

Services Ordering Solutions: Avoiding MAS Confusion

Using GSA Multiple Award Schedules for Professional Services

Episode #2

Scope and Market Research for Schedule Orders

Recorded: October and November 2007

**Presented by: Dave Clemens & Brad Powers with Special MOBIS Guest
Kathe Sewell**

2.1. Introduction

2.2. Myth Busters

“Schedule contractors are the best judge as to what Schedule/SIN are most appropriate for my task...[or, another variation]..Schedule/SIN decisions for my task order are really a matter between the GSA Schedule contract’s PCO and the contractor.”

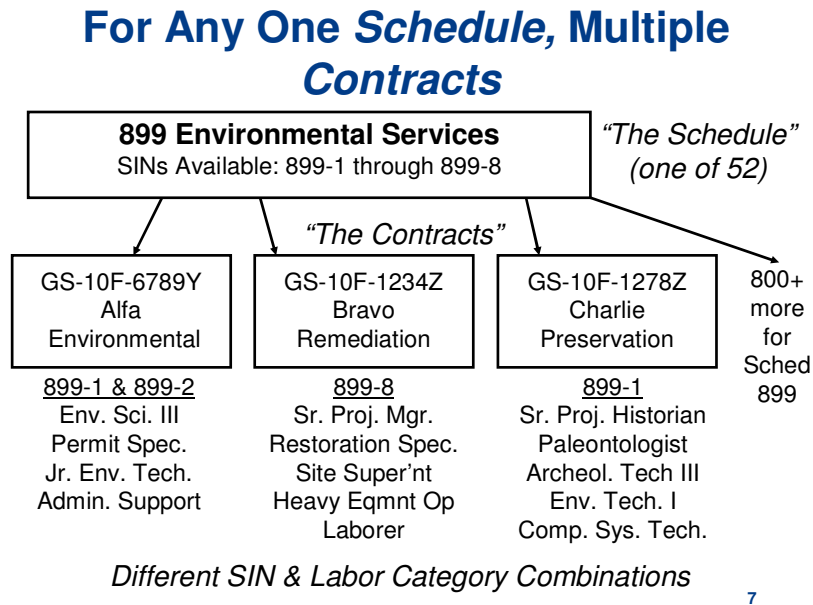
Wrong. The Ordering Officer is ultimately responsible for scope determinations on Schedule task orders. A contractor’s willingness to perform doesn’t mean they have the right SINS on the right Schedule. The Ordering Officer needs to look at the major tasks in the PWS and determine which Schedules/SINs are most appropriate for the preponderance of the work. The GSA PCO can give advice on scope issues, but the decision to accept or reject that advice always rests with the Ordering Officer.

2.2B. “The best way to identify sources is to do some labor category shopping at *GSA Advantage* the same way I buy office supplies. I just type the labor category title in the search box.”

Wrong. Because there are no standard labor categories on GSA Schedule contracts, labor category shopping is a bad idea. For example, “Project Manager” or “Consultant” or “Scientist” can properly appear on multiple (sometime very different) Schedules. Even on the same Schedule, two contractors could have labor categories with identical titles, but very different labor category descriptions (different education, qualifications, and experience).

2.3. Episode Topic: Market Research for Schedule

Orders How do we determine which Schedule is the best fit? Then, how do we find sources (Schedule contractors) to receive the RFQ?



Basic Schedule RFQ Process

- Requirements Identification
- Market Research
- Acquisition Planning
- Develop Performance Work Statement
- Develop & Distribute RFQ(w/ Eval Factors)
- Evaluate Quotes Received
- Task Order Award

RFI/Draft RFQ

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The Scope of the “Professional Service Schedules”

What are some of the general categories of services available?
See the attached Handout for the SINs on what we are calling the “Service Schedules” on these podcasts.



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Did You Know Schedules Can Be Use for...?

