DEC 2 2 2006

MEMORANDUM FOR: Paul A. Dennett
                  Administrator, Office of Federal Procurement Policy

FROM: Michael S. Sade
                  Director for Acquisition Management and
                    Procurement Executive

SUBJECT: Department of Commerce Agency-wide Performance
                  Based Acquisition Management Plan, FY2006 – FY2011

The Department of Commerce submitted its Agency-wide Performance Based
Acquisition Management Plan electronically on December 4, 2006. Forwarded for your
use is the original plan. Please contact Leslie A. Andrecs, Director, Commerce
Acquisition Performance, Policy and Support for questions or additional information
regarding the plan. Leslie can be reached at landrecs@doc.gov or (202) 482-4721.

Attachment

cc: Julia Wise, OFPP

DEPARTMENT OF COMMERCE
ACQUISITION COMMUNITY
PERFORMANCE BASED ACQUISITION MANAGEMENT PLAN
FY2006 – FY2011

The DOC Agency-wide Performance Based Acquisition Management Plan describes the steps DOC Acquisition Community intends to take to achieve acquisition results through PBA methods.

I. Background – *Describe agency mission and buying bureaus or units*

The historic mission of the Department is "to foster, promote, and develop the foreign and domestic commerce" of the United States. This has evolved, as a result of legislative and administrative additions, to encompass broadly the responsibility to foster, serve, and promote the Nation's economic development and technological advancement.

The Department of Commerce Acquisition Community vision is to be partners with our customers to plan, acquire and manage resources to achieve program objectives and mission success.

The Census Bureau (CENSUS) is the largest statistical agency of the federal government. Its mission is to serve as the leading source of quality data about the nation's people and economy. The Census Bureau honor's privacy, protects confidentiality, shares their expertise globally, and conducts work openly.

The National Ocean and Atmospheric Administration (NOAA) is a future-minded environmental science agency whose mission is to understand and predict changes in the Earth's environment and conserve and manage coastal and marine resources to meet the Nation's economic, social and environmental needs.

The National Institute of Standards and Technology (NIST) is a non-regulatory federal agency within the U.S. Commerce Department's Technology Administration. NIST's mission is to promote U.S. innovation and industrial competitiveness by advancing measurement science, standards, and technology in ways that enhance economic security and improve our quality of life.

The United States Patent and Trademark Office (PTO) mission is to foster innovation and competitiveness by providing high quality and timely examination of patent and trademark applications, guiding domestic and international intellectual property policy, and delivering intellectual property information and education worldwide.

II. **Management Support** – *Describe the strategy your agency uses to ensure PBA is applied to the maximum extent practical (e.g. issued policy memorandum requiring review of new acquisitions and existing non-PBAs to determine if these acquisitions are PBA candidates.*

In September 2007, the Office of Acquisition Management (OAM) obtained contractor support for the creation and execution of a comprehensive strategy for achieving performance based service acquisition (PBSA) goals. The resulting PBSA Assessment report outlines the DOC study findings as well as recommendations for improving and increasing the use of PBSA within the Department. OAM will incorporate the recommendations into as many Department-wide acquisition initiatives as appropriate.

The PBSA Assessment report is used by the Department's buying activities to: (a) enhance and strengthen program office commitment to PBSA, (b) further extend the benefits of PBSA to their customers through the institution of best practices, and (c) continue to implement PBSA with their respective contracting offices in order to achieve targeted goals. The report is also serves as a reference tool for contracting professionals, as they serve as the Department's business brokers for program success.

The Commerce Information Technology Solutions (COMMITS) program is a government –wide acquisition contract (GWAC) that provides information technology services and solutions. COMMITS provides the Commerce Department and other Federal agencies with an efficient and effective means of awarding IT services and solution requirements utilizing high quality performance-focused contractors. The program does this through the use of competitively awarded performance-based task orders. Under this acquisition structure, the basic contracts do not contain fixed contract line item numbers (CLINS) or labor categories. Instead COMMITS contractors are free to propose the best solution to the specific requirement of each government agency. The Department policy is that all IT contracts are required to use the COMMITS program and the COMMITS Next Generation program unless there is a legitimate reason not to do so.

