



U.S. General Services Administration

# MOBIS

GSA Schedule

Mission Oriented Business  
Integrated Services

874

January 2006



Multiple Award  
Variable Contract Periods  
20 Years from Date of Award

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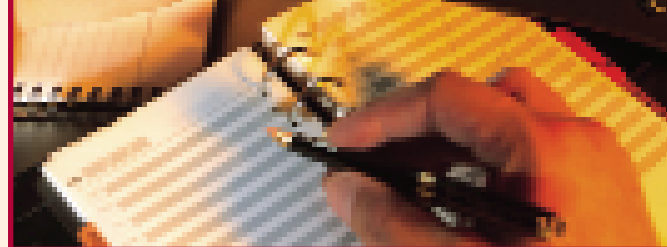
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# Summary of Services



## Mission Oriented Business Integrated Services

The MOBIS Schedule offers a full range of management and consulting services that can improve the performance, quality, timeliness and efficiency of services provided by the federal government.

MOBIS contractors offer their expertise in the following areas:

- Business consulting services, assessments, studies, reports and related training
- Facilitation services, conflict resolution, problem solving
- Survey design, implementation and analysis
- Off-the-shelf and customized MOBIS-related training
- OMB Circular A-76 studies and privatization efforts
- Program management, program integration, project management

The effort needs to be limited to a defined task with a specific start and end to the task. No SIN should be used to provide for an ongoing requirement for an indefinite time period. This schedule is not for Administrative Support Services. Personal services, as defined in FAR Part 37.104, are prohibited under the schedules program.

## What is a GSA Schedule?

A Multiple Award Schedule, also known as a Federal Supply Schedule or GSA Schedule, is a powerful contracting tool. Each Schedule consists of contracts that GSA has negotiated with a number of qualified companies. Schedule contracts are awarded to companies supplying the same types of items - in this case, mission oriented business integrated services - at varying prices.

## Advantages of GSA Schedules

### Flexibility

- Extensive selection of contractors offering diverse services
- Blanket Purchase Agreements and Contractor Teaming Arrangements
- Combine with other schedules for Total Solutions
- Negotiate additional discounts when awarding a task order
- No limitations on the dollar value of your order

### Peace of Mind

- Already synopsised on the FedBizOpps (FBO) website
- Schedules comply with the Competition in Contracting Act (see FAR 6.102 (d)(3))
- e-Tools that provide fair opportunity as required by Section 803 of the National Defense Authorization Act for 2002
- Pricing based on most favored customer discounts
- Task orders count towards socioeconomic goals (see FAR 8.404)

## Success Story

As the regional management officer of the Department of Commerce's western United States network of offices charged with promoting exports, I routinely oversee procurement activities.

One of the challenges of this activity is the ability to identify exceptional vendors quickly. The next step is to get our selections through the federal procurement process. GSA's MOBIS program is the solution to our needs.

The MOBIS program provides manageable lists of well-qualified contractors from across the country, with companies of all sizes and experience...

This program is yet one more example of how GSA is working to help agencies keep their resources focused on their mission!

David Tumblin  
Director, National Field Support Team  
Office of Domestic Operations  
U.S. Commercial Service  
U.S. Department of Commerce

## Control

- Direct relationship between agency and contractor
- Fixed-price task orders may include performance incentives
- Electronic procurement tools that facilitate market research and RFQs/RFIs exchanges
- Reduced procurement lead times and contract administration

## Authorized Users

The following entities are authorized to use GSA Schedules:

- All federal agencies and activities in the executive, legislative and judicial branches
- Mixed ownership government corporations (as defined in the Government Corporation Control Act)
- The government of the District of Columbia
- Government contractors authorized in writing by a federal agency pursuant to 48 CFR 51.1
- Other activities and organizations authorized by statute or regulation to use GSA as a source of supply

## Tip

FAR Parts 13 and 19 do not apply to orders placed against GSA Schedules, except for the provision at 13.303-2(c)(3).

## Did You Know?

Did you know that the following organizations are authorized to use GSA Schedules?

- Kennedy Center
- American Red Cross
- United Nations
- Government of Guam
- International Coffee Organization
- World Tourism Organization
- NATO

See the link to "Eligibility to Use GSA Sources" at [www.gsa.gov/scheduleseligibility](http://www.gsa.gov/scheduleseligibility).

## Geographic Coverage

All MOBIS contractors are authorized to offer their services in one of three geographic areas:

- "Domestic Only" - which covers delivery to the 48 contiguous states; Washington, DC; Alaska; Hawaii; Puerto Rico and U.S. territories
- "Overseas Only" - which covers delivery to points outside the 48 contiguous states; Washington, DC; Alaska; Hawaii; Puerto Rico and U.S. territories
- "Worldwide" - which covers delivery domestically AND overseas



# Scope of Contract



## Summary of MOBIS Services and Products

MOBIS Schedule contractors possess the necessary expertise to facilitate how the federal government responds to a continuous stream of new mandates and evolutionary influences. These include the President's Management Agenda; Government Performance and Results Act; Federal Acquisition Streamlining Act; OMB Circular A-76; Federal Activities Inventory Reform Act; government reinvention initiatives such as improving customer service, benchmarking and streamlining; strategic sourcing; downsizing; and privatization. As these influences evolve and mandates are enacted, the specific support provided by MOBIS contractors will evolve accordingly.

In addition, MOBIS contractors can provide the government with the requisite expertise to enable federal agencies to meet mission requirements requiring integrated business solutions.

A diverse group of MOBIS contractors provide services and support products to support agencies in accomplishing mission oriented business efforts. These efforts may include, but are not limited to, quality management; business process reengineering; strategic and business planning; knowledge management consulting; benchmarking; strategic sourcing; ISO 9000; activity-based costing; financial management analysis related to an improvement effort; statistical process control; construction and implementation of surveys; individual and organizational assessments and evaluations; process improvements; process modeling and simulation; performance measurement; organizational design; change management; development of leadership/management skills; and training in improving customer service and satisfaction, assistance in the performance of privatization studies, training in support of related business functions, program integration, project management and alternative dispute resolution support.

## Services Outside the Scope of Contract

MOBIS is designed to provide agencies with expertise in all areas of mission oriented business tasks. MOBIS should not be used when the preponderance of work can be accomplished under another professional services schedule. Additionally, MOBIS should not be used to acquire supplies that are not integral to the task and incidental to the services being provided. The acquisition of Information Technology (IT) is not forbidden, however, any software, hardware, or IT services must be incidental to the management improvement effort and directly linked to the successful performance of the task. As there are no specified definitions of "incidental", the procuring contract officer should make this determination. Typical examples of services that are not appropriate for purchase under a MOBIS task order include administrative support unless directly related to a MOBIS requirement; financial audits; engineering services; IT systems integration; network services; volume purchase of IT hardware, software, or software development; database planning; marketing and media services; general training; human resources and construction and architect-engineering services as set forth in FAR Part 36 (including construction, alteration and repair of buildings, structures or other real property).

Personal Services Contracts as defined in FAR 37.101 and FAR 37.104 are strictly prohibited. Agencies are prohibited from utilizing service contracts to augment government staff. A contractor is equally prohibited from knowingly offering to supplement government staff by engaging in a personal services contract/task order.

**Keep in mind that services outside the scope of MOBIS are often available through other GSA Schedules. For a complete listing of GSA Schedules, please visit the Schedules e-Library at <http://www.gsa.gov/elibrary>**

# MOBIS Products and Services



## SIN 874-1 Consulting Services

Contractors provide expert advice, assistance, guidance and counsel to improve the performance, quality, timeliness and efficiency of services provided by the federal government. Task orders may include but are not limited to:

- Strategic, business and action planning
- Acquisition and procurement planning and execution
- Performance-based budgeting
- Systems alignment
- Cycle time
- Organizational assessments
- High performance work
- Leadership systems
- Performance measures and indicators
- National security strategy and policy development
- Emergency management and preparedness
- War gaming
- Medical and healthcare consulting
- Budget, manpower and acquisition planning and strategy
- Business modeling and simulation
- Program audits and evaluations
- Process and productivity analysis and improvement
- Quality assurance and technical support
- Organizational space management
- Weapons systems program planning
- Workforce and succession planning
- Customized training

## The Economic Growth Office of USAID/Egypt Utilizes the MOBIS Schedule for Policy Analysis Support

The MOBIS contractor provided a Customer Satisfaction Review of USAID Partners involved in implementing a program to improve farmer access to the horticultural export market.

