



DEPARTMENT OF VETERANS AFFAIRS
Deputy Assistant Secretary for Acquisition and Logistics
Washington, DC 20420

IL 049-07-10
August 13, 2007

OFFICE OF ACQUISITION AND LOGISTICS INFORMATION LETTER

TO: Under Secretaries for Health, Benefits, and Memorial Affairs; Assistant Secretary for Management; Executive-In-Charge, Office of Construction and Facilities Management; Veterans Integrated Service Network Directors; Directors, VA Medical Center Activities, Domiciliary, Outpatient Clinics, Medical and Regional Office Centers, and Regional Offices; Directors, Denver Acquisition and Logistics Center, VA Corporate Franchise Datacenter, Records Management Center, VBA Benefits Delivery Centers, and the VA Health Administration Center; and the Executive Director and Chief Operating Officer, VA National Acquisition Center

ATTN: Head of the Contracting Activity
All VA Contracting Officers

SUBJ: Advisory and Assistance (A&A) Services

1. This information letter (IL) replaces IL 049-04-08, dated April 8, 2004, on Advisory and Assistance (A&A) Services. The purpose of this IL is to provide information on processing information technology (IT) A&A requests and guidance on submitting all other A&A requests for actions below the \$1,000,000 threshold and for actions of \$1,000,000 and above.
2. This revised procedure establishes a \$1,000,000 threshold per request for the Secretary or Deputy Secretary's approval (Attachment 1). Therefore, all A&A requests under \$1,000,000 no longer require review by the Secretary or Deputy Secretary.
3. All IT A&A requests under \$1,000,000 are required to be submitted to the Office of Acquisition and Logistics (OA&L) monthly via the IT tracking system.
4. All VHA, NCA, VBA, Central Office activities and field offices are required to submit monthly reports on all non IT A&A requests under \$1,000,000 (Attachment 2) to OA&L's Office of Acquisition Operations Service (049A3B) to the attention of Tonya Snipes. Ms. Snipes can be reached at 202-273-5739. The approval for these requirements would be at the Deputy Under Secretary, Deputy Assistant Secretary, or equivalent staff office level.

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5. The following process should be followed by all VA organizations for IT A&A requests of \$1,000,000 and above:

a. All IT A&A requests should be submitted using the appropriate electronic document management system and the IT tracking system. The Office of Information and Technology (OI&T) will create an electronic folder for any Veterans Health Administration (VHA) facility requests that are not already in the electronic document management system. For information on how to obtain access to the IT tracking system, responsible officials within each VA organization should contact VA by sending an e-mail to cindy.harpine@va.gov.

b. OI&T will conduct technical reviews for consistency with the department's enterprise architecture framework and telecommunications and cyber security requirements.

c. Once the OI&T review is complete, that office will recommend concurrence to OA&L and make an assignment to OA&L.

d. OA&L will conduct the review required by the Deputy Secretary's office and prepare the approval memorandum for the signature of the Assistant Secretary for Management (004) and the Deputy Secretary. The memorandum will include the electronic folder number and IT tracking number.

e. The Office of the Assistant Secretary for Management will forward the request to the Office of the Executive Secretariat (001B).

f. Upon review by the Deputy Secretary, the Office of the Executive Secretariat will scan the signed approval memorandum into WebCIMS and return the package to OA&L.

g. At this point, O&IT will release the IT A&A from the IT tracking system, and VHA will add the approval memorandum to the IT tracking system to enable VA field activities access to the approval document.

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6. A&A requests in excess of \$1,000,000 not pertaining to IT should be submitted as follows:

a. All VHA non-IT A&A requests from Central Office organizations and field activities must be submitted to the VHA Office of Clinical Logistics (10F) in accordance with VHA guidance. That office will coordinate the review process with OA&L. VHA will return the Deputy Secretary's final decision to the submitting organization.

b. For other Central Office organizations and all other field activities, non-IT A&A requests should be submitted to OA&L. The preferred method of submission is through an assignment in the appropriate electronic document management system. If that is not available, please submit via e-mail to 049Advisory.Contracts@va.gov. OA&L will prepare the approval memorandum to the Deputy Secretary for signature of the Assistant Secretary for Management and will return the Deputy Secretary's final decision to the submitting organization.

7. In addition to the above changes, modifications have been made to the required justification statement for A&A requests. References to the approval of or review by the Deputy Secretary on the justification statement for A&A requests have been changed as appropriate (Attachment 3). Other changes include:

a. Paragraph 3. When providing the estimated total cost of a contract request, also include the hourly rate of key personnel and the estimated amount and/or percentage of overhead in the contract. If hourly rates were not used to compute the cost, you must explain how the cost was determined.

b. Paragraph 7. A new paragraph was added requesting a point of contact name and telephone number.

8. Federal Acquisition Regulation (FAR) Part 2 provides the definition for A&A (Attachment 4). FAR Subpart 37.2 provides policies and procedures for the use of this type of contract. VA Acquisition Regulation Subpart 837.2 provides additional guidance. These references must be used as a guide in your determination for use of A&A services contracts.

