

DHS-wide Professional Services Blanket Purchase Agreements (BPAs) Ordering Guide

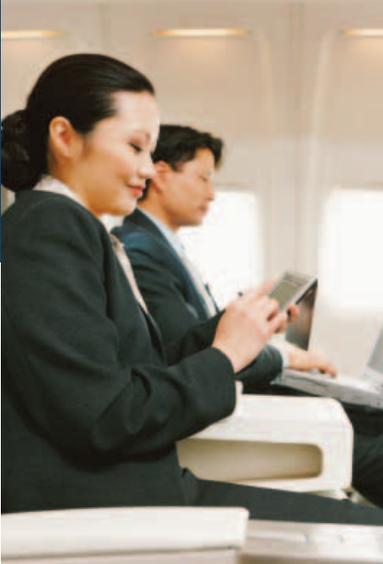


Table of Contents

DHS-wide Professional Services Blanket Purchase Agreements (BPAs) Ordering Guide

1.0 Professional Services BPAs Background	1
2.0 BPAs for Professional and Program Management Support Services	1
3.0 BPAs for Accounting, Budgeting and Complementary Financial Management Services	4
4.0 Roles and Responsibilities.....	7
5.0 Ordering Procedures.....	9
6.0 Ordering Notables	11

1.0 Professional Services BPAs Background

The Department of Homeland Security (DHS) Strategic Sourcing Program Office (SSPO) has formed a partnership with the General Services Administration (GSA) and has established Blanket Purchase Agreements (BPAs) to provide DHS with expert and experienced business-oriented professional and program-management and financial management support services for use by all DHS Components, offices, directorates and agencies.

1.1 Objective

The overall objective of the BPAs is to provide expert and experienced business-oriented services, enhancing the performance, quality, timeliness and efficiency of DHS programs, and to continually improve DHS mission performance.

1.2 About Professional and Program Management Support Services and Accounting, Budgeting and Complementary Financial Management Services

This ordering guide addresses two BPAs covering Professional and Program Management Support Services (see section 2.0) and Accounting, Budgeting and Complementary Financial Management Services (see section 3.0). These BPAs have been awarded against two GSA Multiple Award Schedules: MOBIS for Professional and Program Management Support Services and FABS for Accounting, Budgeting and Complementary Financial Management Services.

2.0 BPAs for Professional and Program Management Support Services

2.1 Scope

In partnership with the General Services Administration (GSA), DHS has established Blanket Purchase Agreements (BPAs) against contracts under the GSA FSS Mission Oriented Business Services (MOBIS) Schedule 874, with nine (9) vendors providing a broad range of professional business support services. A sample of the scope of services available to DHS customers includes:

- ❖ **Acquisition Management Support:** Providing acquisition planning assistance; developing acquisition documents, statements of work, synopses, and solicitations; expert assistance in evaluating proposals; and contract administration services.
- ❖ **Consulting Services:** Providing expert advice, assistance, guidance or counseling in support of the Component's mission-oriented business functions.
- ❖ **Facilitation Services:** Providing facilitation and related decision support services for Components engaged in collaboration efforts, working groups, or integrated product, process or self-directed teams.
- ❖ **Program and Project Management:** Providing planning, initiating, managing, executing and closing out mission-oriented business programs and projects.
- ❖ **Survey Services:** Providing surveying related to mission-oriented business issues.
- ❖ **Training Services:** Providing off-the-shelf or customized training packages to meet specific Component needs related to business services.

Benefits of Using the Program Management BPAs. There are numerous benefits to using DHS BPAs for both simple and complex support requirements, including:

- ❖ 10 – 30% guaranteed discounts with latitude for further price reductions;
- ❖ Broad labor categories providing combinations of skills to meet complex requirements;
- ❖ Leading industry vendors with substantial DHS experience immediately available; and
- ❖ Quicker, simpler ordering, typically less than 30 days.