- Recycling computer monitors (Environmental)
- Food service for soldiers in Iraq (Logistics)
- Agency reorganizations [even GSA's] (MOBIS)
- Aircraft electronic maintenance (Logistics)
- Commercial activity (A-76) studies (MOBIS)
- Translation of Osama bin Laden tapes (Language)

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Schedule in the Spotlight: Mission Oriented Business Integrated Services (MOBIS) Schedule 874

Dave interviews Kathleen Sewell, a Lead Contracting Officer for the Schedule 874 Mission Oriented Business Integrated Services (MOBIS) Schedule. What types of services are MOBIS and what services might fit better under a different Schedule?

See the MOBIS Schedule webpage found at: <http://www.gsa.gov/mobis> for more information.

Update: Note that since Kathee was interviewed in November 2007, MOBIS SIN 874-6 is now (March 2008) 874-6 *Acquisition Management Support*, the scope of which is:

- a. acquisition planning assistance, including market research and recommending procurement strategy
- b. acquisition document development, including cost/price estimates, quality assurance surveillance plans, statements of work, synopses, solicitations, price negotiation memoranda, etc.
- c. expert assistance in supporting proposal evaluations, including price/cost analysis or technical proposal analysis
- d. contract administration support services, including assistance with reviewing contractor performance, developing contract modifications, and investigating reports of contract discrepancies
- e. contract close-out assistance
- f. Competitive Sourcing support, including OMB Circular A-76 studies, strategic sourcing studies, privatization studies, public-private partnerships, and Federal Activities Inventory Reform (FAIR) Act studies.

Inherently Governmental services as identified in [FAR 7.503](#) or by the ordering agency are **prohibited** under MOBIS. It is the responsibility of the Ordering Officer placing the order to make this determination. Ordering activities must require prospective contractors to identify potential conflicts

of interest and address those in their quote. For more information, see the Ordering Guide located in the [MOBIS Library](#).

Note that the scope and name of MOBIS SIN 874-6 is now different than shown on this slide and different than discussed by Kathee.

MOBIS Services

874-1	Consulting Services
874-2	Facilitation Services
874-3	Survey Services
874-4	Training Services
874-5	Support Products
874-6	Privatization Support Services & Documentation (A-76)
874-7	Program Integration and Project Management Services

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Some MOBIS Tasks

- Quality Management
- Business Process Re-engineering
- Strategic & Business Planning
- Benchmarking
- Competitive Sourcing
- Activity-Based Costing
- Financial Management Analysis
(related to mission improvement effort)

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More MOBIS Task Examples

- Statistical Process Control
- Surveys
- Individual & Organizational Assessments & Evaluation
- Process Improvements
- Process Modeling and Simulation
- Performance Measurement

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Not Within MOBIS Scope

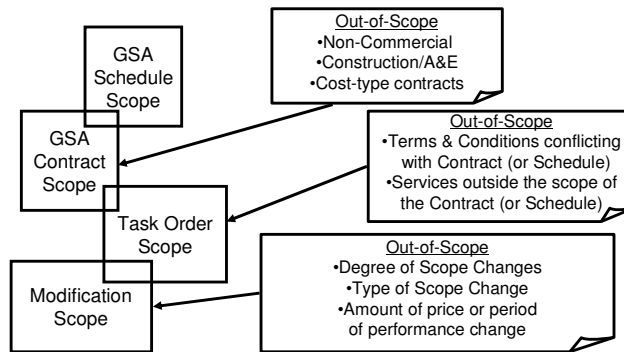


- × Financial Management, Financial Audits
- × Engineering Services
- × IT Systems Integration, Network Services
- × IT Hardware/Software not specifically related to MOBIS consulting/project management efforts
- × Administrative Support (unless directly related to MOBIS consulting/project management efforts)
- × Human Resources Services/HR ADR

MOBIS Focus = Management, Not Contracting for Daily Operations ³⁶

What Do We Mean When We Say “In-Scope”

In-Scope or Out-of-Scope?