USAID assistance strategy in Egypt emphasizes private sector development as a means of fostering rapid economic growth. One primary objective towards the realization of this goal is to enhance the business environment for the emergence of competitive Egyptian firms, capable of expanding their export opportunities and promoting growth. In order to assess progress towards these goals, the Results Reporting Support Activity (RRSA) conducts periodic Client Satisfaction Reviews (CSRs). A Client Satisfaction Review aims to measure the content, quality, and results of USAID services from the perspective of the clients themselves, with a focus on the contribution of USAID Partner activities on clients' employment opportunities and income.

The most recent CSR published in December 2003 analyzed services provided by five Partners within the Growth through Globalization (GTG) Program to three target beneficiary groups: private firms, trade associations, and smallholders (assisted farms). Following up on findings of previous Reviews, it explored client perspectives on the content and quality of Partner services, and their assessment of the result of these services on their income, exports, production, and employment. The CSR also provided a forum for clients to rate how satisfied they have been with Partner services, and for clients to offer their recommendations on how to better meet their needs.

The findings from these reviews are relied upon by USAID Partners to refine their services in order to most effectively promote private sector competitiveness in Egypt. Indeed, results of the 2003 CSR indicate that the overall level of business client satisfaction has progressively improved over time from 63 percent in 1998 to 72 percent in 2003. Additionally, in the 2003 CSR, 74 percent of trade and farmer associations and an overwhelming 99 percent of smallholders stated they were satisfied with IR 2 (Intermediate Results 2) Partner services. IR 2 Partners include small holders, wholesalers, and producer organizations.

Carlton M. Bennett  
Director, Office of Procurement  
USAID/Cairo



### SIN 874-2 Facilitation Services

Includes facilitation and related decision support services for agencies engaged in collaborative efforts, working groups or integrated product, process or self-directed teams and expert services in support of formal and informal Alternative Dispute Resolution (ADR) programs. ADR in support of Equal Employment Opportunity (EEO) disputes is specifically excluded as it is covered under the Human Resources and Equal Employment Opportunity Services Schedule. Task orders may include but are not limited to:

- The use of problem solving techniques
- Resolving disputes, disagreements and divergent views
- Defining and refining the agenda
- Convening and leading large and small group briefings and discussions
- Providing a draft for the permanent record
- Recording discussion content and focusing on decision-making
- Debriefing and overall meeting planning
- Logistical meetings/conference support when performing technical facilitation
- Preparing draft and final reports for dissemination

### SIN 874-3 Survey Services

Obtain expert consultation, assistance and deliverables associated with all aspects of surveying within the context of MOBIS. Contractors shall assist with, and/or perform all phases of the survey process to include, but not limited to:

- Planning survey design
- Defining and refining the agenda
- Determining proper survey data collection methodology
- Administering surveys using various types of data collection methods
- Sampling; survey development
- Survey database administration
- Analysis of quantitative and qualitative survey data
- Pretest/pilot surveying
- Assessing the reliability and validity of data

- Production of reports to include, but not limited to:
  - Description and summary of results with associated graphs, charts and tables
  - Description of data collection and survey administration methods
  - Discussion of sample characteristics and representative nature of data
  - Analysis of non-response
  - Briefings of results to include discussion of recommendations and potential follow-up actions

### SIN 874-4 Training Services

Includes off-the-shelf, or customized off-the-shelf training packages related to specific business services. Task orders may include, but are not limited to:

- Customer service; team building
- Performance measurement
- Performance problem solving
- Business process reengineering
- Strategic planning
- Process improvement
- Performance problem-solving
- ISO 9000
- Statistical process control
- Quality management
- Benchmarking
- Change management

### SIN 874-5 Support Products

Support products are those items used in support of services offered in SINs 1 through 4, 6, 7 and 99. They could include:

- Workbooks
- Additional copies of training manuals
- Slides
- CDs and DVDs
- Videotapes
- Assessment/survey instruments
- Satellite and Internet broadcast media

No administrative supplies shall be offered as support products.

### SIN 874-6 Competitive Sourcing Support

Contractors provide expert advice, consultation and assistance to federal organizations tasked with conducting OMB Circular A-76 Commercial Activities studies, strategic sourcing studies, privatization studies, public-private partnerships and other competitive sourcing projects or efforts including activities related to the Federal Activities Inventory Reform Act. Task orders may include, but are not limited to:

- Strategic, tactical and operational level planning support
- Initial study planning
- Development of Performance Work Statements (PWS)
- Development of in-house government cost estimates

- Development of Quality Assurance Surveillance Plans (QASP)
- Administrative appeal process support
- Comparison of in-house bids to proposed Inter-service Support Agreement (ISSA) prices
- Performance of management studies to determine the government's Most Efficient Organization (MEO)
- MEO or contract implementation support
- MEO performance reviews
- Assessments and/or studies of potential privatization initiatives
- Privatization
- Strategic sourcing

#### Did You Know?

Did you know that MOBIS contractors can conduct customer and employee satisfaction surveys?



## SIN 874-7 Program Integration and Project Management Services

Contractors provide services related to initiating, planning, controlling, executing and closing out projects & programs. Task Orders may include, but are not limited to:

- Project leadership and communications
- Scheduling and cost control
- Risk management
- Management of project quality
- Project scope management
- Program/project performance measurement
- Program integration
- Program/project documentation

## SIN 874-99 Introduction of New Service

May include a task, procedure or product existing in the commercial marketplace that is being developed, improved or has not yet been introduced to the federal government. Furthermore, it is not currently available under any GSA Schedule Contract and is categorically related to this procurement.

## MOBIS Services Available Under The Consolidated Products and Services Schedule!

GSA introduced the Consolidated Schedule to assist you with complex requirements that cross the boundaries of individual schedules. Consolidated contractors can offer their entire business line, including MOBIS related services, under a single contract number. This enables you to procure a total solution via a single task order. The Consolidated Schedule is structured so that each Schedule is represented by a single SIN. For example, MOBIS related services are available under C R499. Visit the Schedules e-Library at [www.gsa.gov/elibrary](http://www.gsa.gov/elibrary) and do a search on C R499 to view a list of Consolidated Schedule contractors who offer MOBIS related services.

# Conducting Your MOBIS Procurement



### Procurement Checklist

- Conduct Acquisition Planning and Market Research
- Consider Sources Sought/ Request For Information
- Determine Contract Arrangement
- Develop Your Statement of Work (SOW)
- Consider Contractor Teaming Arrangements and/or Blanket Purchase Agreements
- Develop Your Source Selection Criteria
- Distribute your RFQ in a manner that maximizes competition
- Evaluate Responses
- Select the Best Value Contractor and issue a Task Order

### Acquisition Planning and Market Research

As with any other acquisition, the process of issuing a MOBIS task order should begin with acquisition planning. Depending upon the complexity of the order and ordering agency policy, you may not need to prepare a written acquisition plan, but you should identify and address factors that impact your acquisition. Of course, the need for effective planning increases as the dollar value and complexity of the acquisition increase.

### e-Tools

GSA has developed several e-tools that facilitate **market research**. They include the MOBIS website, Schedules e-Library, *GSA Advantage*®, and e-Buy.

