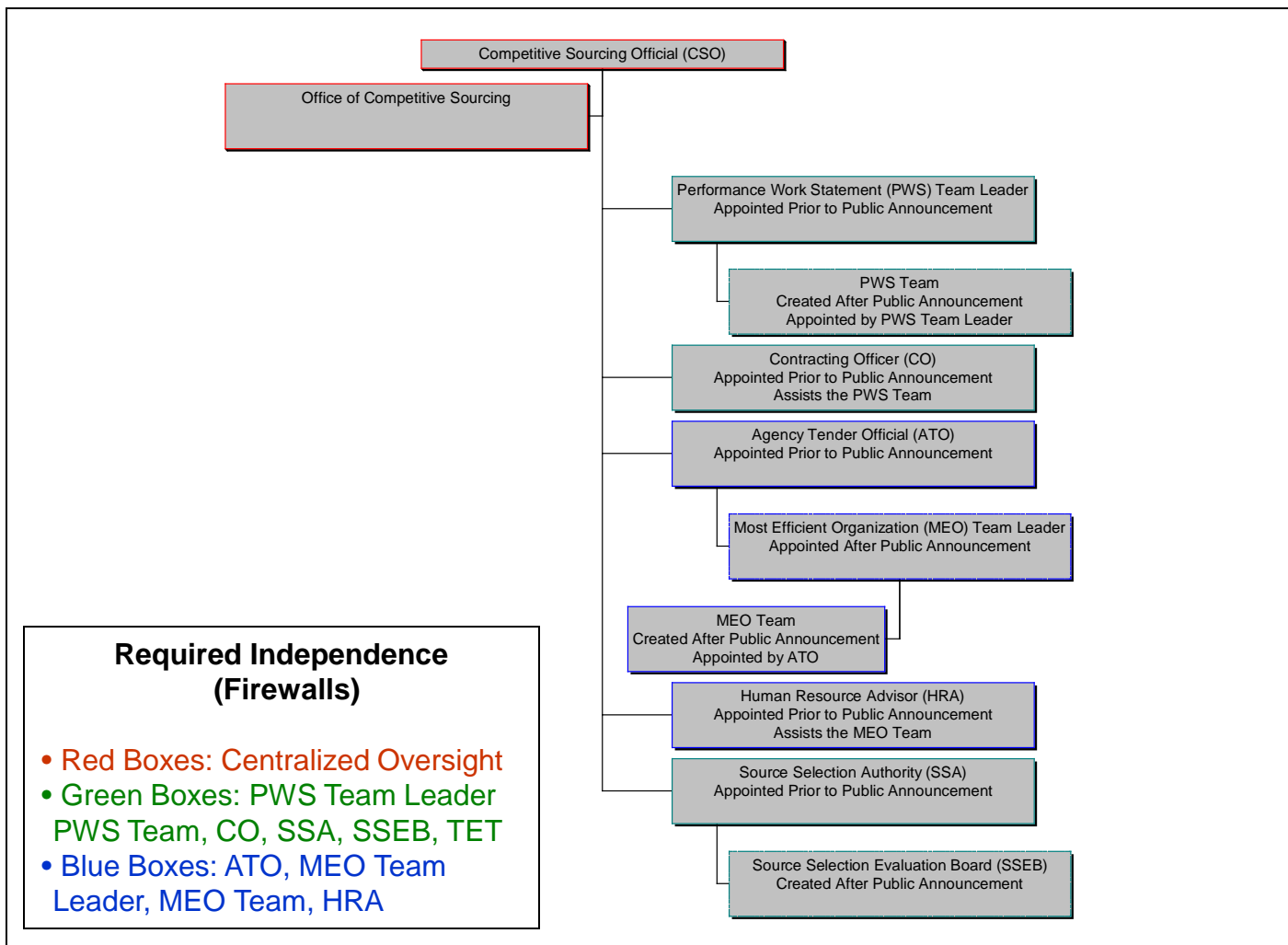
Determine participant roles and responsibilities

- Project management
- Senior management reporting
- Policy and procedure interpretation
- Competitive sourcing training
- Customer and stakeholder notification
- Employee representative participation
- Support consultant involvement

Competition Preliminary Planning

Appoint competition officials

- Performance Work Statement (PWS) Team Leader leads a team of functional experts to develop the PWS and Quality Assurance Surveillance Plan (QASP)
- Contracting Officer (CO) works with the PWS Team Leader to publish the work requirements in FedBizOps and conducts the competitive procurement process
- Agency Tender Official (ATO) leads a team of functional experts to prepare the agency's tender or bid
- Human Resource Advisor (HRA) performs employee relations assistance and assists the ATO to prepare the agency's bid
- Source Selection Authority (SSA) is responsible for making the source selection decision and appoints the Source Selection Evaluation Board (SSEB)



Performance Work Statement (PWS) Team Leader

The PWS team leader shall

- be an inherently governmental agency official;
- comply with both the FAR and this circular;
- be independent of the ATO, HRA and MEO team;
- develop the PWS and quality assurance surveillance plan;
- determine Government-furnished property (GFP);
- assist the CO in developing the solicitation; and
- assist in implementing the performance decision.