2.2 Contracting Officials

2.2.1 Contracting Officer (CO)

The assigned GSA Contracting Officer is:

Brad deMers

General Services Administration
Management Services Center
400 15th St., SW
Auburn, WA 98001

E-mail: brad.demers@gsa.gov

Phone: (253) 931-7196

2.2.2 Contracting Officer's Technical Representative (COTR)

The COTR assigned from DHS SSPO to manage the BPAs and support the GSA CO during administration of this effort is:

Deborah Ford

Department of Homeland Security
Office of the Chief Procurement Officer
Strategic Sourcing Program
245 Murray Lane, Building 410
Washington, DC 20528

E-mail: deborah.ford@dhs.gov

Phone: (202) 447-5260

2.2.3 Component Contracting Officer and COTR

DHS Component Contracting Officer (CCO) and Component COTR will be assigned by the Component at the task order level.

2.3 Period of Performance

The period of performance cannot exceed the vendor's GSA FSS 874 Contract. Therefore the BPA will expire on the expiration of the vendor's FSS Contract against which the BPA is written or five years after award, whichever occurs first. The period of performance is provided below:

- ❖ Base Year (June 2, 2006 – June 1, 2007)
- ❖ Option Year 1 (June 2, 2007 – June 1, 2008)
- ❖ Option Year 2 (June 2, 2008 – June 1, 2009)
- ❖ Option Year 3 (June 2, 2009 – June 1, 2010)
- ❖ Option Year 4 (June 2, 2010 – June 1, 2011)

2.4 BPA Holders

Vendor contact information is provided below should you have any questions or would like to contact the vendor regarding their capabilities. Information regarding Teaming Arrangements with the BPA holders is also located on the DHS enterprise-wide contract portal, which is accessible via the main DHS Online landing page or through DHS *Advantage!*.

BAE Systems Information Technology, LLC

BPA No: GS-10F-06-LP-A-0003

Web: www.baesystems.com

Vendor Rep: Carrie Teresa Maison

Phone: (703) 563-7525

Customer Value Partners

BPA No: GS-10F-06-LP-A-0004

Web: www.cvpcorp.com

Vendor Rep: Scott Goodman

Phone: (443) 316-3006

Deloitte Consulting, LLP

BPA No: GS-10F-06-LP-A-0005

Web: www.deloitte.com

Vendor Rep: Don Ervine

Phone: (703) 885-6216

Grant Thornton, LLP

BPA No: GS-10F-06-LP-A-0006

Web: www.grantthornton.com

Vendor Rep: Ron Polito

Phone: (703) 637-2977

ICF Incorporated, LLC

BPA No: GS-10F-06-LP-A-0007

Web: www.icfconsulting.com

Vendor Rep: Lou Pack

Phone: (703) 934-3467

Kadix Systems

BPA No: GS-10F-06-LP-A-0008

Web: www.kadix.com

Vendor Rep: Rick Bostian

Phone: (703) 236-0935

SiloSmashers, Inc.

BPA No: GS-10F-LP-A-0009

Web: www.silosmashers.com

Vendor Rep: Cheryl Roberts

Phone: (703) 797-5726

Touchstone Consulting Group

BPA No: GS-10F-06-LP-A-0010

Web: www.touchstone.com

Vendor Rep: Richard Boulton

Phone: (202) 449-7129

The Tauri Group, LLC

BPA No: GS-10F-06-LP-A-0011

Web: www.taurigroup.com

Vendor Rep: Sara Racette

Phone: (240) 462-3863

2.4.1 Team Partners and Subcontractors

A complete list of team partners and subcontractors and awarded discount rates are available through DHS Online or through DHS *Advantage!*.