### MOBIS Website

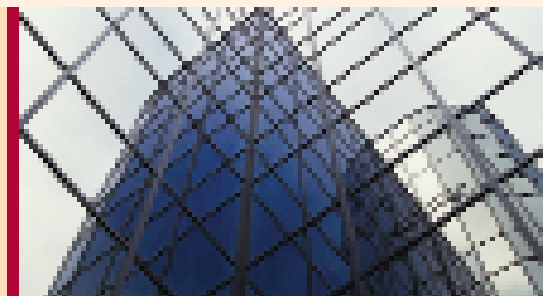
[www.gsa.gov/mobis](http://www.gsa.gov/mobis)

A wealth of information can be found on the MOBIS website:

- Answers to Frequently Asked Questions
- Points of Contact for MOBIS related inquiries
- A link to download the current MOBIS solicitation
- Links to Schedules e-Library, e-Buy and *GSA Advantage*®

### Tips:

1. FAR 8.4 governs GSA Schedule procurements; it can be accessed online at: <http://www.arnet.gov/far/>
2. Orders placed under a GSA Schedule contract are not exempt from the development of acquisition plans (see Subpart 7.1)
3. When selecting contract type consider:
  - Firm-fixed price
  - Labor-hour
  - Fixed price variations
    - Incentives
    - Award Fee
    - Award Term



## Schedules e-Library

[www.gsa.gov/elibrary](http://www.gsa.gov/elibrary)

Schedules e-Library is your source for GSA and VA Schedules contract award information. It is updated daily to provide you with the latest award information. Access the Schedules e-Library to:

- Review Schedule ordering guidelines
- View Schedule offerings using the Category Guide
- Download Schedule solicitations for easy reference
- View lists of GSA and VA Schedule contractors
- Search for Schedule contractors based on socio-economic business characteristics
- Sort lists of Schedule contractors by "City/State"
- Link to Schedule price lists posted in *GSA Advantage!*<sup>®</sup>



## Schedules e-Library Search Tip

Let's assume you're looking for a list of MOBIS contractors who meet the following criteria:

- Awarded SIN 874-1, Consulting Services
- Classified as both an 8(a) and women-owned business
- Located in the state of California

From the Schedules e-Library homepage:

1. Search on "874-1" and click on the resulting hyperlink
2. Select 8(a) and women-owned, then click on the "GO" button
3. Click on the "Sort By" hyperlink to list contractors by State

What initially seemed like a challenge was easy as 1-2-3!

## GSA Advantage!<sup>®</sup>

[www.gsaadvantage.gov](http://www.gsaadvantage.gov)

*GSA Advantage!*<sup>®</sup> is an electronic shopping and ordering system. It provides online access to several thousand contractors and millions of services and products. Access *GSA Advantage!*<sup>®</sup> to:

- View Schedule price lists of MOBIS contractors
- Conduct keyword searches to identify prospective contractors

## Online Training Available!

A comprehensive new training course titled, "Using GSA Schedules" is now available for federal agencies who use GSA Schedules at

<https://fsstraining.gsa.gov>

### Tips:

1. Before conducting your MOBIS procurement, download the MOBIS Solicitation using the link from the Schedules e-Library. This will ensure that you are aware of the basic contract terms and conditions.
2. A step-by-step tutorial is available on the e-Buy homepage.

## GSA Advantage!<sup>®</sup> Search Tip

If you want to identify contractors who can meet specific requirements, you should conduct keyword searches in *GSA Advantage!*<sup>®</sup> versus Schedules e-Library. *GSA Advantage!*<sup>®</sup> includes narrative provided by the contractor themselves, versus the standard Special Item Number descriptions that populate the e-Library.

## e-Buy

[www.ebuy.gsa.gov](http://www.ebuy.gsa.gov)

e-Buy is an online Request for Quotes (RFQ) tool, which enables federal buyers and Schedule contractors to exchange RFQ's and quotes electronically. You can also use e-Buy to conduct market research by posting Sources Sought or Requests for Information.

e-Buy is packed with features to make your next MOBIS procurement a snap!

## Market Research Features

- Direct links to Schedule contractor websites and their authorized prices.
- Ability to filter the list of MOBIS contractors by socio-economic characteristics
- Option to "Select All" contractors when posting a Sources Sought or Request for Information
- Historical record of all Sources Sought and/or Requests for Information issued via e-Buy

## Did You Know?

Did you know federal agencies have used the e-Buy tool to obtain a wide variety of MOBIS services?

- MOBIS contractors are currently:
- Assessing travel card programs
  - Supporting multiple Department of Defense Commercial Activities studies
  - Providing Program Integration and Management services to the US Navy and Department of Energy
  - Facilitating DoD focus groups
  - Performing modeling and simulation services
  - Conducting a federal healthcare market analysis for the Department of the Air Force
  - Providing facilitation services for an Army Integrated Process Team

## Procurement Features

- Maximizes competition and visibility of your RFQ among Schedule contractors
- Provides fair opportunity as required by Section 803 of the National Defense Authorization Act for 2002
- Flexibility to send your RFQ to Schedule contractors on different Schedules or Special Item Numbers
- Ability to post multiple attachments
- Vendors can submit a "No Quote" response, with a reason for not quoting
- Can be used to compete task orders against existing Schedule Blanket Purchase Agreements
- Historical record of all Schedule RFQs issued via e-Buy



# Developing Your Statement of Work (SOW)



The following section is excerpted from a training course currently available on the GSA website. The full course is titled, “Using GSA Schedules — Customers” and can be accessed at: <https://fsstraining.gsa.gov>

You will need to prepare a SOW when acquiring a service but not relying on the contractor’s commercial description to define the requirement. In this situation, purchasers are tailoring the commercial services performed by the contractor (e.g., program management services) to meet a particular Government need (e.g., management of a process improvement program).

### SOW Format

The SOW format and contents should be tailored to the requirement. If your agency does not prescribe a particular format, you might use the following template as a guide when developing a SOW for your MOBIS procurement.

- Background
- Scope
- Objectives
- Tasks
- Delivery
- Government-furnished property
- Security Requirement
- Place of performance
- Period of performance

### SOW Format: Background

Often identified as the “Introduction,” this section should provide information needed to acquaint the reader with the basic acquisition situation. The background information should:

- Identify the requirement in very general terms;
- Describe why the project is being pursued and how it relates to other projects;
- Summarize any statutory authority or regulations affecting the overall requirement; and
- Identify any background materials attached to the SOW.

### SOW Format: Scope

This section should provide a brief statement of what the Government expects to accomplish under the contract — the breadth and limitations of the contract effort. It should not include specific work tasks or a description of deliverable products.

### SOW Format: Objectives

This section should provide a concise overview of:

- The contract effort goals and objectives; and
- How the results or end products will be used.

### SOW Format: Tasks

Sometimes identified as “Requirements” or “Work Requirements,” this section defines the tasks that the contractor must complete during contract performance. The description of task requirements will depend on the approach that is selected to describe the required effort.

- For a Performance-Based Work Statement, this section should describe requirements in terms of results required rather than the methods for completing the work. This latitude will permit the contractor to develop new and innovative ways to complete those tasks.
- For a Level of Effort Statement of Work, this section should identify all tasks that must be performed and the hours to be devoted to each task.
- For a Detailed Statement of Work, this section should describe how the service must be accomplished. It may include precise measurements, tolerances, materials, quality control requirements, and other Government requirements that control the processes of the contractor.

This section must describe requirements in a way that permits contractor personnel to perform the service without direct Government supervision. Contractor personnel must not be subject to the type of supervision and control usually prevailing between the Government and its employees. For example, an SOW may permit the Government to approve key personnel, but must not permit the Government to approve all personnel performing the service. The SOW should also not include words that appear to indicate that the Government is managing day-to-day operations (e.g., “use methods directed by the **Contracting Officer’s Representative (COR)**”).

This section should:

- Specify requirements clearly so that all readers can understand them.
- Reference only the absolute minimum applicable specifications and standards needed.
- Tailor specifications and other documents.
- Separate general information from direction.

### SOW Format: Delivery

This section should clearly state:

- What the contractor must deliver. If different tasks have different delivery requirements, they must be clearly identified.
- When the contractor must deliver. This may be stated using actual dates, days after contract award, or using some other method that clearly marks the required delivery date.
- Where the contractor must deliver the service. This may be stated as a location, an organization, a person identified by position (e.g., Contracting Officer’s Representative, a person identified by name or using some other description).
- What documentation (if any) the contractor must obtain from the Government to verify Government receipt of the delivery.

### SOW Format: Government-Furnished Property

This section should identify any government-furnished property provided to the contractor. This includes all government-furnished property, such as government-furnished material, equipment, or information. If the list of property is extensive, this section should identify where that list can be found. Before offering to provide any property, make sure that it will be available when required, where required, and in the condition required by the contract. Failure to meet government-furnished property requirements often lead to a contractor claim for an equitable adjustment to contract price, delivery, or other requirements. Specific requirements about providing government-furnished property can be found in FAR 45, government property, and related agency policy.