Team Designations

Performance Work Statement (PWS) Team

After public announcement, the PWS team leader shall appoint a PWS team comprised of technical and functional experts. The PWS team shall comply with the FAR and this [A-76] circular, and assist the PWS team leader with

- developing the PWS including supporting workload data, performance standards, and any information relating to the activity being competed;
- determining Government-furnished property;
- assisting in the CO's development of the solicitation;
- developing a quality assurance surveillance plan and, as required, updating this plan based on the performance decision; and
- implementing the performance decision.

Contracting Officer (CO)

- The CO shall
 - be an inherently governmental agency official;
 - comply with both the FAR and this circular;
 - be independent of the ATO, human resource advisor (HRA), and MEO team; and
 - be a member of the PWS team.
- Additionally, the CO shall notify the Agency Tender Official of the performance decision.
- For a performance decision favoring the agency, the CO shall establish an MEO letter of obligation with an official responsible for performance of the MEO.

Agency Tender Official (ATO)

The ATO shall

- be an inherently governmental agency official with decision-making authority;
- comply with this circular;
- be independent of the contracting officer (CO), source selection authority (SSA), source selection evaluation board (SSEB), and performance work statement (PWS) team;
- develop, certify, and represent the agency tender;

Agency Tender Official (ATO) (continued)

The ATO shall

- designate the most efficient organization (MEO) team after public announcement of the standard competition;
- provide the necessary resources and training to prepare a competitive agency tender; and
- be a directly interested party.

An agency shall ensure that the ATO has access to available resources (e.g., skilled manpower, funding) necessary to develop a competitive agency tender. OMB Circular A-76

Team Designations

Most Efficient Organization (MEO) Team

After public announcement, the ATO shall appoint an MEO team comprised of technical and functional experts. The MEO team shall comply with this [A-76] circular and assist the ATO in developing the agency tender.

Human Resource Advisor (HRA)

The HRA shall

- be an inherently governmental agency official and a human resource expert,
- comply with this [A-76] circular, and
- be independent of the
 - Contracting Officer,
 - Performance Work Statement team,
 - Source Selection Authority, and
 - Source Selection Evaluation Board.

Human Resource Advisor (continued)

Employee and Labor-Relations Requirements

The HRA shall, at a minimum, perform the following

- interface with directly affected employees (and their representatives) from the date of public announcement until full implementation of the performance decision,
- identify adversely affected employees,
- accomplish employee placement entitlements in accordance with 5 CFR Part 351 (reduction-in-force procedures),
- provide post-employment restrictions to employees,
- determine agency priority considerations for vacant positions and establish a reemployment priority list(s) in accordance with 5 CFR Part 330, and
- provide the Contracting Officer with a list of the agency's adversely affected employees, as required by this attachment and FAR 7.305(c) regarding the right of first refusal for a private sector performance decision.

Human Resource Advisor (continued)

MEO Team Requirements

The HRA shall assist the ATO and MEO team in developing the agency tender. During development of the agency tender, the HRA shall be responsible for

- scheduling sufficient time in competition milestones to accomplish potential human resource actions in accordance with 5 CFR Part 351 [Reduction in Force],
- advising the ATO and MEO team on position classification restrictions,
- classifying position descriptions, including exemptions based on the Fair Labor Standards Act,

Human Resource Advisor (continued)

MEO Team Requirements

The HRA shall assist the ATO and MEO team in developing the agency tender. During development of the agency tender, the HRA shall be responsible for

- performing labor market analysis to determine the availability of sufficient labor to staff the MEO and implement the phase-in plan,
- assisting in the development of the agency cost estimate by providing annual salaries, wages, night differentials, and premium pay,
- assisting in the development of the timing for the phase-in plan based on MEO requirements, and
- developing an employee transition plan for the incumbent agency organization early in the standard competition process.

Human Resource Advisor (continued)

Additional Responsibilities

- Cancellation of a Streamlined or Standard Competition
 - The HRA shall notify directly affected employees and their representatives of the cancellation
- Cancellation of a Solicitation
 - The HRA shall notify directly affected employees and their representatives of the cancellation
- Performance Decision
 - The HRA shall notify directly affected employees (and their representatives) of the performance decision

Source Selection Authority (SSA)

- The SSA shall
 - be an inherently governmental agency official appointed in accordance with FAR Part 15.303 [Source Selection, Responsibilities];
 - comply with both the FAR and this circular when performing a streamlined and standard competition; and
 - be independent of the ATO, HRA, and MEO team. The SSA shall not appoint an SSEB until after public announcement.
- Additionally, The SSA shall ensure that the CO offers a debriefing to all private sector offerors, public reimbursable sources, the ATO, and directly affected Government personnel (and their representatives), in accordance with FAR 15.503

Team Designations

Source Selection Evaluation Board (SSEB)

After public announcement of a standard competition that will be a negotiated procurement, the SSA shall appoint an evaluation team (referred to as the SSEB) in accordance FAR Subpart 15.303. The SSA shall ensure that the SSEB complies with the source selection requirements of the FAR and this attachment [B]. PWS team members who are not directly affected Government personnel may participate on the SSEB.

Competition Preliminary Planning Incumbent Service Providers' Notification

Inform any incumbent service providers of the date that the public announcement will be made

Announce Competition in FedBizOps and Initiate the Competition

The public announcement shall include, at the minimum

- the agency,
- agency component,
- location,
- type of competition (streamlined or standard),
- activity being competed,
- incumbent service providers,
- number of Government personnel performing the activity,
- name of the Competitive Sourcing Official (CSO),
- name of the contracting officer,
- name of the Agency Tender Official (ATO), and
- projected end date of the competition.