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9. On a monthly basis, OA&L will provide a report to the Assistant Secretary for Management. The report will contain a listing of all A&A requests reviewed during the month.

10. Questions regarding this process should be directed to Tonya Snipes, Acquisition Operations Service (049A3), at (202) 273-5739.

/s/C. Ford Heard
Director
Acquisition Resources Service

Attachments: 4

Distribution: RPC 7029

**Department of
Veterans Affairs****Memorandum**

Date: May 25, 2007

From: Assistant Secretary for Management (004)

Subj: Proposed Modification to Advisory and Assistance Contract Approval Process (WebCIMS 371442)

To: Deputy Secretary (001)

1. On February 6, 2004, then-Secretary Principi established a requirement for the Secretary or Deputy Secretary to approve all proposed advisory and assistance (A&A) contracts at or above \$100,000 prior to contract award. To meet the current needs of the Department, I recommend raising that threshold and reassigning approval authority as follows:

a. A&A contracts of \$1 million or more will still require your approval before the contract can be awarded. Such contract requests must first be approved by the respective Under Secretary, Assistant Secretary, or staff office Director. The Office of Management will then forward the contract requests to your office for review.

b. A&A contracts valued between \$100,000 and \$999,999 will require approval by the respective Deputy Under Secretary, Deputy Assistant Secretary, or staff office Director before the contract can be awarded.

2. To ensure proper tracking and oversight, the Administrations and staff offices will send a monthly report to the Office of Acquisitions, listing every A&A contract expenditure up to \$1 million. The Office of Management will consolidate this information and prepare a monthly report for your review.

3. If your staff have any questions, they may contact Mr. Efrain J. Fernandez, Associate Deputy Assistant Secretary for Acquisitions, at 273-6047.

/s/Robert J. Henke

Approved:

/s/Gordon H. Mansfield
Gordon H. Mansfield
Deputy Secretary

6/14/07
Date

REQUEST INFORMATION				ESTIMATED AWARD		TOTAL ESTIMATED AWARD		APPROVED		AWARD DATE	
DATE RECEIVED	WebCIMS/D CMS	REQUESTING OFFICE	DESCRIPTION	BASE YEAR	OPTION YEARS	\$100K to \$999K	OVER \$1M	BY	DATE	ESTIMATED	ACTUAL
FISCAL YEAR TO DATE GRAND TOTAL				\$0	\$0	\$0	\$0				

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Attachment 3

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Advisory and Assistance Contracts

Justification

The decision package must address each of the following areas;

1. Description of the problem or project, including the results or end product sought.
2. Reason(s) outside assistance is sought.
3. Estimated cost of the contract. Include the hourly rate of key contract personnel and the estimated amount and/or percentage of overhead in the contract. If hourly rates were not used, please indicate how the estimated cost was determined.
4. Copy of the proposed statement of work (attach as a separate document).
5. Methodology by which contractor performance will be monitored including how departures from the original contract specifications will be documented and approved (deviations over 10 percent require the approval of the Deputy Secretary).
6. Methodology by which the final product will be evaluated and by whom.
7. Point of contact (name and telephone number).

Advisory and Assistance Definition

Federal Acquisition Regulation (FAR), Section 2.101, Definitions

"Advisory and assistance services" means those services provided under contract by nongovernmental sources to support or improve: organizational policy development; decision-making; management and administration; program and/or project management and administration; or R&D activities. It can also mean the furnishing of professional advice or assistance rendered to improve the effectiveness of Federal management processes or procedures (including those of an engineering and technical nature). In rendering the foregoing services, outputs may take the form of information, advice, opinions, alternatives, analyses, evaluations, recommendations, training and the day-to-day aid of support personnel needed for the successful performance of ongoing Federal operations.

All advisory and assistance services are classified in one of the following definitional subdivisions:

(1) Management and professional support services, *i.e.*, contractual services that provide assistance, advice or training for the efficient and effective management and operation of organizations, activities (including management and support services for R&D activities), or systems. These services are normally closely related to the basic responsibilities and mission of the agency originating the requirement for the acquisition of services by contract. Included are efforts that support or contribute to improved organization of program management, logistics management, project monitoring and reporting, data collection, budgeting, accounting, performance auditing, and administrative technical support for conferences and training programs.

(2) Studies, analyses and evaluations, *i.e.*, contracted services that provide organized, analytical assessments/evaluations in support of policy development, decision-making, management, or administration. Included are studies in support of R&D activities. Also included are acquisitions of models, methodologies, and related software supporting studies, analyses or evaluations.

(3) Engineering and technical services, *i.e.*, contractual services used to support the program office during the acquisition cycle by providing such services as systems engineering and technical direction (see 9.505-1(b)) to ensure the effective operation and maintenance of a weapon system or major system as defined in OMB Circular No. A-109 or to provide direct support of a weapon system that is essential to research, development, production, operation or maintenance of the system

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Attachment 4

Additional guidance may be found at FAR subpart 37.2 and Veterans Affairs Acquisition Regulation (VAAR), Subpart 837.2.