### Tip:

Developing a Statement of Objective (SOO) can be a good alternative to writing a SOW. A SOO communicates your agency’s objective and/or required end-state. A SOO allows MOBIS contractors to respond with a SOW or Performance Work Statement that proposes an exact path and/or solution that will achieve your objective.

### Tip:

Where can I find Online Guidance for Preparing a Performance-Based Statement of Work?

Go to [www.gsa.gov/acquisitionpolicy](http://www.gsa.gov/acquisitionpolicy) and click on the Performance Based Contracting link to access guidance on Performance Based Contracting (PBC) regulations, samples and tutorials.





### SOW Format: Security Requirements

This section should identify any unique security requirements associated with contract performance (when applicable). These requirements may include, but are not limited to, such items as:

- Special pass or identification requirements;
- Special security clearance requirements; or
- Special escort requirements.

### SOW Format: Place of Performance

This section should identify where the contract will be performed. If performance will occur at multiple government locations, this section should indicate which tasks must be completed where. If performance will be at the contractor's facility, the SOW need only state that requirement.

### SOW Format: Period of Performance

The period of performance may be stated using actual dates, days after contract award, or using some other method. If different periods of performance will apply to different tasks, the tasks and related periods of performance should be clearly identified.

### SOW Language Tips

A variety of people with different perspectives and life experiences will read your SOW. Readers typically include government and industry contracting personnel, managers, technical experts, accountants and lawyers. All these readers need to understand the SOW in a clear and concise manner; therefore, language selection is very important.

Below are tips that you should consider when reviewing the SOW:

- Use simple words, phrases, and sentences whenever practical.
- Be concise, precise, and consistent. Keep sentences short and to the point. Normally the longer the sentence, the harder it is to understand.
- Use verbs in the active voice. A verb is in the active voice when it expresses an action performed by its subject. For example, "The contractor shall report contract progress quarterly."

- Avoid using verbs in the passive voice. A verb is in the passive voice when it expresses an action performed upon its subject or when the subject is the result of the action. For example, "Contract progress shall be reported quarterly by the contractor."
- Use "shall" or "must" when writing a requirement binding on the contractor. Avoid "should" or "may" because they leave the decision on appropriate action up to the contractor.
- Use "will" to indicate actions by the government.
- Be consistent when using terminology. Use the same word to mean the same thing throughout your SOW. Avoid using different words to indicate the same type of action.
- Avoid redundancy. At best, requiring the contractor to do the same thing in different parts of the SOW will add needless words to the SOW. At worst, there may be subtle differences in the requirements that will lead to a dispute during contract performance.
- Avoid vague or inexact phrases and generalizations.
- Avoid catchall and open-ended phrases, such as, "is common practice in the industry," "as directed," or "subject to approval." If you want to give the contractor an opportunity to use their standard commercial practices, require each offeror to identify its commercial practices in a proposal and then include that proposal as part of the order/contract.
- Define technical terms.
- Avoid using government jargon. Assure that it is clearly defined whenever jargon must be used.
- Only use "any," "either," "and/or," "etc." when allowing the contractor to select an alternative.
- Use abbreviations or acronyms only after spelling them out the first time they are used [e.g., National Aeronautics and Space Administration (NASA)]. Spell them out even if they are commonly used by the user's agency because a commercial contractor may not be familiar with them.
- Identify the date or version of any document referenced in your SOW.
- Advise readers from industry where they can obtain referenced documents.

# Drafting Your Request for Quotes (RFQ)



A Request for Quotes (RFQ) is a communication package that is developed by your contracting office. The goal of any RFQ is to provide prospective contractors with enough details to enable them to respond to your RFQ with viable, innovative and competitive quotes.

A typical RFQ includes:

- Statement of Work (Performance-Based is preferred)
- Evaluation Criteria, which communicate how the agency will identify the quote that represents the Best Value
- Special Instructions

Preparing Request for Quotes - Best Practices:

- Minimize contractor's costs associated with responding — only ask for what you need and will use in source selection
- Ensure the basis for selection is relevant to your requirement
- Use Oral Presentations or Proposals to streamline your evaluation process
- Consider including a preference for receipt of offers from small businesses

### A Note on Best Value

A Best Value determination is typically based on some combination of the following factors:

- Price
- Technical Solution
- Corporate Experience
- Past Performance
- Delivery

Your RFQ should request enough information to facilitate a "Best Value" decision and may require a contractor to provide, among other things:

- Resumes of key personnel proposed by the contractor
- Technical proposals to determine their understanding of the requirement
- Past performance to assess the firm's experience providing the required service
- Price and/or technical proposals from teams/partners in order to determine overall best value for the entire scope of work projected

Once your RFQ package is developed, it should be distributed to a selection of Schedule contractors according to Schedule ordering procedures.

### Tip: Evaluation Criteria

Once your RFQ establishes the basis for award, be sure to evaluate offers accordingly, failure to do so can result in a protest!

Check out "Legal Corner" on the GSA homepage to review recent case law regarding GSA Schedules.

[www.gsa.gov/schedules-legalcorner](http://www.gsa.gov/schedules-legalcorner)



# Ordering Procedures for Services



Specific ordering procedures to follow under the MOBIS schedule are provided under FAR Subpart 8.4:

## Orders up to the micro-purchase threshold (\$2.5K):

- Prepare a Statement of Work of your choice and place order directly with a contractor

## Orders over the micro-purchase threshold (\$2.5K):

To ensure a “Best Value” determination is made, as required by FAR 8.404:

- Prepare a Statement of Work
- Send Request For Quotes to at least three (3) Schedule contractors capable of performing the work
- Review the quotes received
- Select the contractor who provides your agency with the “Best Value” (considering price and other factors)
- Place order directly with contractor

## Orders exceeding the maximum order threshold (\$1M):

FAR 8.404(b)(3) provides guidelines for orders exceeding the maximum order threshold:

In addition to following the ordering procedures for orders above the micro-purchase threshold, ordering offices shall:

- Review additional Schedule contractors’ catalogs/price lists or use the *GSA Advantage*® online shopping service;
- Based upon the initial evaluation, seek price reductions from the Schedule contractor(s) appearing to provide the best value (considering price and other factors); and

- After price reductions have been sought, place the order with the Schedule contractor that provides the best value and results in the lowest overall cost alternative [see 8.404(a)]. If further price reductions are not offered, an order may still be placed, if the ordering office determines that it is appropriate.

## Section 803 of the National Defense Authorization Act for 2002

The Department of Defense (DoD) has implemented new rules for ordering services over \$100,000 under multiple award contracts. The rules are derived from Section 803 of the National Defense Authorization Act for 2002.

All schedule contractors are registered both on the Central Contractor Registration (CCR) system, [www.ccr.gov](http://www.ccr.gov) and on the Online Representations and Certifications Application (ORCA) system, <http://orca.bpn.gov>.

### Tips:

#### 1. Coding Your MOBIS Procurement

Use North American Industry Classification System (NAICS) code 541611 in conjunction with an applicable Federal Supply Classification (FSC) code to code your MOBIS procurement.

GSA has determined that this NAIC is appropriate for the majority of MOBIS task orders.

2. The Maximum Order Threshold does not prevent you from issuing a MOBIS task order over \$1M. If your task order exceeds \$1M, then GSA encourages you to pursue additional price discounts based on the volume of your order.

3. Posting your Schedule RFQ on e-Buy complies with the fair opportunity requirement of Section 803 of the National Defense Authorization Act for 2002.

4. DoD offices and non-DoD activities placing orders on behalf of DoD should refer to DFARS 208.404-70 for additional guidance regarding Section 803 of the National Defense Authorization Act for 2002.

<http://www.acq.osd.mil/dp/dars/dfars.html>

Section 803 requires the DoD, and entities contracting on behalf of the DoD, to contact substantially more sources than GSA Schedule policy currently states. GSA FSS policy requires that contracting officers (CO) contact at least three Schedule holders capable of performing the work. Section 803 requires the CO to contact as many Schedule holders as practicable in order to ensure that at least three responses are received. If three responses are not received, the CO must determine that additional qualified contractors could not be identified despite reasonable efforts to do so.