2.4.2 Review the Special Ordering Instructions for Acquisition Management Support at www.gsa.gov.

3.0 BPAs for Accounting, Budgeting and Complementary Financial Management Services

3.1 Scope

In partnership with GSA, DHS has established Blanket Purchase Agreements (BPAs) with 12 vendors under the GSA FSS Financial and Business Solutions (FABS) Multiple Award Schedule 520, providing a broad range of financial management support services. A sample of the scope of services available to DHS customers includes:

- ❖ **Accounting:** Analyzing processes and summarizing transactions; assisting in devising new or revised accounting policies and procedures; and performing special studies to improve accounting operations.
- ❖ **Budgeting:** Assessing and improving the budget formulation and execution processes; conducting special reviews of budget formulation or execution issues; and reviewing budgetary controls.
- ❖ **Complementary Financial Management Services:** Assessing and improving financial management systems; conducting A-127 system compliance reviews; identifying system requirements; assisting with improving and streamlining reporting and analysis processes; performing cost-benefit analysis or other special financial analyses; and assisting with strategic and operational financial planning.

3.1.1 Benefits of Using the Accounting, Budgeting and Complementary Financial Management Services BPAs.

There are numerous benefits to using DHS BPAs for both simple and complex support requirements, including:

- ❖ 2 – 37% guaranteed discounts with latitude for further price reductions;
- ❖ Broad labor categories providing combinations of skills to meet complex requirements;
- ❖ Leading industry vendors with substantial DHS experience immediately available; and
- ❖ Quicker, simpler ordering, typically less than 30 days.

3.2 Contracting Officials

3.2.1 Contracting Officer (CO)

The assigned GSA Contracting Officer is:

Denise Alley

U.S. General Services Administration
Center for Services Acquisition
2200 Crystal Drive, Room 706
Arlington, VA 22202

E-mail: denise.alley@gsa.gov

Phone: (703) 605-2756

Fax: (703) 605-9948

3.2.2 Contracting Officer's Technical Representative (COTR)

There will be a COTR assigned from DHS to manage the BPA and support the GSA CO during administration of this effort. The COTR assigned is:

Deborah Ford

Department of Homeland Security
Office of the Chief Procurement Officer
Strategic Sourcing Program
245 Murray Lane, Building 410
Washington, DC 20528

E-mail: deborah.ford@dhs.gov

Phone: (202) 447-5260

3.2.3 Component Contracting Officer and COTR

DHS Component Contracting Officer (CCO) and Component COTR will be assigned by the Component at the task order level.

3.3 Period of Performance

The period of performance cannot exceed the vendor's GSA FSS 5220 Contract. Therefore the BPA will expire on the expiration of the vendor's FSS Contract against which the BPA is written or five years after award, whichever occurs first. The period of performance is provided below:

- ❖ Base Year (June 12, 2006 – June 11, 2007)
- ❖ Option Year 1 (June 12, 2007 – June 11, 2008)
- ❖ Option Year 2 (June 12, 2008 – June 11, 2009)
- ❖ Option Year 3 (June 12, 2009 – June 11, 2010)
- ❖ Option Year 4 (June 12, 2010 – June 11, 2011)

3.4 BPA Holders

Vendor contact information is provided below should you have any questions or would like to contact the vendor regarding their capabilities.

BearingPoint, Inc.

BPA No: GS-23F-06-FD-A-0001
Web: www.bearingpoint.com
Vendor Rep: Charles Tyrpak
Phone: (703) 747-6118
Email: charles.tyrpak@bearingpoint.com

Kforce Government Solutions, Inc. (formerly Bradson Corporation)

BPA No: GS-23F-06-FD-A-0002
Web: www.kforcegov.com
Vendor Rep: Barbara Lewis
Phone: (703) 245-7468
Email: blewis@kforcegov.com

Deva & Associates, P.C.

BPA No: GS-23F-06-FD-A-0003
Web: www.devagroup.com
Vendor Rep: Arun K. Deva
Phone: (301) 610-5600
Email: adeva@devagroup.com

Eagan, McAllister Associates, Inc.

