Area Distribution Center PWS Team
Lessons Learned
3/18/03

Team Start-up

- Include union up front as team members
- If your solicitation will include IT services or systems, include IT as a partner or team member if possible.
- Ensure team members can commit for the entire project
- Obtain consolidated space if possible
- May want to have PCs that are above baseline in terms of memory and storage; we ran out of both regularly and locked up our machines; files can be quite large!
- Get everyone into training very early in the process (1st week if you can)
- Involve HR early on. They can ensure your PWS timeframes meet with requirements for employee notifications, RIF schedules, etc. You should also be recommending/working mitigation strategies such as hiring fill-behinds through temps instead of perms.
- Ensure Procurement/Contracts participation from the start. Their expertise is needed throughout. Although it is very difficult to dedicate a full-time procurement person (they generally don't get any extra staffing to deal with all this extra work!), it is important that they be in on the initial meetings to set direction, working relationships and methods, and determine checkpoints.
- Create a scoping document and keep it up to date as you gather data. Your scoping document shows what processes and positions are in or out of scope in an office. At first it sounds easy. An entire function may be listed as not inherently governmental, but you may find a handful of positions, or even 1 or 2, that are placed in one office—but relate to a totally different process or function or contain duties that make it inherently governmental.
- Make sure you have administrative support on the team. There was a lot of travel, documentation, etc.
- Use full-time dedicated staff on the team.
- Select team members who are committed to a fair and open competition and making the best use of taxpayer dollars.
- We developed a contact point in General Legal Services for all our questions and met with him early on to explain a list of potential issues. We provided our written list before the first meeting. Having a single point of contact, familiar with our efforts and how the issues interrelated, really helped reduce work on both sides. We received excellent support throughout the process.
- Seek coordination points up front for impacted/involved organizations. Some functions to consider- GLS, Disclosure, AWSS, Embedded HR, Strategic HR, IT, Communications.

Project Management

- We kept a project timeline and revised it often. It was posted for our team and on the intranet.
- The PWS team, Strategic HR, Embedded HR, and AWSS should partner and prep together for union briefings. We took the lead in preparing the final PowerPoint slides, but received draft input from the others and outlined the presentations together to ensure consistent message, tone, and unified plans.
- The PWS team should assist Strategic HR, Embedded HR, and AWSS on the HR strategy. After all the interviews, surveys, documenting of work, etc. the PWS has a lot of knowledge about what the concerns are.
- Ensure you have budget contacts early on who can work with you on the very nebulous

future and the projections you'll need to make for out-year budget.

- Ensure budget projections are kept confidential so they don't become the "target' numbers.

Human Resources

- Two areas on the Department of Labor web site were particularly helpful in preparing the list of labor categories required for the final solicitation:
  - http://www.dol.gov/esa/regs/compliance/whd/wage/main.htm (an index of all the labor categories and descriptions on-line, along with Frequently Asked Questions and Answers) and
  - http://www.dol.gov/esa/regs/compliance/whd/web/index.htm (an index that compares GS levels and names to the standard labor categories)
- Start preparing the labor categories several months ahead, since some required labor categories might not be covered by DOL standard categories (a number of ours were not).

Data Gathering

- Develop your work breakdown structure and agree on it --for all work to be covered in the PWS—first thing! We brainstormed together. This set the parameters and served as a checklist for everything we did.
- Make sure your surveys are accessible and that you have made accommodations for interviews with persons with disabilities
- Use electronic surveys when possible and send out ahead of the interview process. Allow time for people to respond before you interview. Allow for paper responses, but encourage electronic.
- Ensure union review of surveys before they go out.
- Provide employees plenty of opportunity to participate in data gathering. We selected key positions for interviews, but allowed anyone who wanted to be interviewed to do so. Blank surveys were placed in the cafeteria and in the designated smoking areas.
- We conducted hundreds of interviews and for some, a single individual held the key to a particular type of workload. Being thorough up front will save time later on.
- Use an organizational email box to receive survey replies and data.
- Don't assume the inventories in the electronic systems are correct. We experienced major problems. Pages and pages of items that had been excessed or transferred were listed, items left off, items listed in incorrect categories, incomplete information. Make sure the inventory folks know that you'll be back—you'll need inventories totally up to date for the RFI, RFP, and the final transition.
- Consider doing separate management and employee surveys. Management surveys, for example, could ask for summary workload data and overall equipment used in a section, as opposed to having each employee report on those items (and possibly having duplications or things left out).
- Obtain shared file space on a server to store of the mounds of data you collect. Make sure it is secure (password/id). Per GLS, the MEO cannot access this data store!
- Select one team member to serve as your documentation/data lead. Everyone fed information and files to that one person who categorized the information and ensured it was posted to the shared drive for all to see and use. We placed an icon on each computer desktop to get into our "electronic library" quickly. The electronic library was used every day, all day!
- When interviewing, be sure to consider audience, even in attire. In the warehouse interviews we asked the vendor staff not to wear ties or dresses and dressed according to the norm in the area being examined.
- Keep a group "to do" list. Share often. Eliminates duplication of effort and several folks

calling the same person for a piece of information.