Good market research is the key to ensuring all practicable offerors have been extended a fair opportunity to participate in your acquisition. As with most rules, there are exceptions:

1. Unusual urgency
2. Only one source can respond due to unique or specialized nature of the work
3. New work is logical follow-on under the same contract
4. Must be placed to satisfy a minimum guarantee

**Contacting all Schedule holders that offer the required work satisfies the requirements of Section 803 because you have informed them of the opportunity for award.**

## MOBIS Task Orders

MOBIS task orders typically include the following information:

- GSA Schedule Contract number
- Statement of Work
- Labor Categories
- Labor Rates

- Delivery Times
- Travel Per Diem (when required)
- Materials
- Open Market Items (clearly labeled as such)
- Invoicing and Payment Information

Tips for preparing your MOBIS task order:

- For administrative convenience, non-contract items may be added to your task order if the items are clearly labeled as such and applicable acquisition regulations have been followed
- You may include additional clauses at the task order level as long as they do not change the terms and condition of the MOBIS solicitation
- You may issue task orders with option periods

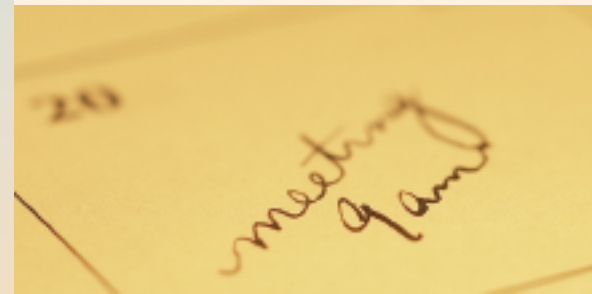
## Blanket Purchase Agreements

Blanket Purchase Agreements (BPAs) are a simplified method of filling anticipated repetitive needs for services and products. BPAs are “charge accounts” that ordering offices establish with GSA Schedule contractors to provide themselves with an easy ordering tool. In accordance with Federal Acquisition Regulation (FAR) 8.404, ordering offices may establish BPAs under any GSA Schedule contract.

## Benefits and Advantages of Using BPAs

BPAs eliminate contracting and open market costs related to the search for sources, the need to prepare solicitations, and the requirement to synopsise the acquisition. BPAs also:

- Satisfy recurring requirements
- Reduce acquisition costs through quantity discounts



# Success Story

## Marine Corps' Commercial Enterprise Omnibus support services (CEOss) program \$3B indefinite-delivery/indefinite quantity (IDIQ) contract

The Marine Corps Systems Command (MCSC) Acquisition Center for Support Services (ACSS) is responsible for developing, implementing, and executing a comprehensive Advisory and Assistance Services (A&AS) program for the MCSC. The ACSS is a consolidated office that functions independently to:

- ★ Coordinate MCSC requirements
- ★ Establish contractual relationships
- ★ Provide analytical and procurement planning services
- ★ Interface with the professional services sector
- ★ Ensure appropriate regulatory compliance

After considerable market research and multiple sessions with contractors, GSA and Marine Corps customers, the ACSS determined that GSA Schedules would provide MARCORSYSCOM with access to highly capable commercial suppliers and an efficient contract mechanism to meet their recurring needs.

The MCSC envisioned that the bulk of their requirements could be organized into four core areas:

- ★ Engineering and Scientific
- ★ Acquisition, Logistics & Administration
- ★ Business and Analytical
- ★ Specialty Engineering

After reviewing GSA's Schedule program, they identified eight Schedules that would enable the MCSC to address their core requirements:

- ★ Mission Oriented Business Integrated Services (MOBIS)
- ★ Logistics Worldwide (LOGWORLD)
- ★ Training Services
- ★ Financial, Accounting Business Services (FABS)
- ★ Laboratory Testing & Analysis
- ★ Environmental Services
- ★ Information Technology (IT) Services and Support
- ★ Professional Engineering Services (PES)

The Marine Corps assessed 120 GSA Schedule contractors and trimmed the list to a more manageable group. Vendors were then incentivized to team in a manner that would enable them to support the scope of requirements likely to emerge. The ACSS proceeded to award multiple Blanket Purchase Agreements to contractor teams that emerged as Best Value professional service providers.

The BPAs provide for a wide range of diverse engineering, configuration/data management, administrative support, security management, acquisition management, test and evaluation, acquisition logistics, and financial management support. The GSA contractors under these BPAs support critical weapon systems and processes for the Marine Corps such as Combat Equipment Support Systems, Transportation/Engineering Systems, Armor and Fire Support, Infantry Weapons Systems, Battle Management and Air Defense, and Information Systems & Infrastructure.

The CEOss program supports a customer base of approximately 1,000 personnel and enables 8 full-time contract specialists to obligate more than \$120M annually. The business model includes a web-enabled procurement portal, which allows the Marine Corps to develop performance based requirements, generate independent government cost estimates, manage competition within the respective domains, award task orders within 20 days of initiation and receive/certify/disburse payments for CEOss invoices. The procurement portal also allows the ACSS to generate CEOss performance metrics for briefings to management.

The ACSS has adopted an innovative business model that supports a wide array of mission critical weapon systems. The model utilizes e-commerce and GSA Schedules in a manner that could be emulated by other system acquisition centers with great success.

"Prior to using GSA Schedule, our timeframe for issuing a task order, completing the procurement package, and going through a competitive award easily exceeded 30 days, and often double that time. Now, our average completion time is just 17 days, and the process is much more collaborative."

- Mr. Mark Hoyland Director, Acquisition Center for Support Services (ACSS)  
Marine Corps Systems Command

- Save time by eliminating repetitive, individual purchases and payments
- Reduce administrative efforts and paperwork
- Obtain better value by leveraging your buying power through volume purchasing
- Enable you to use streamlined ordering procedures with no dollar limitations on individual task/delivery orders
- Permit you to incorporate Contractor Team Arrangements for total solutions
- Allow for quicker turnarounds on orders
- Permit you to incorporate terms and conditions not in conflict with the underlying contract

A BPA can be set up for your field offices across the nation to use, thus allowing them to participate in your BPA and place orders directly with GSA Schedule contractors. In doing so, your entire agency reaps the benefits of additional discounts negotiated into your BPA. The flexibility and advantages are endless when you set up a BPA.

### Setting Up Your BPA

BPAs are established directly with GSA Schedule contractors. In accordance with FAR 8.404, you may request a price reduction based on the total estimated volume of the BPA, regardless of the size of individual orders. Your Request For Quotes (RFQ) should specify your requirements, including estimated quantities and work to be performed, and should advise GSA Schedule contractors whether you intend to establish a single BPA or multiple BPAs.

Generally, a single BPA should be established when you can easily define your services and/or products requirements and a firm-fixed price or ceiling price can be established. Since a best value selection is made when the single BPA is established, you do not need to make a separate best value selection for each order under the BPA.

Multiple BPAs should be established when you cannot easily define your services and/or products requirements, or you determine that more than one BPA is needed to meet your needs. First determine which GSA Schedule contractors are technically qualified and then establish BPAs with them. When multiple BPAs are established, each order must be competed among all BPA holders and a best value selection must be made each time an order is placed.

BPAs must contain certain information, such as:

- Name of the GSA Schedule contractor
- GSA Schedule contract number
- Agency assigned BPA number
- A description of the requirement, to include estimated quantities and work to be performed
- Prices and/or discounts

### Tip:

Review BPAs annually to ensure the BPA still represents Best Value!



- The extent of the obligation
- Any additional price reductions negotiated by the ordering office, based on the proposed dollar value of the BPA
- A listing of individuals authorized to purchase under the BPA
- Delivery or performance time frames
- Location of deliveries
- Frequency of ordering and invoicing
- Date BPA expires
- A statement that all other terms and conditions are contained in the underlying GSA Schedule contract

### Total Solutions through Contractor Teaming Arrangements

For complex tasks, Contractor Teaming Arrangements may be desirable from both a Government and industry perspective. A Contractor Teaming Arrangement allows two or more GSA Schedule contractors to work together to meet agency requirements, allowing them to compete for orders for which they may not qualify independently. Contractors on the same schedule or across multiple schedules can team. By using Teaming Arrangements, contractors can complement each other's unique capabilities while offering Government agencies the best turnkey solutions based on a combination of performance, cost and delivery of acquired services. You can benefit from using Contractor Teaming Arrangements by buying a solution rather than making separate buys from various contractors. See FAR 9.6 for more information or visit [www.gsa.gov/schedules](http://www.gsa.gov/schedules).