BPA No: GS-23F-06-FD-A-0004
Web: www.emainc.com
Vendor Rep: Joanna Aguinaldo
Phone: (301) 863-2192
Email: joanna_aguinaldo@emainc.com

Grant Thornton, LLP

BPA No: GS-23F-06-FD-A-0005
Web: www.grantthornton.com
Vendor Rep: Patricia McNamara
Phone: (703) 837-4400
Email: tricia.mcnamara@gt.com

Perot Systems Government Services, Inc.

BPA No: GS-23F-06-FD-A-0006
Web: www.perotsystems.com/government
Vendor Rep: Kevin Krist
Phone: (703) 289-8175
Email: kevin.krist@psgs.com

Quantech Services, Inc.

BPA No: GS-23F-06-FD-A-0007
Web: www.quantechserv.com
Vendor Rep: Susan E. Thibodeau
Phone: (781) 457-0370
Email: sthibodeau@quantechserv.com

Starry Associates, Inc.

BPA No: GS-23F-06-FD-A-0008
Web: www.starry-associates.com
Vendor Rep: Tony Syntax
Phone: (301) 430-0750
Email: tsyntax@starry-associates.com

The MIL Corporation

BPA No: GS-23F-06-FD-A-0009
Web: www.milcorp.com
Vendor Rep: Linda Glasco
Phone: (301) 805-8500
Email: lglasco@milcorp.com

STG, Inc.

BPA No: GS-23F-06-FD-A-0010
Web: www.stginc.com
Vendor Rep: Dorian Dula
Phone: (703) 691-2480, ext. 150
Email: ddula@stginc.com

Deloitte & Touche, LLP

BPA No: GS-23F-06-FD-A-0011
Web: www.deloitte.com
Vendor Rep: Sid Trainor
Phone: (703) 885-6227
Email: sidtrainor@deloitte.com

Booz Allen Hamilton Inc.

BPA No: GS-23F-06-FD-A-0012
Web: contractvehicles.bah.com
Vendor Rep: Susan Hollis
Phone: (703) 377-7252
Email: hollis_susan@bah.com

4.0 Roles and Responsibilities

4.1 BPA Contracting Officer (CO)

The CO for the BPAs will be the GSA representative responsible for:

- ❖ Interpreting the scope, terms or conditions of the basic BPAs;
- ❖ Managing all post-award issues and changes to the BPAs;
- ❖ Maintaining active communication with the DHS Component Contracting Officers, the DHS Contracting Officer's Technical Representative, and the DHS Component Contracting Officer's Technical Representatives;
- ❖ Exercising BPA options;
- ❖ Issuing BPA orders as mutually agreed upon by the DHS CO's Technical Representative and the GSA CO – action shall be in accordance with GSA policy and guidance for purchases on behalf of other agencies;
- ❖ Issuing modifications to the BPAs; and
- ❖ Tracking BPA-level performance and statistics.

4.2 Task Order DHS Component Contracting Officer (CCO)

The CCO will function as an ordering officer in accordance with FAR Part 8.4 and is responsible for:

- ❖ Issuing orders against the BPAs for the Component;
- ❖ Tracking BPA orders to ensure that all requirements are met;
- ❖ Appointing a Component Contracting Officer's Representative for each order placed;
- ❖ Following the ordering procedures included in this guide; and
- ❖ Providing a copy of all orders and modifications issued to the CO and to the COTR.

4.3 BPA Contracting Officer's Technical Representative (COTR)

The COTR is responsible for:

- ❖ Inspecting deliverables and monitoring performance to assure compliance with the requirements of the orders placed;
- ❖ Providing technical clarification relative to the Statement of Work;
- ❖ Ensuring that all invoices are reviewed, approved, and processed by appropriate personnel;
- ❖ Presenting all technical issues that are unresolved to the CCO;
- ❖ Maintaining active communication with the CO and CCOs on items related to the BPAs; and
- ❖ Monitoring the use of the BPAs to provide analysis as required by DHS/GSA partnership.