III. **Policy and Guidance** – *Provide a summary of the policy, and guidance issued to encourage the use of PBA, if any. Please provide a website link or copy of the guide.*

The table below provides a summary listing of the Department's policies and guidance issued to encourage the use of performance based service acquisition and their associated web link. Performance based service acquisitions are encouraged and incorporated into these documents at various levels.

Commerce Acquisition Performance, Policy & Support Performance Management	
PBSA POLICY & GUIDANCE	**WEB LINKS**
Procurement Memorandum 2005-01 - Increasing the Use of Performance-Based Service Acquisition Attachment A - PBSA Assessment Report	http://oam.ocs.doc.gov/docs/PM_2005-01_Performance_Based_Service_Acquisition.pdf http://oam.ocs.doc.gov/docs/PM_2005-01_Attachment_A-PBSA_Assessment_Report.pdf
Acquisition Planning & Review	http://oam.ocs.doc.gov/CAPPS_performanceManagement.html
Procurement Memoranda 2003-01 - Submission of CO and COTR Resumes	http://oam.ocs.doc.gov/docs/PM_2003-01_CO-COTRResumes.pdf
DAO 208-5 Contracting (Procurement) Review and Approval Requirements	http://204.193.232.34/cgi-bin/doit.cgi?204:112:834508436:142
Procurement Planning System Acquisition Plans	http://204.193.232.34/cgi-bin/doit.cgi?204:112:834508436:144
CAM 07-01 Acquisition Plans	http://oam.ocs.doc.gov/docs/CAM_07-01.htm
CAM 15-2 Formal Source Selection Procedures	http://oam.ocs.doc.gov/docs/CAM_15-2.htm
Commerce Information Technology Review Board (CITRB) Policy	http://www.osec.doc.gov/cio/CITRB.HTM
Documentation of Information Technology Acquisition Initiatives (Exhibit 300) Attachment A to Exhibit 300	http://oamweb.osec.doc.gov/docs/300_Attachment_A_rev_11-01-04.pdf http://oam.ocs.doc.gov/docs/300_Attachment_A_rev_11-01-04.pdf

IV. **Acquisition Process** – *Discuss how PBAs are planned, awarded, selected and managed. Also, briefly explain how the roles of and responsibilities of individuals involved in the contract administration process are communicated.* (e.g. Contracting Officer Representative (COR) letters).

A. *Discuss how PBAs are planned, awarded, selected and managed.*

The purpose of the Department's acquisition planning, review and approval process is to ensure that the Government meets its acquisition needs in the most effective, economical, and timely manner. The current draft version of DAO 208-7 prescribes the policy for the

Department's acquisition planning, review and approval process. This policy also provides for review and approval of PBSA requirements to ensure effective management of contracted products and services. Also, the current draft version of Commerce Acquistion Manual, Part 1307 Acquisition Planning, Subpart 1307-7 Acquisition Review Process, prescribes the policy for the Department's acquisition planning, review and approval process.

The Department's performance based service acquisition process involves strategies, methods, and techniques for acquiring services that communicate the desired end result rather than dictating detailed performance processes. It is structured around defining a service requirement in terms of performance objectives and is designed to provide contractors the liberty to determine how to meet those performance objectives. Simply put, it is a process for acquiring what is wanted and leaving how to accomplish it to the contractor. The Department's performance based acquisitions processes incorporate the Seven Steps to Performance Based Service Acquisition:

1. Establish an integrated solutions team
2. Describe the problem that needs solving
3. Examine private-sector and public-sector solutions
4. Develop a performance work statement (PWS) or statement of objectives (SOO)
5. Decide how to measure and manage performance
6. Select the right contractor, and
7. Manage performance

    B. *Communicating roles of and responsibilities of individuals involved in the contract administration process.*

The communication roles of and responsibilities of individuals involved in the contract administration process vary at agency bureaus (buying activities). For Example: The COMMITS NexGen Program Management and Ordering Guide clearly describe the roles and responsibilities of individuals involved in the contact administration process. The Program Manager leads the Program Office with a staff of information technology, contracting, and program professionals. The Contracting Officer is responsible for managing all aspects of the Contract. The Ombudsman is an independent procurement professional responsible for reviewing questions and comments raised by contractors regarding their task order. The Ombudsman ensures that customers fairly and accurately report performance information, and provides general risk management support to the Program Manager. The Customer is the primary liaison with the Program Office. A close relationship between the customer and the program office ensures clear lines of communications, authority, responsibility, and accountability. The Contractor's role is to deliver high quality well managed IT solutions to its Government customers. The table

below provides links to the Department's contract administration policies and guidance issued to encourage the use of performance based service acquisition and their associated web link.