### Small Business Means Big Business

The General Services Administration and the Small Business Administration (SBA) strongly support the participation of small business concerns in the Multiple Award Schedules program. To enhance small business participation, SBA policy requires agencies to include in their procurement base and goals the dollar value of orders expected to be placed against the Multiple Award Schedules, and to report accomplishments against these goals. For more details, please visit [www.sba.gov](http://www.sba.gov).

The GSA Schedules e-Library website contains information on business size and socio-economic status. This information should be used as a tool to assist ordering activities in meeting or exceeding established small business goals. By utilizing the information found on this website, you are also encouraged to consider small, small disadvantaged, 8(a) firms, veteran owned, disabled veteran owned and women-owned small businesses when making a best value determination. To visit GSA Schedules e-Library, go to [www.gsa.gov/elibrary](http://www.gsa.gov/elibrary)

### An Extra Tool for Your Acquisition Toolbox - GSA-Managed Acquisitions

Whether you decide to conduct your own procurement or have us do some or all of it for you (GSA-Managed Acquisition), GSA is here to help. Through GSA's Office of Professional Services you can get the level of assistance you need on a cost-reimbursable basis in the areas of acquisition management, project management, procurement support, and financial management for IT and specific professional services from GSA Schedules, including the **MOBIS** Schedule. We've already covered the benefits of doing the

procurement yourself; so let's take a look at your other option – GSA-Managed Acquisitions through GSA's Office of Professional Services.

In a GSA-Managed Acquisition, you can meet your requirements by using specific elements of GSA support, or by outsourcing the entire project for a turnkey solution. GSA works with you to understand your requirements and helps you choose, implement and manage the acquisition for the best solutions to meet your needs. You define the project and the budget; GSA does the rest, freeing up your valuable resources for other tasks.

Benefits of GSA-Managed Acquisitions include:

- Acquisition Expertise: GSA professionals will work with you to define your requirements, write statements of work, perform market surveys, develop acquisition strategies, run technical evaluation boards, evaluate "best value," and award task orders.
- Professional Project Management: GSA professionals will manage the project after award to oversee scheduling and deliverables, accounts payable and financial oversight, all while keeping costs in check!
- Back-Up Support: Even if you don't need a total turnkey solution, you can still turn to GSA-Managed Acquisitions for support. Use GSA resources to complement your agency's contracting capabilities on an "as needed" basis.

Look to GSA-Managed Acquisitions to decrease your agency's procurement costs and risk and increase your agency's effectiveness in achieving its goals. GSA professionals will deliver your project on time and on budget. For assisted acquisition services, contact the Office of Professional Services at (703) 306-6140, -6100 or visit [www.gsa.gov/professionalservicesoffice](http://www.gsa.gov/professionalservicesoffice).



## Success Story

### GSA Office of Professional Services awards Blanket Purchase Agreements for Engineering Field Activity Northwest (EFA-NW)

In April 2004, GSA Office of Professional Services awarded the first task order under a multiple Blanket Purchase Agreement (BPA) established on behalf of EFA-NW, a division of the Naval Facilities Engineering Command (NAVFAC). The BPAs were awarded to three Mission Oriented Business Integrated Services (MOBIS) contractors to provide EFA-NW with analytical and consulting services over a three-year period.

The BPA holders will provide analytical support, consulting, strategic planning and documentation for utilities/energy engineering and facilities support contracts. The preponderance of work involves developing Performance Work Statements (PWS) and cost estimates for facility support contracts. As EFA-NW identifies future requirements, GSA will compete those requirements among the three BPA holders to ensure that the contractor with the best possible combination of pricing and technical capabilities performs a particular task.

The GSA pre-award support team included both a Project Manager and a Contracting Officer. The total time that elapsed from initial discussions with EFA-NW to award of the three BPAs was just under two months. During that time period, GSA provided the following services to facilitate the procurement:

- ★ Developed a Statement of Work
- ★ Prepared and distributed the RFQ package to 66 prospective contractors
- ★ Assisted with the evaluation of 11 quotes
- ★ Documented and awarded three BPAs

During the post-award period, a GSA Contracting Officer will compete individual task orders among the three BPA holders, provide contract administration support related to processing and paying invoices as well as executing modifications to the underlying Blanket Purchase Agreements. Daily project management will be handled by an EFA-NW Project Manager who has been delegated the role of Contracting Officer's Representative (COR).

To learn more about GSA assisted services, please contact the Office of Professional Services, at 703-306-6140 or visit [www.gsa.gov/professionalservicesoffice](http://www.gsa.gov/professionalservicesoffice). For additional information on the MOBIS Schedule, please contact the Management Services Center at 1-800-241-RAIN (7246) or via email at [mobis@gsa.gov](mailto:mobis@gsa.gov).

# Points of Contact and Frequently Asked Questions

## Points of Contact

### For Further Assistance:

General Services Administration  
Management Services Center  
400 15th Street SW, Room 2757  
Auburn, WA

1-800-241-RAIN (7246) or [mobis@gsa.gov](mailto:mobis@gsa.gov)

You may also contact your local GSA representative for assistance. Visit [www.gsa.gov/csd](http://www.gsa.gov/csd) to review comprehensive contact information by state or global region.

### Need More Schedules?

To request additional copies of this schedule, contact:

General Services Administration  
Centralized Mailing List Service (7FM-CMLS)  
501 Felix Street  
PO Box 6477  
Ft. Worth, TX 76115  
(817) 334-5215  
FAX: (817) 334-5227  
[cmls@gsa.gov](mailto:cmls@gsa.gov)

## Frequently Asked Questions

### Question: Do I place task orders through GSA?

**Answer:** The majority of ordering offices place task orders directly with the best value MOBIS contractor and are responsible for administration of the task order. The contractor submits invoices directly to the ordering office. Contractor payments are issued to the contractor in accordance with the Prompt Payment Act.

Agencies can also elect to utilize fee for service contracting support offered by GSA's Office of Professional Services. This office can accept funding documents and competitively procure professional services from MOBIS contractors. Services might include preparing a Performance Based Statement of Work, conducting market research, developing/distributing a Request for Quotes (RFQ), evaluating quotes

received and issuing/administering the MOBIS task order. For additional information, please contact the Management Services Center at [mobis@gsa.gov](mailto:mobis@gsa.gov) or 1-800-241-RAIN (7246).

### Question: How do federal agencies use MOBIS?

**Answer:** Civilian agencies distribute a Request for Quote (RFQ) to a minimum of three (3) MOBIS contractors. An RFQ typically includes instructions; evaluation criteria and a performance based Statement of Work (SOW). The SOW communicates what work will be performed, period and place of performance, deliverable schedules, applicable standards, special requirements (security clearances, travel), etc. After the RFQ closes, the ordering office evaluates the quotes received, makes a best value decision and issues a task order.

GSA offers a comprehensive training course, titled, "Using GSA Schedules" which covers schedule ordering procedures, developing Statements of Work, Contractor Teaming Arrangements, Blanket Purchase Agreements and other Schedule related topics. For additional information, go to <https://fsstraining.gsa.gov>.

### Question: Where do I look for guidance on writing a Performance Based Statement of Work under MOBIS?

**Answer:** For performance based contracting regulations, samples, tutorials and guidance, go to [www.gsa.gov/performancebasedcontracting](http://www.gsa.gov/performancebasedcontracting).

### Question: How do I get a current list of MOBIS contractors?

**Answer:** Visit the Schedules e-Library at [www.gsa.gov/elibrary](http://www.gsa.gov/elibrary) and do a search on MOBIS. Click on 874, read through the Special Item Number (SIN) descriptions and click on the SIN that captures the scope of your requirement. For example, if you were looking for a contractor to design and implement a telephone survey, then you would click on 874 3. The next screen offers a list of MOBIS contractors awarded under 874 3. This list can be sorted by business type and contractor location. If a particular contractor

catches your eye, you should be able to link directly to the contractor's MOBIS price list in *GSA Advantage!*® by clicking on "yes-view order".