- Put all requests in writing. Even when you ask originally by phone or voice mail, follow up with an email to clarify and reaffirm and give specific dates on when you want data.
- If you have trouble selecting a NAICS code, contact Census. They have a very responsive group that will give you advice.
- Say, “thank you” every time-- to everyone who provides information. You will become a pest during this process.
- We found square footage on a lease that did not match actual square footage. Anything we are offering as GFP should be checked and rechecked for accurate inventory and description.

Market Research

- We posted our market research site visits and notes on our Virtual Office, along with the final report and found ourselves going back to the information to pull out ideas.
- Make contacts well in advance, in writing.

Writing the PWS

- We used a virtual office concept on the Internet and loved it. Everyone on the team, including the support contractor was able to access the latest version of the PWS (secure web site). One person, in our case, vendor support staff person, kept up version control. Each team member acted as “lead” for specific sections of the PWS or technical exhibits. We could work from home or the road. Team members who were from the field had easy access.
- At the end of development we sent all files to one person for consolidation and review before sending to the contractor weekly.
- Have someone, contractor and/or team member who is really, really advanced in Word, not just charts and inserting graphics, but structured documents, linking numerous files together and organization.
- We numbered our work breakdown structure and used that as the outline for the PWS numbering. The workload and other technical exhibits also reflected that work breakdown structure. For example, Order Entry might be PWS Section 1.1. Related order entry workload, mandatory guidance, and reference materials in the technical exhibits also reflected that WBS numbering. This eliminates having a lot of rework as you move things around.
- Keep a comment/questions log and retain. We kept an electronic log of all comments and questions. The chart included who made the comment, date received, date resolved or status, who was assigned to resolve, date closed, relevant section of the PWS. Otherwise, you may find yourselves losing open issues or revisiting issues that were closed.
- Include contingency planning as part of the PWS.
- Never use passive voice.
- Have one designated person as keeper of the acronyms and glossary. Maintain a common glossary of terms/acronyms and add continuously.
- If you are asking for reports, consider a few standard reports, supplemented by a report writing system and the database files, rather than just asking for a certain layout and certain reports. You are sure to have changes over the years of the performance period.
- Include clauses to cover damaged goods or GFP.
- We used standardized electronic templates for everything, PWS, QASP, and Technical Exhibits. Standardized headers and footers, including date stamp were included in each template. Fonts were standard as well. We used outlining functions in Word and kept them simple. Ex. Heading 1= 1. Heading 2 =1.1, Heading 3= 1.1.1.
- It is critical that you date stamp every file. Late in the process, when changes were flying

(typos, renumbering, moving sections around), we began time stamping every file.

- If there has been a previous A-76 type effort or other contracting out, learn from that. We interviewed someone who was involved in an A-76 for our work over 10 years ago and still found the interview extremely useful. Lessons learned after unsuccessful contracting can fill "holes" in your PWS. Ex. contractors were previously paid for each order filled and orders were split to increase profits.

Writing the QASP

- Ensure that your QASP takes into account the function's current balanced measures. When you examine the current balanced measures you may find that they are based on the current process (include or rely on "how") and may not be appropriate for your QASP.
- We relied heavily on industry measures for the QASP. In our benchmarking, this was a primary emphasis. We found that some of the currently used measures in-house were not necessarily what or how industry generally measures.

RFI

- As you issue the RFI (same day) have ready a group of email messages. Create a template message to go to all impacted execs (not only the line management over the area under study, but IT, embedded HR, Strategic HR, AWSS, IT, related/impacted functions, GLS, Disclosure). The message should ask for their review of the RFI and comments. We also developed a short checklist for each function that highlighted 3-5 specific sections of the RFI of interest to their function and asked for feedback.
- Market your RFI/RFP. You put a lot of work in it! Coordinate with and get approval from Contracts on timing and what is allowable. We sent standard email to numerous associations and companies with links to the RFI and got some responses almost immediately.
- Create an organizational email box to receive comments. Limit the administrative rights so only one person can delete, etc., but all your team can see.
- We developed a separate comment log for the RFI and a cover sheet that listed all the functions we had sent an email to and asked to review specific sections. The list included all individuals and other functions that responded. This one page summary list acted as a cover sheet for the comment log and jogged our memory on which functions we needed to follow up with. Hey, this function has not responded—time for a nudge! Comment logs were a great way to document how we closed out issues and what changes were made to the PWS.
- We issued a very short guide with tips on how to review the RFI.
- We met with Disclosure, GLS, and Privacy together to discuss issues and found it easier to get all the appropriate input and discussion at one time.

Transition

- We began transition activities during the development of the PWS. For example-- meetings with HR, CMLC, EAP, and OD professionals, Workplace Violence training for managers, etc.
- We keep a separate log for transition issues.