4.4 Task Order DHS Component Contracting Officer's Technical Representative (Component COTR)

A COTR will be assigned by the CCO to manage each order placed by the Component. The Component COTR is the individual who has overall technical responsibility for efforts associated with the order placed. The Component COTR supports the CCO during administration of this effort through day-to-day coordination of the order placed.

The Component COTR is responsible for:

- ❖ Inspecting deliverables and monitoring performance to assure compliance with the requirements of the order placed;
- ❖ Providing technical clarification relative to the Statement of Work (SOW);
- ❖ Ensuring that all invoices are reviewed, approved and processed by appropriate personnel;
- ❖ Presenting all technical issues that are unresolved to the CCO; and
- ❖ Performing other similar duties as may be specified in the order placed.

The Component COTR also provides technical direction to the BPA holder. Technical direction shall be within the general SOW. The Component COTR does not have the authority to and may not issue any technical direction that:

- ❖ Constitutes an assignment of work outside the general scope of efforts;
- ❖ Constitutes change as defined in FAR 52.212-4 Contractors Terms and Conditions – Commercial Items;
- ❖ In any way causes an increase or decrease in cost or time required for performance;
- ❖ Changes any of the terms, conditions or other requirements; or
- ❖ Suspends or terminates any portion of efforts.

All technical direction that affects the scope of tasks shall be issued in writing by the Component COTR. A copy of the written direction shall be furnished to the CCO no later than three business days after issuance to the contractor.

The written technical direction letter shall include a statement that if, in the opinion of the BPA holder, any instruction or direction issued by a Component COTR is outside of their specific authority, the BPA holder shall not proceed but shall notify the CCO in writing within one (1) working day after receipt of any instruction or direction for subsequent potential action by the CCO.

5.0 Ordering Procedures

The requestor at DHS needs to proceed in accordance with FAR Part 8 when placing an order. Information about ordering from MAS contracts may be found at www.gsa.gov.

STEP 1 The requestor determines the need for services and prepares a Statement of Work (SOW) that includes, at a minimum, work to be performed, location of work, period of performance, deliverable schedule, applicable performance standards, and any special requirements. To the maximum extent practicable, the requirements identified in the SOW shall be documented in performance-based statements.

STEP 2 The requestor submits the SOW, suggested evaluation criteria for selection of awardee, and an appropriate funding document to the CCO.

STEP 3 The CCO shall prepare a Request for Quotation (RFQ) to include, at a minimum, the SOW and evaluation criteria, and a request to submit either a Firm-Fixed Price (FFP) quote or a ceiling price quote for the services outlined in the SOW. The RFQ shall be provided to the BPA holders that offer services that will meet the SOW requirements. In determining the appropriate number of BPA holders that are provided a copy of the RFQ, the CCO may consider, among other factors, the following:

- (1) The complexity, scope and estimated value of the requirement;
- (2) The market research results, which may include specialized capabilities of the BPA holders and BPA holder teams; and
- (3) Socioeconomic factors.

For orders at or below the micro-purchase threshold (\$3,000), the CCO may place the order with any BPA holder that can meet the SOW requirements. The CCO should attempt to distribute orders at or below the micro-purchase threshold among all BPA holders.

For orders exceeding the micro-purchase threshold (\$3,000) but not exceeding the maximum order threshold (which is \$1 million for the basic MOBIS and FABS GSA Schedules), the CCO shall provide the RFQ (including the SOW and evaluation criteria) to at least three BPA holders that can meet the SOW requirements.

For orders exceeding the maximum order threshold (which is \$1 million for the MOBIS and FABS MAS), the CCO shall provide the RFQ (including the SOW and evaluation criteria) to additional BPA holders, beyond the three noted above, that can meet the SOW requirements. The CCO shall also issue the RFQ to any BPA holder requesting it. All responses received must be evaluated.

The CCO shall ensure that all pricing proposals received are in accordance with the minimum team discount awarded under their respective BPAs and should seek further price reductions whenever possible. See FAR 8.405-4.