You may also access e-Buy (our new tool for posting Schedule RFQs, RFIs and Sources Sought notices) at [www.ebuy.gsa.gov](http://www.ebuy.gsa.gov). You'll need to log in, (using your *GSA Advantage!*® password...if you don't already have one, it's easy to get one...you can hyperlink to the form from the e-Buy homepage. After logging in, click on prepare an RFQ and then do a search on 874. After the next page comes up, click on the appropriate MOBIS SIN and you'll find a list of MOBIS contractors. To the far right are "text files". If you double click on any of them, you should be able to view pricing and other information about the contractor.

**Question: How can I refine my search to a manageable list of MOBIS contractors?**

**Answer:** Go to [www.gsaadvantage.gov](http://www.gsaadvantage.gov) and conduct a search using key words that describe your requirement. Try the following steps to refine your search results:

1. Type in key word(s) in the box under "What are you looking for?".
2. Click on "Find It".
3. On the next page, refine your search by searching within results with a keyword, then click on "Find It"
4. We recommend that you continue to search within results until you get to a more manageable list of MOBIS contractors.

You can also prepare a Sources Sought or Request for Information (RFI) notice to solicit responses from MOBIS contractors. You can post such a notice on the FedBizOpps website ([www.fedbizopps.gov](http://www.fedbizopps.gov)) or on e-Buy ([www.ebuy.gsa.gov](http://www.ebuy.gsa.gov)). The RFI option is especially useful when you require industry comment on a draft Statement of Work.

**Question: Where can I find information regarding past performance of MOBIS contractors?**

**Answer:** You can request past performance information in your RFQ (Request For Quotes). Alternatively, this information can be obtained by distributing a Sources Sought or an RFI (Request for Information) to MOBIS Schedule contractors.

In addition, federal agencies (CO's and source selection officials) can access past performance data at <http://www.ppirs.gov/> after submitting a membership request that is approved by group owners/managers of the PPIRS data. Keep in mind, however, that this past performance information will not specifically relate to a contractor's performance under the MOBIS contract.

**Question: Can I issue MOBIS RFQs electronically?**

**Answer:** Federal agencies can use e-Buy to prepare and distribute MOBIS RFQs. Once an RFQ closes, the agency will be able to review quotes submitted by schedule contractors. The actual award of a task order must be completed outside of e-Buy unless the total dollar value of the task order is less than \$2,500. e-Buy is web-based and accessible at [www.ebuy.gsa.gov](http://www.ebuy.gsa.gov). An excellent tutorial is available on the e-Buy homepage.

**Question: Can I issue task orders electronically?**

**Answer:** Yes, the Federal Acquisition Streamlining Act (FASA) of 1994 established the Federal Acquisition Computer Network (FACNET) which realigned the federal acquisition process from one driven by paperwork into an expedited process based on electronic commerce/electronic data interchange (EC/EDI).

**Question: Are consulting projects related to Information Technology authorized under MOBIS?**

**Answer:** Yes, if these projects are Mission Oriented Business Integrated initiatives. Please note that Schedule 70, General Purpose Commercial Information Technology Equipment, Software and Services may also meet your needs.

**Question: Am I authorized to include FAR clauses on MOBIS Task Orders?**

**Answer:** Yes, with the caveat that you cannot change the terms and conditions of the MOBIS contract. You may download the MOBIS Solicitation from [www.gsa.gov/mobis](http://www.gsa.gov/mobis). Click on the link to the solicitation.

**Question: Can I issue MOBIS task orders with option periods?**

**Answer:** Yes, however, please ensure that your task order indicates you will exercise your task order option pending confirmation that GSA has exercised the contractor's MOBIS option period. For example, you've awarded a task order with four 1-year option periods and the best value MOBIS contractor's base period expires just prior to the 2nd option period of your task order. This means that you will not be able to exercise your 2nd option period until you confirm that GSA has exercised the MOBIS contractor's 1st option period.

**Question: How do I handle Other Direct Costs (ODC) at the task order level?**

**Answer:** For administrative convenience, non-contract items may be added to the GSA Schedule BPA or the individual task order if the items are clearly labeled as such, applicable acquisition regulations have been followed, and price reasonableness has been determined for the items. The MOBIS solicitation offers specific instruction as relates to transportation and per diem costs billed by the contractor:

Costs incurred for transportation and per diem (lodging, meals and incidental expenses) will be billed in accordance with the regulatory implementation of Public Law 99-234, FAR 31.205-46 Travel Costs, and the contractor's cost accounting system. These costs are directly reimbursable by the ordering agency.

- (a) The contractor shall notify the ordering agency, in writing, of the requirement for reimbursement of transportation and per diem expenses, prior to acceptance of the order. This notification shall include a "not to exceed" estimate of these proposed costs. Any applicable indirect costs associated with the transportation and per diem expenses will be charged at a rate negotiated prior to the using agency's delivery order. Contractors shall be reimbursed only for incurred costs at or below the "not to exceed."

- (b) Costs for transportation, lodging, meals, and incidental expenses incurred by contractor personnel on official company business are allowable subject to the limitations contained in FAR 31.205-46, Travel Costs.
- (c) Reimbursements for costs that are not specified in this solicitation, or in any contract or task order resulting from this solicitation, are not allowed. It is GSA policy NOT to allow a charge of profit or fee on reimbursable items.

**Question: Can I include incentives at the task order level?**

**Answer:** The MOBIS solicitation specifically authorizes the use of incentives at the task order level. The text of clause I-FSS-60 PERFORMANCE INCENTIVES (APRIL 2000) (TAILORED) is provided below:

- (a) When using a performance-based statement of work, performance incentives may be agreed upon between the contractor and the ordering office on individual fixed price orders or Blanket Purchase Agreements, for fixed price tasks, under this contract in accordance with this clause.
- (b) The ordering office must establish a maximum performance incentive price for these services and/or total solutions on individual orders or Blanket Purchase Agreements.
- (c) To the maximum extent practicable, ordering offices shall consider establishing incentives where performance is critical to the agency's mission and incentives are likely to motivate the contractor. Incentives shall be based on objectively measurable tasks.
- (d) The above procedures do not apply to labor hour orders.

**Question: When should I seek a price reduction from a MOBIS contractor?**

**Answer:** Anytime! When the scope and/or anticipated dollar value of your order clearly indicates the potential for obtaining a reduced price. Please refer to clauses 52.216-19 Order Limitations and I-FSS-125 Requirements Exceeding the Maximum Order (SEP 1999).

**Question:** Could you clarify the meaning of the maximum order threshold?

**Answer:** GSA asserts that labor hour pricing up to this threshold is fair and reasonable. However, when the estimated value of your task order exceeds the maximum order threshold you are encouraged to pursue additional price discounts based on the volume of your order. Please note, this is not a GSA enforced limit on the value of your task order. [See I-FSS-125 Requirements Exceeding the Maximum Order (SEP 1999)].

**Question:** Can I terminate a MOBIS task order?

**Answer:** Yes, you may terminate for cause or convenience. Please refer to clause 52.212-4, Contract Terms and Conditions in the MOBIS solicitation.

**Question:** Since GSA has no direct access to an agency's task orders, what mechanism does GSA have to ensure contractors are accurately reporting their MOBIS task orders?

**Answer:** GSA has a staff of Industrial Operation Analysts who audit sales reported by Schedule contractors.

**Question:** What about organizational conflicts of interest?

**Answer:** To avoid an organizational or financial conflict of interest and to avoid prejudicing the best interests of the government, ordering offices may place restrictions on the contractors, its affiliates, chief executives, directors, subsidiaries and subcontractors at any tier when placing orders against Schedule contracts. Such restrictions shall be consistent with FAR 9.505 and shall be designed to avoid, neutralize, or mitigate organizational conflicts of interest that might otherwise exist in situations related to individual orders placed against the Schedule contract. Examples of situations, which may require restrictions, are provided at FAR 9.508.

# Detailed Information About Ordering From Schedules

## Special ordering procedures for services that require a Statement of Work

FAR 8.402 contemplates that GSA may occasionally find it necessary to establish special ordering procedures for individual GSA Schedules or for some Special Item Numbers (SINs) within a Schedule. GSA has established special ordering procedures for services that require a Statement of Work. These special ordering procedures take precedence over the procedures in FAR 8.404 (b)(2) through (b)(3).