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Scope Determination Steps

- Search *eLibrary* for keywords in the SIN descriptions
- Read about that Schedule (references, FAQs, POC) at that Schedule's web page at gsa.gov (not *eLibrary*, Handout B web links)
- Read scope pages in that Schedule's standing RFP on FedBizOpps. There's more to scope than a few *eLibrary* sentences!
- Talk to your CSD (and provide your PWS) to contact that Schedule's POC (shown at Schedule's web page and *eLibrary* SIN page) at a GSA Acquisition Center
- [Careful] Use keywords from your PWS in a advanced Services-only search at *Advantage*.

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How can we be certain we are using the correct schedule/SIN?

See the “Scope Determination Steps” described in the in the podcast program consult and the eTools search hints shown in the attached.

Once you have defined your requirements in a Performance Work Statement (PWS), use GSA's eTools to determine the Schedule(s) and SIN(s) of best fit. In general, for each of your major PWS tasks:

- a. The attached listing of the Schedules/SINs for services is a good starting place to find a Schedule to investigate further. As shown on that handout, every Schedule has a web page containing descriptive information and points of contact.
- b. Go to Schedules eLibrary (www.gsaelibrary.gsa.gov) for each Schedule of interest and read the one-paragraph SIN descriptions to determine which SIN(s) apply. (Clicking on a SIN hyperlink there will display a list of contractors awarded that particular SIN.)
- c. If you are still unsure if the SIN briefly described at Schedules eLibrary satisfies your PWS requirements, go to that Schedule's standing RFP at FedBizOpps. (Use the links in the program notes to get that Schedules web page and then follow the “Solicitation” link there.)
- d. If, after reading the Schedule's web page (and talking to the listed GSA Schedule POC, if necessary), the Schedules eLibrary SIN descriptions, and the scope pages in the FedBizOpps-posted Schedule

RFP, you are still uncertain as to which Schedules/SINs apply, forward your PWS to your local Customer Service Director (www.gsa.gov/csd) with a request for scope determination assistance. The final decision as to scope determination rests with the ordering agency, but a GSA Contracting Officer may be able to provide advice.

e. You may find that multiple SINs and even multiple Schedules will be necessary for a complex PWS. Your RFQ needs to list all the Schedule(s) and SIN(s) you have determined necessary to accomplish your PWS. This is a Government determination and is not to be left to Schedule contractors to decide.

Scope Determination Pitfalls

- Failure of Ordering Officer to Show Schedule and SINs on RFQ
- “Whatever GSA Schedule You Have” (the chosen contractor)
- “Labor Category Shopping” rather than determining the SINs required to accomplish the PWS.
- “Schedule A or Schedule B” (treating Schedule scopes as interchangeable)

**“Wrong Schedule” Order is Protestable by
“Right Schedule” Contractor**

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Closing

- Episode Summary
- Future Episode Summary
- Disclaimers

Do you have any comments, questions or suggestions about this episode or our podcasts in general? Please contact us at: MSCPodcast@gsa.gov .

Check out our blog at <http://www.schedulesolutions.net>
That's where you will find the podcast audiofiles and the program notes.

Attached:

1. List of GSA Schedules.
2. Service Schedules and Their SINS (note the webpage for each Schedule)
3. GSA eTools Useful for Schedules Scope Determination/Market Research

PROGRAM NOTES – EPISODE 2 (3/10/2008)