STEP 4 The CCO, in conjunction with the requestor, shall evaluate all responses received from the BPA holders using the evaluation criteria provided to the BPA holders. The CCO is responsible for considering the level of effort and the mix of labor proposed to perform a specific task being ordered, and for determining that the total price is reasonable.

- STEP 5** The CCO shall place the order with the BPA holder that represents the best value. See FAR 8.404(d).
- STEP 6** After the order is awarded, the CCO shall provide timely notification to the unsuccessful BPA holders. If an unsuccessful BPA holder requests information on an award that was based on factors other than price alone, a brief explanation of the basis for the award decision shall be provided.
- STEP 7** The CCO shall document the following for record: the BPA holders considered, noting the BPA holder from which the service was purchased; the consideration rationale for the BPA holders selected to receive the RFQ; a description of the service purchased; the amount paid; the evaluation methodology used in selecting the BPA holder to receive the task order; the rationale for any tradeoffs in making the selection; the price reasonableness determination; and the rationale for using other than an FFP order or a performance-based order.

6.0 Ordering Notables:

6.1 Firm-Fixed Price

Under these BPAs, a Firm-Fixed Price (FFP) order shall be requested, unless the CCO makes a determination that it is not possible to adequately describe the work to be accomplished in sufficient detail. When such a determination is made, a labor-hour or a time-and-materials quote may be requested.

6.2 Ceiling Prices

A ceiling price must be established for labor-hour and time-and-materials orders.

6.3 Basis for Pricing

All pricing activity shall be based on the BPA hourly rates with any additionally proposed discounts and shall consider the mix of labor categories, travel, other direct costs (ODCs), and level of effort required to perform the services described in the SOW. Travel and ODCs may be handled on a not-to-exceed basis, even for orders in which the basic services are priced on an FFP. The application of G&A (a.k.a. general and administrative expenses) on travel and ODCs is only allowed if specifically permitted in a BPA holder's basic GSA Multiple Award Schedule.

6.4 Award to BPA Holder

The BPA requires that the DHS Components be permitted to solicit and issue orders through the assigned BPA holder team lead only. Awarding an order directly to a team partner must be authorized by the BPA holder team lead. This authorization must be specifically identified in the quote received from the BPA holder team lead in response to an RFQ.