Commerce Acquisition Performance, Policy & Support Performance Management	
Contract Administration POLICY & GUIDANCE	**WEB LINKS**
Contracting Officer Representative (COR) Policy (CAM 1301.670)	http://oam.ocs.doc.gov/docs/COR_Certification_Program_3-31-04.pdf
COR Policy Overview	http://oam.ocs.doc.gov/CAPPS_corPolicyOverview.html
COMMITS NextGen Program Management and Ordering Guide	http://oam.ocs.doc.gov/commits/OrderingGuide/NexGen-Ordering-Guide.pdf

V. Service Categories – *Identify service category (PSC and /or NAIC) where PBA methods are primarily used, and discuss the target achievement level for these services. State service category and PSC where PBA methods are not used in your agency. In accordance with section 1431 of the Service Acquisition Reform Act, agencies should report on contracts or task orders treated as contracts for commercial items using this authority.*

A. *Top 10 PBSAs and target achievement levels.*

PSC	SERVICE CATEGORY	Target
C219	Other Computer Related Services	50%
R425	Other Scientific and Technical Consulting Services	50%
D399	Computer Systems Design Services	50%
D311	ADP Conversion Services	50%
M199	Facilities Support Services	50%
S206	Security Guards and Patrol Services	50%
D399	ADP Services	50%
R427	Weather Reporting Observation Services	50%
D302	ADP Systems Development Services	50%
D301	ADP Facility Operation and Maintenance Services	50%
R699	Wired Telecommunications Carriers	50%

B. *Service category and PSC where PBA methods are not used.*

The DOC Acquisition Community encourages the use of PBSA to the maximum extent practical except for the exclusions identified in FAR 37.102 which are architect-engineering services acquired in accordance with 40 U.S.C. 541-544, construction, utility services and services that are incidental to supply purchases.

VI. **FPDS-NG Reporting Requirement** – *Provide agency PBA results from 2001 – 2005. Include preliminary data for FY 2006 and state the data is retrieved. If the PBA goal was not achieved during any fiscal year, provide a rational including issues and obstacles to achieving the target achievement level. Also, state projected PBA target achievement level increase over the next five years.*

A. *PBA results from 2001 through 2006.*

Agency	FY01	FY02	FY03	FY04	FY05	FY06
DOC	23%	27%	31%	32%	28%	30%

B. *Issues and obstacles to achieving the target.*

Like other Federal Agencies, the department is concerned about the current and future state of the Federal acquisition workforce which is impacted by budgetary resource constraints, procurement reform initiatives and the shrinkage, aging/retiring acquisition work force. These issues and obstacles impacts the Department's ability to achieve its performance goals.

C. *Projected PBA target achievement over the next five years.*

The Department PBA performance goals for the next five years are established at 50% of all service acquisitions measured both in dollars and actions are to be performance based.

Agency	FY07	FY08	FY09	FY10	FY11
DOC	50%	50%	50%	50%	50%

To achieve these goals the DOC Acquisition Community has implemented a performance management tool entitled Balanced Scorecard System (BSC). The BSC is a multidimensional framework for describing, implementing and managing activities at all levels of an organization by linking objectives, initiatives and measures to the

organizations strategy. The BSC provides an enterprise view of an organization's overall performance by integrating financial measures with other key performance indicators related to customer perspectives, internal business processes, and organizational growth, learning and innovation.

VII. **Training** – *Describe how the entire acquisition workforce is trained in the PBA area-include contracting officers, contract specialist, program managers, COR, etc. Also, discuss the type of training (e.g. on-line, classroom training, ect.) and training source (e.g. FAI, DAU, agency or commercial training, etc.)*

OAM incorporated the PBSA Assessment report recommendation to promote PBSA principles in OAM's acquisition workforce training program through OAM sponsored training as well as other aspects of OAM's career management programs. The Department provides and sponsors annual PBSA training to its acquisition workforce community (contract specialists, program managers, contracting officer representatives and project managers). The Department is also committed to providing training and tools needed to define, acquire, and manage service requirements efficiently and effectively.