- [00CORP](#) THE CONSOLIDATED SCHEDULE
- [00JWOD](#) NIB/NISH PRODUCTS
- [03FAC](#) FACILITIES MAINTENANCE AND MANAGEMENT
- [23 V](#) VEHICULAR MULTIPLE AWARD SCHEDULE (VMAS)
- [26 I](#) TIRES, PNEUMATIC (NEW), FOR PASSENGER, LIGHT TRUCK, MEDIUM TRUCK, AND BUS, AND RETREAD SERVICES
- [36](#) THE OFFICE, IMAGING AND DOCUMENT SOLUTION
- [48](#) TRANSPORTATION, DELIVERY AND RELOCATION SOLUTIONS
- [51 V](#) HARDWARE SUPERSTORE
- [56](#) BUILDINGS AND BUILDING MATERIALS/INDUSTRIAL SERVICES AND SUPPLIES
- [58 I](#) PROFESSIONAL AUDIO/VIDEO, TELECOMMUNICATIONS, AND SECURITY SOLUTIONS
- [65 I B](#) PHARMACEUTICALS AND DRUGS
- [65 II A](#) MEDICAL EQUIPMENT AND SUPPLIES
- [65 II C](#) DENTAL EQUIPMENT AND SUPPLIES
- [65 II F](#) PATIENT MOBILITY DEVICES
- [65 V A](#) X-RAY EQUIPMENT AND SUPPLIES
- [65 VII](#) INVITRO DIAGNOSTICS, REAGENTS, TEST KITS AND TEST SETS
- 66 SCIENTIFIC EQUIPMENT & SERVICES
- [66 III](#) CLINICAL ANALYZERS, LABORATORY, COST-PER-TEST
- [67](#) PHOTOGRAPHIC EQUIPMENT - CAMERAS, PHOTOGRAPHIC PRINTERS AND RELATED SUPPLIES & SERVICES (DIGITAL AND FILM-BASED)
- [69](#) TRAINING AIDS & DEVICES, INSTRUCTOR-LED TRAINING; COURSE DEVELOPMENT; TEST ADMINISTRATION
- [70](#) INFORMATION TECHNOLOGY EQUIPMENT, SOFTWARE, AND SERVICES
- [71 I](#) OFFICE FURNITURE
- [71 II](#) HOUSEHOLD AND QUARTERS FURNITURE
- [71 II H](#) PACKAGED FURNITURE
- [71 II K](#) COMPREHENSIVE FURNITURE MANAGEMENT SERVICES (CFMS)
- [71 III](#) SPECIAL USE FURNITURE
- [71 III E](#) MISCELLANEOUS FURNITURE
- [72 I A](#) FLOOR COVERINGS
- [72 II](#) FURNISHINGS
- [73](#) FOOD SERVICE, HOSPITALITY, CLEANING EQUIPMENT AND SUPPLIES, CHEMICALS AND SERVICES

PROGRAM NOTES – EPISODE 2 (3/10/2008)

- [75](#) OFFICE PRODUCTS/SUPPLIES AND SERVICES AND NEW PRODUCTS/TECHNOLOGY
- [76](#) PUBLICATION MEDIA
- [78](#) SPORTS, PROMOTIONAL, OUTDOOR, RECREATION, TROPHIES AND SIGNS
- [81 I B](#) SHIPPING, PACKAGING AND PACKING SUPPLIES
- [84](#) TOTAL SOLUTIONS FOR LAW ENFORCEMENT, SECURITY, FACILITIES MANAGEMENT, FIRE, RESCUE, CLOTHING, MARINE CRAFT AND EMERGENCY/DISASTER RESPONSE
- [520](#) FINANCIAL AND BUSINESS SOLUTIONS (FABS)
- [541](#) ADVERTISING & INTEGRATED MARKETING SOLUTIONS (AIMS)
- [599](#) TRAVEL SERVICES SOLUTIONS
- [621 I](#) PROFESSIONAL AND ALLIED HEALTHCARE STAFFING SERVICES
- [621 II](#) MEDICAL LABORATORY TESTING AND ANALYSIS SERVICES
- [736](#) TEMPORARY ADMINISTRATIVE AND PROFESSIONAL STAFFING (TAPS)
- [738 II](#) LANGUAGE SERVICES
- [738 X](#) HUMAN RESOURCES & EQUAL EMPLOYMENT OPPORTUNITY SERVICES
- [751](#) LEASING OF AUTOMOBILES AND LIGHT TRUCKS
- [871](#) PROFESSIONAL ENGINEERING SERVICES
- [874](#) MISSION ORIENTED BUSINESS INTEGRATED SERVICES (MOBIS)
- [874 V](#) LOGISTICS WORLDWIDE (LOGWORLD)
- [899](#) ENVIRONMENTAL SERVICES

To see the current list of all GSA Schedules, go to <http://www.gsaelibrary.gsa.gov> and pull down "Federal Supply Schedule Listing" from the menu bar.