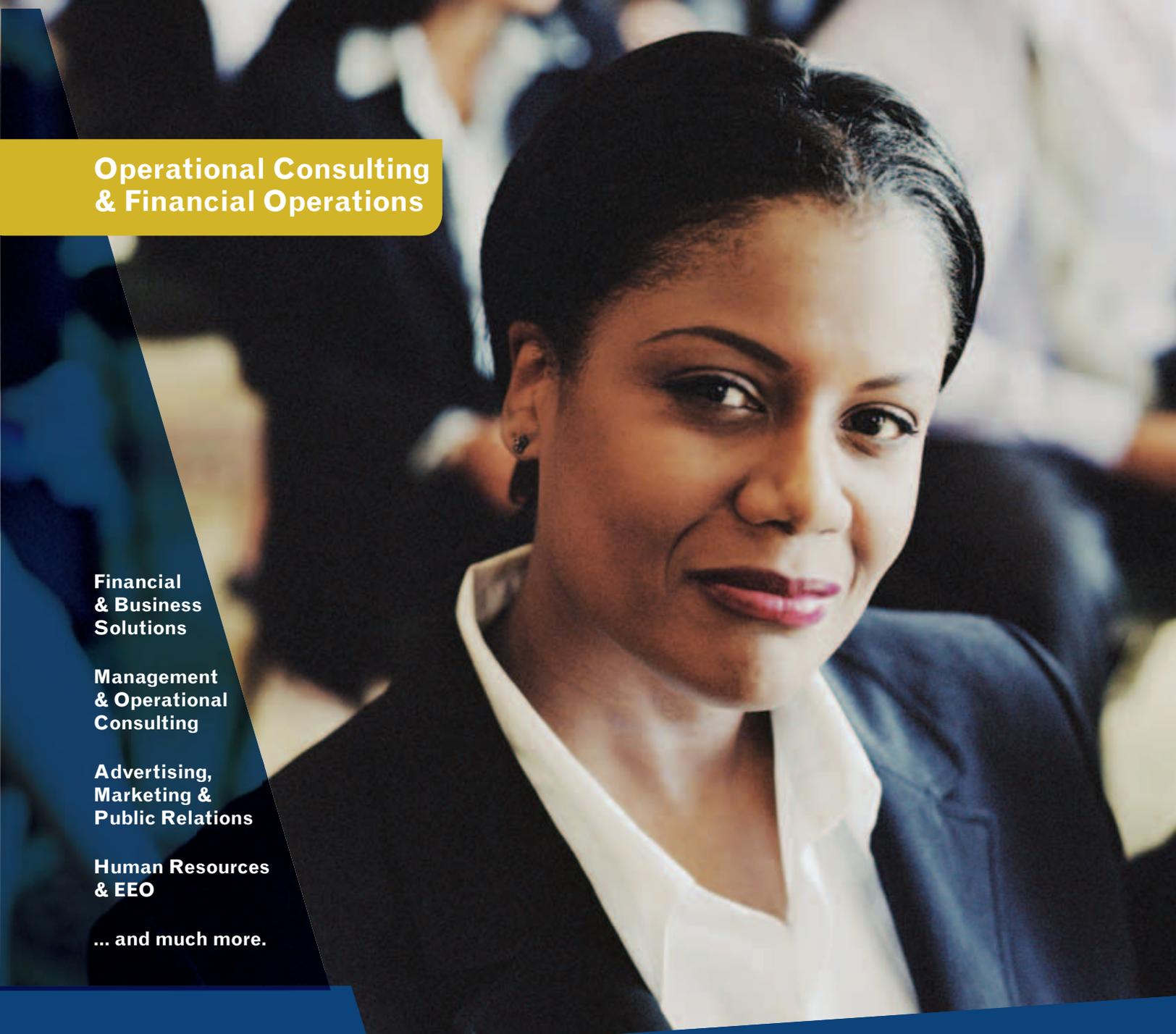
6.5 Accounting and Invoicing

Specific accounting and invoicing procedures will be specified on each order. Although most BPA holder teams will likely accommodate the government's invoicing requests, some BPA holder teams have already defined the manner in which invoicing and payment will be handled among their team, i.e., invoicing/payment to the team lead only or directly to each team partner. The CCO should explore if an arrangement has already been determined prior to issuing any orders to the BPA holder.

6.6 Information to be Included with Orders

Each order issued under these BPAs will include the following information:

1. BPA number and order number;
2. Date of the order;
3. Description of the services to be delivered;
4. Type of order (FFP, labor-hour, time-and-materials);
5. The performance schedule;
6. Place of performance;
7. Line item number and description, quantity, and unit price;
8. Any special instructions or clauses;
9. The payment schedule; and
10. Accounting and appropriation data.



Operational Consulting & Financial Operations

**Financial
& Business
Solutions**

**Management
& Operational
Consulting**

**Advertising,
Marketing &
Public Relations**

**Human Resources
& EEO**

... and much more.

The Business of Your Mission

Accomplishing the business of government today requires doing more with less. Oftentimes that means outsourcing specialized services to manage change, develop programs or measure the effectiveness of an operation to meet your mission's demands. At GSA, we're here to help you serve America better. With an impressive array of management and financial solutions, we facilitate easy, compliant access to the best industry assistance available to meet your needs—all from one source.

GSA is here to help: gsa.gov/fasservices or (800) 488-3111



U.S. General Services Administration



One Country. One Mission. One Source.



5-08-00256
August 2008
www.gsa.gov