When ordering services over \$100,000, Department of Defense (DoD) ordering offices and non-DoD agencies placing orders on behalf of DoD must follow the policies and procedures in the Defense Federal Acquisition Regulation Supplement (DFARS) 208.404-70 — Additional ordering procedures for services. When DFARS 208.404-70 is applicable and there is a conflict between the ordering procedures contained in this clause and the additional ordering procedures for services in DFARS 208.404-70, the DFARS procedures take precedence.

GSA has determined that the prices for services contained in the contractor's price list applicable to this Schedule are fair and reasonable. However, the ordering office using this contract is responsible for considering the level of effort and mix of labor proposed to perform a specific task being ordered and for making a determination that the total firm-fixed price or ceiling price is fair and reasonable.

When ordering services, ordering offices shall-

Prepare a Request for Quote or other communication tool:

- ★ A statement of work (a performance-based statement of work is preferred) that outlines, at a minimum, the work to be performed, location of work, period of performance, deliverable schedule, applicable standards, acceptance criteria, and any special requirements (i.e., security clearances, travel, special knowledge, etc.) should be prepared.
- ★ The request should include the statement of work and request the contractors to submit either a firm-fixed price or a ceiling price to provide the services outlined in the statement of

work. A firm-fixed price order shall be requested, unless the ordering office makes a determination that it is not possible at the time of placing the order to estimate accurately the extent or duration of the work or to anticipate cost with any reasonable degree of confidence. When such a determination is made, a labor hour or time-and-materials quote may be requested. The firm-fixed price shall be based on the prices in the schedule contract and shall consider the mix of labor categories and level of effort required to perform the services described in the statement of work. The firm-fixed price of the order should also include any travel costs or other direct charges related to performance of the services ordered, unless the order provides for reimbursement of travel costs at the rates provided in the Federal Travel or Joint Travel Regulations. A ceiling price must be established for labor-hour and time-and-materials orders.

- ★ The request may ask the contractors, if necessary or appropriate, to submit a project plan for performing the task, and information on the contractor's experience and/or past performance performing similar tasks.
- ★ The request shall notify the contractors what basis will be used for selecting the contractor to receive the order. The notice shall include the basis for determining whether the contractors are technically qualified and provide an explanation regarding the intended use of any experience and/or past performance information in determining technical qualification of responses.

Transmit the Request to Contractors:

- ★ Based upon an initial evaluation of catalogs and price lists, the ordering office should identify the contractors that appear to offer the best value (considering the scope of services offered, pricing and other factors such as contractors' locations, as appropriate) and transmit the request as follows:
- ★ The request shall be provided to at least three (3) contractors if the proposed order is estimated to exceed the micro-purchase



threshold, but not exceed the maximum order threshold.

- ★ For proposed orders exceeding the maximum order threshold, the request shall be provided to an appropriate number of additional contractors that offer services that will meet the agency's needs.
- ★ In addition, the request shall be provided to any contractor who specifically requests a copy of the request for the proposed order.
- ★ Ordering offices should strive to minimize the contractors' costs associated with responding to requests for quotes for specific orders. Requests should be tailored to the minimum level necessary for adequate evaluation and selection for order placement. Oral presentations should be considered, when possible.

**Evaluate Responses and Select the Contractor to Receive the Order:**

- ★ After responses have been evaluated against the factors identified in the request, the order should be placed with the Schedule contractor that represents the best value. (See FAR 8.404)

The establishment of GSA Schedule Blanket Purchase Agreements (BPAs) for recurring services is permitted when the procedures outlined herein are followed. All BPAs for services must define the services that may be ordered under the BPA, along with delivery or performance time frames, billing procedures, etc. The potential volume of orders under BPAs, regardless of the size of individual orders, may offer the ordering office the opportunity to secure volume discounts. When establishing BPAs ordering offices shall-

- ★ Inform contractors in the request (based on the agency's requirement) if a single BPA or multiple BPAs will be established, and indicate the basis that will be used for selecting the contractors to be awarded the BPAs.

**SINGLE BPA:** Generally, a single BPA should be established when the ordering office can define the tasks to be ordered under the BPA and establish a firm-fixed price or ceiling price for individual tasks or services to be ordered. When this occurs, authorized users may place the order directly under the established BPA when the need for service arises. The schedule contractor that represents the best value should be awarded the BPA. (See FAR 8.404)

**MULTIPLE BPAs:** When the ordering office determines multiple BPAs are needed to meet its requirements, the ordering office should determine which contractors can meet any technical qualifications before establishing the BPAs. When establishing multiple BPAs, the procedures in the section titled, "Transmit the Request to Contractors" must be followed. The procedures in the section titled, "Transmit the Request to Contractors" do not apply to orders issued under multiple BPAs. Authorized users must transmit the request for quote for an order to all BPA holders and then place the order with the BPA holder that represents the best value.

- ★ Review BPAs Periodically: Such reviews shall be conducted at least annually. The purpose of the review is to determine whether the BPA still represents the best value. (See FAR 8.404)

The ordering office should give preference to small business concerns when two or more contractors can provide the services at the same firm-fixed price or ceiling price.

When the ordering office's requirement involves both products as well as executive, administrative and/or professional, services, the ordering office should total the prices for the products and the firm-fixed price for the services and select the contractor that represents the best value. (See FAR 8.404)

The ordering office, at a minimum, should document orders by identifying the contractor from which the services were purchased, the services purchased, and the amount paid. If other than a firm-fixed price order is placed, such documentation should include the basis for the determination to use a labor-hour or time-and-materials order. For agency requirements in excess of the micro-purchase threshold, the order file should document the evaluation of Schedule contractors' quotes that formed the basis for the selection of the contractor that received the order and the rationale for any trade-offs made in making the selection.

# Sample BPA Form

The following is a Suggested Format for customers to consider when using this purchasing tool.

BPA NUMBER \_\_\_\_\_

**(CUSTOMER NAME)  
BLANKET PURCHASE AGREEMENT**

Pursuant to GSA Federal Supply contract number(s) \_\_\_\_\_, Blanket Purchase Agreements, the Contractor agrees to the following terms of a Blanket Purchase Agreement (BPA) EXCLUSIVELY WITH (Ordering Agency)

1. The following contract items can be ordered under this BPA. All orders placed against this BPA are subject to the terms and conditions of the contract, except as noted below:

<b>SPECIAL ITEM NUMBER</b>	<b>*SPECIAL BPA DISCOUNT/PRICE</b>
_____	_____
_____	_____

2. Delivery:

<b>DESTINATION</b>	<b>DELIVERY SCHEDULE/DATES</b>
_____	_____
_____	_____

3. The Government estimates, but does not guarantee, that the volume of purchases through this agreement will be \_\_\_\_\_

4. This BPA does not obligate any funds

5. This BPA expires on \_\_\_\_\_ or at the end of the contract period, whichever is earlier

6. The following office(s) is hereby authorized to place orders under this BPA

<b>OFFICE</b>	<b>POINT OF CONTACT</b>
_____	_____
_____	_____

7. Orders will be placed against this BPA via Electronic Data Interchange (EDI), FAX or paper.

8. Unless otherwise agreed to, delivery tickets or sales slips containing the following information as a minimum must accompany all deliveries under this BPA:

- a) Name of contractor
- b) Contract number
- c) BPA number
- d) Special Item number
- e) Task/Delivery order number
- f) Date of purchase
- g) Quantity, unit price, and extension of each item (unit prices and extensions need not be shown when incompatible with the use of automated systems; provided, that the invoice is itemized to show the information); and
- h) Date of shipment

9. The requirements of a proper invoice are as specified in the GSA Schedule contract. Invoices will be submitted to the address specified within the task/delivery order transmission issued against this BPA.

10. The terms and conditions included in this BPA apply to all purchases made pursuant to it. In the event of an inconsistency between the provisions of this BPA and the Contractor's invoice, the provisions of this BPA will take precedence.

**\*IMPORTANT** - A new feature to the GSA Schedules Program permits contractors to offer price reductions in accordance with commercial practice. Contractor Team Arrangements are permitted with GSA Schedule contractors in accordance with FAR Subpart 9.6.





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