Some Services SINS on GSA Multiple Award Schedules¹

For more information on these Schedules/SINs, see:

<http://www.gsaelibrary.gsa.gov>

then select the Schedule number (03FAC, 899, etc.) from the *Quick Schedule* pull-down menu in the upper right corner of the screen.

Latest FedBizOps RFP posting date is shown after Schedule name.

(00CORP) Consolidated Schedule (6/21/2007)

<http://www.gsa.gov/consolidated>

All Schedules below indicated with an asterisk (*) are part of the Consolidated Schedule

***(03FAC) Facilities Maintenance Plus (1/9/2008)**

<http://www.gsa.gov/cfmhservices>

- 371-1 Grounds Maintenance
- 371-2 Tree Planting/Trimming/Removal
- 371-3 Pest Control
- 371-4 Cemetery Maintenance
- 541-1 Independent Elevator Inspection Services
- 561-1 Fire Alarm System Preventive Maintenance & Repair Services
- 561-2 Water Based Fire Suppression System Preventive Maintenance & Repair Services
- 801-1 Surface Preparation
- 801-2 Application of Chemical Compounds
- 811-1 Elevator and Escalator Preventative Maintenance
- 811-2 Complete Facilities Maintenance
- 811-3 Complete Facilities Management
- 811-4 Electrical, and All Utility Services - Limited to Facility Maintenance
- 811-5 Refrigeration, Heating, Ventilation and Air Condition HVAC Maintenance
- 811-6 Facilities Maintenance and Management Consulting
- 812-1 Dry Docking Services
- 812-2 Dockside Maintenance and Repair Services
- 871-200 Energy Management Program Support
- 871-201 Energy Audit Services

***(36) Office, Imaging, and Document Solutions (8/3/2007)**

<http://www.gsa.gov/furniture> then select 36

- 51-501 Needs Assessment and Analysis Services
- 51-503 Education and Training Support Services
- 51-504 Records Management Services
- 51-505 Document Production On-site and Off-site Services
- 51-506 Document Conversion Services
- 51-507 Destruction Services
- 51-508 Litigation Support Services
- 51-509 Network Connectivity Support Services
- 733-1 Mail Room Management Services
- 733-2 Presort Mail
- 733-3 Miscellaneous Mail Services
- 733-4 List Management Services

¹ Outdated after 1/24/2008. List does not include product SINS or “other”/ancillary (e.g., installation) services tied to Schedule products/systems. Any separate SINS for “Other Direct Costs,” ”Support Products,” “New Services,” or maintenance service for product SINS are also omitted.

PROGRAM NOTES – EPISODE 2 (3/10/2008)

733-5 Mailroom Ergonomic Analysis Services
733-6 Mail Screening and Inspection Services

(48) Transportation, Delivery, and Relocation Solutions (TDRS) (1/23/2008)

<http://www.gsa.gov/tdrs>

411-1 Ground Passenger Transportation Services
411-2 Rental Supplemental Vehicle Program
411-3 Transportation Consulting Services
451-1 Express Small Package and Express Heavyweight Delivery Services
451-2 Ground Small Package Delivery Services
451-3 Local Courier Delivery Services (*Small Businesses*)
653-1 Relocation Services Package
653-3 Relocation Software and Technology Tools
653-4 Additional [Relocation] Services
653-5 Agency Customization Services
653-7 Move Management Services
653-8 Office Relocation
653-9 Corporate Housing Lodging Services

(58 I) Professional Audio/Visual, Telecommunications, and Security Solutions (9/20/2007)