Training Source	Web Address	Training Type
DOC	n/a	Classroom
Defense Acquisition University	https://acc.dau.mil	Classroom and On-line E-Tools
USDA Graduate School	http://grad.usda.gov	Classroom
ESI International	http://www.esi-intl.com	Classroom
Federal Acquisition Institute	http://view.dau.mil	On-line
Acquisition Solutions, Inc.	http://www.acqsolinc.com	Classroom
DOC COR Certification Program	http://oam.ocs.doc.gov/CAPPS_contracting_officer.html	On-line

VIII. **Agency PBA Recognition Program** – *Agency PBA Recognition Program – Describe the agency award program, if available. If your agency does not have a award program, explain how employees are recognized in this area.*

The DOC Acquisition Community doses not have a PBA award program. However, management is encouraged to recognize employees and teams that successfully develop

and implement PBAs. Agencies are encouraged to nominate for Procurement Executive Award an individual team that effectively used PBSA methods or techniques in Acquisition.

IX. Agency PBA POC – *Agency PBA POC – confirm agency PBA POC by including the name, title, email, and telephone number of the individual.*

The DOC Agency POC is David D. Carter, Procurement Analyst, dcarter@doc.gov, phone number (202) 482-1966.

X. Signature and Date – plan should be signed by CAO or SPE, dated and submitted to jwise@omb.eop.gov

Michael S. Sade
Director and Procurement Executive

DEPARTMENT OF COMMERCE
ACQUISITION COMMUNITY
PERFORMANCE BASED ACQUISITION MANAGEMENT PLAN
FY2006 – FY2011

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Acquisition Planning & Review	http://oam.ocs.doc.gov/CAPPS_performanceManagement.html
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CAM 07-01 Acquisition Plans	http://oam.ocs.doc.gov/docs/CAM_07-01.htm
CAM 15-2 Formal Source Selection Procedures	http://oam.ocs.doc.gov/docs/CAM_15-2.htm
Commerce Information Technology Review Board (CITRB) Policy	http://www.osec.doc.gov/cio/CITRB.HTM
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IV. Acquisition Process – *Discuss how PBAs are planned, awarded, selected and managed. Also, briefly explain how the roles of and responsibilities of individuals involved in the contract administration process are communicated.* (e.g. Contracting Officer Representative (COR) letters).

A. *Discuss how PBAs are planned, awarded, selected and managed.*

The purpose of the Department's acquisition planning, review and approval process is to ensure that the Government meets its acquisition needs in the most effective, economical, and timely manner. The Department's Acquisition Review Board (ARB) oversight process identifies and mitigates risk by discussing alterative approaches to meeting the Departments needs in the (most

effective manner) mode of business manager broker to ensure program success. The purpose of the ARB is to: (i) inform Board members about the proposed acquisition, (ii) provide a dialogue between the Board members and the project team, and (iii) obtain the necessary acquisition approvals. The current draft version of Departmental Administrataive Order (DAO) 208-7 prescribes the policy for the Department's acquisition planning, review and approval process. This policy also provides for review and approval of PBSA requirements to ensure effective management of contracted products and services. Also, the current draft version of Commerce Acquistion Manual, Part 1307 Acquisition Planning, Subpart 1307-7 Acquisition Review Process, prescribes the policy for the Department's acquisition planning, review and approval process.

The Department's performance based service acquisition process involves strategies, methods, and techniques for acquiring services that communicate the desired end result rather than dictating detailed performance processes. It is structured around defining a service requirement in terms of performance objectives and is designed to provide contractors the liberty to determine how to meet those performance objectives. Simply put, it is a process for acquiring what is wanted and leaving how to accomplish it to the contractor. The Department's performance based acquisitions processes incorporate the Seven Steps to Performance Based Service Acquisition:

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COMMITS NextGen Program Management and Ordering Guide	http://oam.ocs.doc.gov/commits/OrderingGuide/NexGen-Ordering-Guide.pdf

