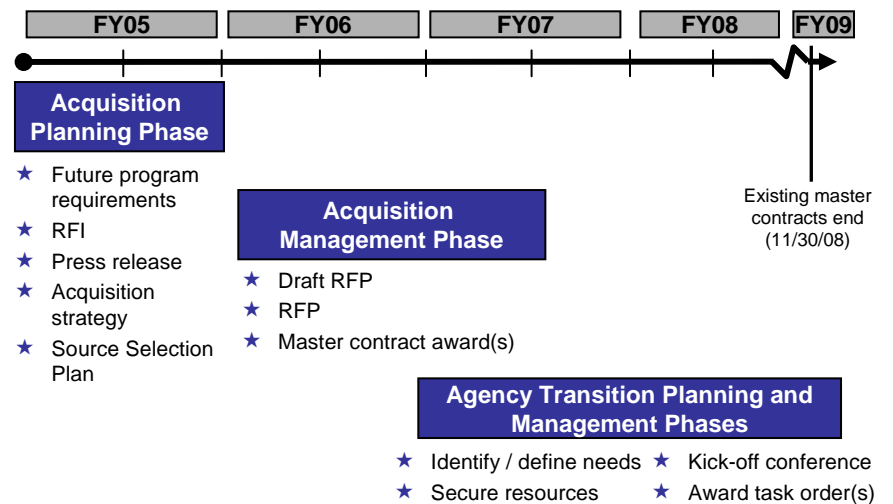# GSA SmartPay® 2 Transition Quick Reference

What is GSA SmartPay® 2?

The existing GSA SmartPay® program enables agencies to obtain purchase, travel, fleet, and integrated charge cards through master contracts with five banks. The current GSA SmartPay® master contracts expire on November 29, 2008. The future program is referred to as GSA SmartPay® 2, or "SP2". Based on customer feedback, the SP2 program seeks to provide agencies with improvements in these key areas:

★ **New products and services:** New products and services will be offered as core requirements, separately priced items, and value added items, including: pre-paid cards, contactless cards, and cards in foreign currencies. SP2 also seeks to offer alternatives to convenience checks;

★ **Enhanced customer service:** 24/7 worldwide customer service has been expanded to include the option for agencies to receive foreign language customer support for cardholders using their cards overseas;

★ **Security of systems and data:** SP2 contains increased security requirements regarding data management and handling, including requirements that successful offerors comply with Federal Information Security Management Act (FISMA) and the Payment Card Industry security standards, house their data facilities in the U.S., and restrict data access to personnel with the required level of security clearance. Successful offerors will also be required to comply with new program data and interface standards;

★ **Enhanced data capture:** SP2 seeks innovative solutions from offerors to improve the quality of data (e.g., expanded collection of Level 3 data) to support the Government's strategic sourcing initiatives, risk mitigation measures, management reporting, and other program reporting objectives;

★ **Tax reclamation:** Improvements in tax reclamation are required to facilitate recovery of taxes paid by agencies on tax exempt government transactions; and

★ **Electronic Access Systems functionality:** Successful offerors' EAS systems would have been verified through live test demos as part of the evaluation process.

When is this transition happening?

The timeline below shows GSA's anticipated milestones for the acquisition, award, and transition to the SP2 master contracts.

| FY05 | FY06 | FY07 | FY08 | FY09 |

Acquisition Planning Phase

★ Future program requirements
★ RFI
★ Press release
★ Acquisition strategy
★ Source Selection Plan

Acquisition Management Phase

★ Draft RFP
★ RFP
★ Master contract award(s)

Existing master contracts end (11/30/08)

Agency Transition Planning and Management Phases

★ Identify / define needs
★ Secure resources
★ Kick-off conference
★ Award task order(s)

RFI = Request for Information; RFP = Request for Proposals

How will the transition affect me?

A/OPCs will need to:
★ Coordinate the issuance of new cards;
★ Oversee the reconciliation and close-out of old accounts;
★ Coordinate IT resources and system testing to be sure the SP2 contractor's system "talks" to the agency's system;
★ Work with others in their agencies (e.g., finance, contracting, IT) to determine needs and develop requirements; and
★ Obtain additional resources or funding to support the transition, as needed.

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GSA SmartPay® 2 Transition Quick Reference

Why is planning for transition important?

Due to the scale and complexity of the transition to SP2, early planning is required. The transition may require a good deal of collaboration among various departments in your organization to define agency needs, plan the logistics, and secure resources.

What transition resources and assistance will the GSA SmartPay® program office provide to agencies?

The GSA SmartPay® program office will work closely with agencies and banks to facilitate a seamless transition. Specifically, the GSA SmartPay® program office will:

★ Establish a transition management team (TMT) to plan and prepare for the transition to minimize impact on agencies and cardholders;

★ Provide transition planning resources for agencies to use, including pre- and post-award checklists, an agency program self assessment tool, a sample Statement of Work (SOW), an executive briefing, transition quick reference guides, and FAQs;

★ Establish Blanket Purchase Agreements (BPAs) for agencies to obtain, at their expense, Contractor assistance to transition to SP2;

★ Facilitate user group meetings for A/OPCs to share information on the performance of their current banks;

★ Provide guidance on developing SOWs;

★ Provide assistance with developing task orders;

★ Provide assistance with negotiations;

★ Coordinate "pool" arrangements;

★ Operate a transition help line; and

★ Provide training at annual GSA SmartPay® Conferences.

What can I do to prepare my agency for the transition?

★ Start planning early;

★ Establish an agency transition management team and a project plan;

★ Seek senior leadership support;

★ Secure additional funding and resources, if needed;

★ Define the agency's current and projected needs;

★ Develop a plan to communicate transition activities;

★ Determine task order type, and develop and award task order;

★ Cleanse data to make sure cardholder data is accurate; and

★ Identify the agency's systems interface requirements and perform systems interface testing, with IT assistance.

Where can I find out more?

www.gsa.gov/gsasmartpay – Check our website regularly for new transition resources and the latest information on the GSA SmartPay® Program.

Look out for *Get Smart* – Our newsletter keeps you up-to-date on the latest happenings within the GSA SmartPay® program. It is available at www.gsa.gov/gsasmartpay under "In the News".

gsa.smartpay@gsa.gov – Send us your questions and comments.

Submit your feedback on the current program and/or SP2 at www.gsa.gov/gsasmartpay under "GSA SmartPay® Feedback Form".

FedBizOpps – The RFP is posted on FBO.gov.