<http://www.gsa.gov/furniture> then 58 I

58-8-Professional Audio/Video Assessment, Design and Integration
58-9 Professional Audio/Video Production (See also SIN 541-4B)
58-10 Professional Audio/Video Services NEC

***(69) Training Aids & Devices, Instructor Led Training, Course Development, and Test Administration (11/1/2007)**

<http://www.gsa.gov/schedule69>

27-400 Instructor Led Training
27-500 Course Development and Test Administration
27-600 Acquisition Training for 1102's

***(70) Information Technology (IT) (8/14/2007)**

<http://www.gsa.gov/itcenter>

132-50 Classroom Training
132-51 Information Technology Professional Services
132-52 Electronic Commerce Services
132-53 Wireless Services
132-60 Authentication Products and Services/Access Certificates for Electronic Services (ACES)
132-61 Public Key Infrastructure (PKI) Shared Service Provider (SSP)
132-62 HSPD-12 Product and Service Components

(84) Total Solutions for Law Enforcement, Security, Facilities Management, Fire, Rescue, Clothing, Marine Craft, and Emergency/Disaster Response (1/16/2008)

<http://www.gsa.gov/firesecurity>

246-52 Professional Security/Facility Management Services
246-54 Guard Services
246-60-1 Security Systems Integration & Design Services
246-60-2 Security Management and Support Services
246-60-3 Security System Life Cycle Support

***(520) Financial and Business Solutions (FABS) (9/7/2007)**

<http://www.gsa.gov/fabs>

520-1 Program Financial Advisor

PROGRAM NOTES – EPISODE 2 (3/10/2008)

- 520-2 Transaction Specialist
- 520-3 Due Diligence & Support Services
- 520-4 Debt Collection
- 520-5 Loan Servicing & Asset Management
- 520-6 Professional Legal Services
- 520-7 Financial & Performance Audits
- 520-8 Complementary Audit Services
- 520-9 Recovery Audits
- 520-10 Transportation Audits (*Small Businesses*)
- 520-11 Accounting
- 520-12 Budgeting
- 520-13 Complementary Financial Management Services
- 520-14 Audit & Financial Training Services (*Small Businesses*)
- 520-15 Outsourcing Recurring Commercial Activities for Financial Management Services
- 520-16 Business Information Services

***(541) Advertising and Integrated Marketing Solutions (AIMS) (6/22/2007)**

<http://www.gsa.gov/aim>

- 541-1 Advertising Services
- 541-2 Public Relations Services
- 541-3 Web Based Marketing Services (*Small Businesses*)
- 541-4A Market Research and Analysis
- 541-4B Video/Film Production
- 541-4C Exhibit Design and Implementation Services
- 541-4D Conference, Events and Tradeshow Planning Services (*Small Businesses*)
- 541-4E Commercial Photography Services (*Small Businesses*)
- 541-4F Commercial Art and Graphic Design Services (*Small Businesses*)
- 541-5 Integrated Marketing Services

(599) Travel Services Solutions (TSS) (3/25/2004, Amend 8/22/2007)

<http://www.gsa.gov/tss>

- 599-1 Travel Consultant Services
- 599-2 Travel Agent Services/Travel Management Center Services

(736) Temporary Administrative and Professional Staffing (6/22/2007) (Schedule is Reserved for Small Businesses Only)

<http://www.gsa.gov/tempservices>

- 736-1 Administrative Support and Clerical Occupations
- 736-2 Automatic Data Processing Occupations
- 736-3 General Service and Support
- 736-4 Information and Arts Occupations (including Miscellaneous Occupations)
- 736-5 Technical and Professional Occupations

***(738 II) Language Services (5/4/2006)**

<http://www.gsa.gov/language>

- 382-1 Translation Services
- 382-2 Interpretation Services
- 382-3 Training & Educational Material

***(738X) Human Resources Management and Equal Opportunity Services (5/21/2007)**

<http://www.gsa.gov/hreeo>

- 595-21 Human Resources General Support Services
- 595-22 HR Private Shared Service Center – Core Requirements
- 595-25 EEO Services