V. **Service Categories** – *Identify service category (PSC and /or NAIC) where PBA methods are primarily used, and discuss the target achievement level for these services. State service category and PSC where PBA methods are not used in your agency. In accordance with section 1431 of the Service Acquisition Reform Act, agencies should report on contracts or task orders treated as contracts for commercial items using this authority.*

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M199	Facilities Support Services	40%
S206	Security Guards and Patrol Services	40%
D399	ADP Services	40%
R427	Weather Reporting Observation Services	40%
D302	ADP Systems Development Services	40%
D301	ADP Facility Operation and Maintenance Services	40%
R699	Wired Telecommunications Carriers	40%

B. *Service category and PSC where PBA methods are not used.*

The DOC Acquisition Community encourages the use of PBSA to the maximum extent practical except for the exclusions identified in FAR 37.102 which are architect-engineering services acquired in accordance with 40 U.S.C. 541-544, construction, utility services and services that are incidental to supply purchases.

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A. *PBA results from 2001 through 2006.*

Agency	FY01	FY02	FY03	FY04	FY05	FY06
DOC	23%	27%	31%	32%	28%	30%

B. *Issues and obstacles to achieving the target.*

Like other Federal Agencies, the department's ability to produce results relies heavily on the current and future state of the Federal acquisition workforce. The acquisition workforce is severely impacted by budgetary resource constraints, procurement reform initiatives and the shrinkage, aging/retiring acquisition work force. These issues and obstacles impacts the Department's ability to achieve its performance goals due.

At this time the DOC lacks the staff and resources needed to adequately develop a PBSA Program, promote the program and train the staff (both the contracting and program workforce), to successfully meet the Government and DOC goals.

C. *Projected PBA target achievement over the next five years.*

The Department PBA performance goals for the next five years are established at 40% of all service acquisitions measured both in dollars and actions are to be performance based.

Agency	FY07	FY08	FY09	FY10	FY11
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To achieve these goals the DOC Acquisition Community has implemented a performance management tool entitled Balanced Scorecard System (BSC). The BSC is a multidimensional framework for describing, implementing and managing activities at all levels of an organization by linking objectives, initiatives and measures to the organizations strategy. The BSC provides an enterprise view of an organization's overall performance by integrating financial measures with other key performance indicators related to customer perspectives, internal business processes, and organizational growth, learning and innovation.

VII. Training – *Describe how the entire acquisition workforce is trained in the PBA area- include contracting officers, contract specialist, program managers, COR, etc. Also, discuss the type of training (e.g. on-line, classroom training, ect.) and training source (e.g. FAI, DAU, agency or commercial training, etc.)*

OAM incorporated the PBSA Assessment report recommendation to promote PBSA principles in OAM's acquisition workforce training program through OAM sponsored training as well as other aspects of OAM's career management programs. The Department provides and sponsors annual PBSA training to its acquisition workforce community (contract specialists, program managers, contracting officer representatives and project managers). The Department is also committed to providing training and tools needed to define, acquire, and manage service requirements efficiently and effectively.

Training Source	Web Address	Training Type
DOC	n/a	Classroom
Defense Acquisition University	https://acc.dau.mil	Classroom and On-line E-Tools
USDA Graduate School	http://grad.usda.gov	Classroom
ESI International	http://www.esi-intl.com	Classroom
Federal Acquisition Institute	http://view.dau.mil	On-line
Acquisition Solutions, Inc.	http://www.acqsolinc.com	Classroom
DOC COR Certification Program	http://oam.ocs.doc.gov/CAPPS_contracting_officer.html	On-line

VIII. **Agency PBA Recognition Program** – *Agency PBA Recognition Program – Describe the agency award program, if available. If your agency does not have a award program, explain how employees are recognized in this area.*

The DOC Acquisition Community doses not have a PBA award program. However, management is encouraged to recognize employees and teams that successfully develop and implement PBAs. Agencies are encouraged to nominate for Procurement Executive Award an individual team that effectively used PBSA methods or techniques in Acquisition.

IX. **Agency PBA POC** – *Agency PBA POC – confirm agency PBA POC by including the name, title, email, and telephone number of the individual.*

The DOC Agency POC is David D. Carter, Procurement Analyst, dcarter@doc.gov, phone number (202) 482-1966.

X. Signature and Date – plan should be signed by CAO or SPE, dated and submitted to jwise@omb.eop.gov

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