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595-26 HR Private Shared Service Center – Non-Core Requirements

***(871) Professional Engineering Services (PES) (11/1/2007)**

<http://www.gsa.gov/eng>

- 871-1 Strategic Planning for Technology Programs/Activities
- 871-2 Concept Development and Requirements Analysis
- 871-3 System Design, Engineering and Integration
- 871-4 Test and Evaluation
- 871-5 Integrated Logistics Support
- 871-6 Acquisition and Life Cycle Management

***(874) Mission Oriented Business Integrated Services (MOBIS) (1/30/2008)**

<http://www.gsa.gov/mobis>

- 874-1 Consulting Services
- 874-2 Facilitation Services
- 874-3 Survey Services
- 874-4 Training Services
- 874-5 Support Products
- 874-6 Acquisition Management Support
- 874-7 Program Integration and Project Management Services

***(874 V) Logistics Worldwide (LOGWORLD) (8/30/2006)**

<http://www.gsa.gov/logworld>

- 874-501 Supply and Value Chain Management
- 874-502 Acquisition Logistics
- 874-503 Distribution and Transportation Logistics Services
- 874-504 Deployment Logistics
- 874-505 Logistics Training Services
- 874-506 Support Products
- 874-507 Operations & Maintenance Logistics Management and Support Services

***(899) Environmental Services (8/20/2007)**

<http://www.gsa.gov/environmentalservices>

- 899-1 Environmental Planning Services & Documentation
- 899-2 Environmental Compliance Services
- 899-3 Environmental Occupational Training Services
- 899-4 Waste Management Services
- 899-5 Reclamation, Recycling and Disposal Services
- 899-6 Environmental Advisory Services
- 899-7 Geographic Information Services
- 899-8 Remediation Services

Notes on Some GSA Websites (eTools)

a. *Schedules eLibrary*

(<http://www.gsaelibrary.gsa.gov>)

- For information on a particular Schedule (SIN descriptions and list of contractors holding that SIN) pull-down Schedule name/number from *Quick Schedule* in upper right or from *Federal Supply Schedule Listing*
- Clicking on a contractor name gives information on that company's Schedule contract (or contracts), including contact information for both the company and for the GSA Contracting Officer.
- Use the search text box at the *Schedules eLibrary* home page to search by contractor name, Schedule contract number, or words in a SIN description (but not the text in a contractor's pricelist directly - - use *Advantage* for that).
- At a contractor's *eLibrary* page (showing SINs awarded), click on "Contract Terms & Conditions" to open up that particular contractor's price list (labor categories and rates for preparation of Government Estimate or for market research). Remember that that document is simply a GSA-approved pricelist. It is only a part of the awarded contract and does not include Schedule contract clauses.

b. *GSA Advantage*

(<http://www.gsaadvantage.gsa.gov>)

- Use search text box (*Advanced Search* is useful) at *Advantage* home page to search for PWS-relevant words in contractor's Schedule price lists.
- Remember to select search in "Services" (pull down) to limit results just to services.
- Always check a Schedule contractor's Task Order price quote against their GSA-approved *Advantage*-posted contract pricelist. The only assurance you have that a contractor was actually awarded a SIN, a labor category, or a particular (ceiling) price is to see that pricelist on the *GSA Advantage* website.
- *Advantage* is also an ordering method for products or for some very simple services not requiring a PWS.

c. eBuy (<http://www.ebuy.gsa.gov>)

- A Schedule RFQ system also very useful for Requests for Information/Sources Sought notices. Use it in the same way we would use FedBizOpps for non-Schedule market research (like posting a draft PWS for industry comment).
- A good method to communicate requirements to all holders of a particular SIN, either a new requirement or as part of market research.
- Can attach PWS or drawings to an *eBuy* RFQ (5MB limit for each document)
- Learn about using *eBuy* for RFQs by selecting *eBuy Training* and then *Buyer Tutorial*