

Supplemental Handout for
*Using GSA Schedules for Professional
Services*

March 25, 2009 Webinar

- A. List of GSA Multiple Award Schedules
- B. Some Service SINS & Schedules
- C. NAICS Codes Cross-Referenced to Service Schedules
- D. Why Contracting Officers Use GSA MAS
- E. Extract from “GSA Order Checklist”
- F. Think Simplified (Not FAR Part 15)
- G. Resources for Additional Information & Training

Handout A
List of GSA Multiple Award Schedules (48)
2/25/2009

00CORP THE CONSOLIDATED SCHEDULE
00JWOD NIB/NISH PRODUCTS
03FAC FACILITIES MAINTENANCE AND MANAGEMENT
23 V VEHICULAR MULTIPLE AWARD SCHEDULE (VMAS)
26 I TIRES, PNEUMATIC (NEW), FOR PASSENGER, LIGHT TRUCK, MEDIUM TRUCK,
AND BUS, AND RETREAD SERVICES
36 THE OFFICE, IMAGING AND DOCUMENT SOLUTION
48 TRANSPORTATION, DELIVERY AND RELOCATION SOLUTIONS
51 V HARDWARE SUPERSTORE
56 BUILDINGS AND BUILDING MATERIALS/INDUSTRIAL SERVICES AND SUPPLIES
58 I PROFESSIONAL AUDIO/VIDEO, TELEMETRY/TRACKING,
RECORDING/REPRODUCING AND SIGNAL DATA SOLUTIONS
65 I B PHARMACEUTICALS AND DRUGS
65 II A MEDICAL EQUIPMENT AND SUPPLIES
65 II C DENTAL EQUIPMENT AND SUPPLIES
65 II F PATIENT MOBILITY DEVICES
65 V A X-RAY EQUIPMENT AND SUPPLIES
65 VII INVITRO DIAGNOSTICS, REAGENTS, TEST KITS AND TEST SETS
66 SCIENTIFIC EQUIPMENT & SERVICES
66 III CLINICAL ANALYZERS, LABORATORY, COST-PER-TEST
67 PHOTOGRAPHIC EQUIPMENT - CAMERAS, PHOTOGRAPHIC PRINTERS AND
RELATED SUPPLIES & SERVICES (DIGITAL AND FILM-BASED)
69 TRAINING AIDS & DEVICES, INSTRUCTOR-LED TRAINING; COURSE
DEVELOPMENT; TEST ADMINISTRATION
70 GENERAL PURPOSE COMMERCIAL INFORMATION TECHNOLOGY EQUIPMENT,
SOFTWARE, AND SERVICES
71 I OFFICE FURNITURE
71 II HOUSEHOLD AND QUARTERS FURNITURE
71 II H PACKAGED FURNITURE
71 II K COMPREHENSIVE FURNITURE MANAGEMENT SERVICES (CFMS)
71 III SPECIAL USE FURNITURE
71 III E MISCELLANEOUS FURNITURE
72 I A FLOOR COVERINGS
72 II FURNISHINGS
73 FOOD SERVICE, HOSPITALITY, CLEANING EQUIPMENT AND SUPPLIES,

Handout A
List of GSA Multiple Award Schedules (48)
2/25/2009

- CHEMICALS AND SERVICES
- 75 OFFICE PRODUCTS/SUPPLIES AND SERVICES AND NEW PRODUCTS/TECHNOLOGY
 - 76 PUBLICATION MEDIA
 - 78 SPORTS, PROMOTIONAL, OUTDOOR, RECREATION, TROPHIES AND SIGNS
 - 81 I B SHIPPING, PACKAGING AND PACKING SUPPLIES
 - 84 TOTAL SOLUTIONS FOR LAW ENFORCEMENT, SECURITY, FACILITIES MANAGEMENT, FIRE, RESCUE, CLOTHING, MARINE CRAFT AND EMERGENCY/DISASTER RESPONSE
 - 520 FINANCIAL AND BUSINESS SOLUTIONS (FABS)
[See also GSA BPAs for Credit Monitoring Services and Independent Risk Analysis Services]
 - 541 ADVERTISING & INTEGRATED MARKETING SOLUTIONS (AIMS)
 - 599 TRAVEL SERVICES SOLUTIONS
[See also GSA BPAs for Emergency Lodging Services]
 - 621 I PROFESSIONAL AND ALLIED HEALTHCARE STAFFING SERVICES
 - 621 II MEDICAL LABORATORY TESTING AND ANALYSIS SERVICES
 - 736 TEMPORARY ADMINISTRATIVE AND PROFESSIONAL STAFFING (TAPS)
 - 738 II LANGUAGE SERVICES
 - 738 X HUMAN RESOURCES & EQUAL EMPLOYMENT OPPORTUNITY SERVICES
 - 751 LEASING OF AUTOMOBILES AND LIGHT TRUCKS
 - 871 PROFESSIONAL ENGINEERING SERVICES
 - 874 MISSION ORIENTED BUSINESS INTEGRATED SERVICES (MOBIS)
 - 874 V LOGISTICS WORLDWIDE (LOGWORLD)
 - 899 ENVIRONMENTAL SERVICES

To see the current list of all GSA Schedules, go to <http://www.gsaelibrary.gsa.gov> and click on "View schedule contracts" from the menu bar on the right side of the page.

Handout B: Some Services SINs on GSA Multiple Award Schedules¹

For more information on these Schedules/SINs, see:

<http://www.gsaelibrary.gsa.gov>

then select the Schedule number (03FAC, 899, etc.) from the *Quick Schedule* pull-down menu in the upper right corner of the screen.

(Latest FedBizOps RFP posting date is shown after Schedule name.)

(00CORP) Consolidated Schedule (6/21/2007) #5

<http://www.gsa.gov/consolidated>

All Schedules below indicated with an asterisk (*) are part of the Consolidated Schedule

***(03FAC) Facilities Maintenance and Management (7/30/2008) #11**

<http://www.gsa.gov/cfmhservices>

- 003-97 Ancillary Repair and Alterations
- 371-1 Grounds Maintenance
- 371-2 Tree Planting/Trimming/Removal
- 371-3 Pest Control
- 371-4 Cemetery Maintenance
- 541-1 Independent Elevator Inspection Services
- 561-1 Fire Alarm System Preventive Maintenance & Repair Services
- 561-2 Water Based Fire Suppression System Preventive Maintenance & Repair Services
- 801-1 Surface Preparation
- 801-2 Application of Chemical Compounds
- 811-1 Elevator and Escalator Preventative Maintenance
- 811-2 Complete Facilities Maintenance
- 811-3 Complete Facilities Management
- 811-4 Electrical, and All Utility Services - Limited to Facility Maintenance
- 811-5 Refrigeration, Heating, Ventilation and Air Condition HVAC Maintenance
- 811-6 Facilities Maintenance and Management Consulting
- 812-1 Dry Docking Services
- 812-2 Dockside Maintenance and Repair Services
- 871-200 Energy Management Program Support
- 871-201 Energy Audit Services
- 871-202 Energy Management Planning and Strategies
- 871-203 Training on Energy Management
- 871-205 Energy Program Support Services
- 871-206 Building Commissioning Services
- 871-207 Energy Audit Services
- 871-208 Resource Efficiency Management
- 871-209 Innovations in Energy
- 871-210 Water Conservation

***(36) Office, Imaging, and Document Solutions (12/5/2008) #17**

<http://www.gsa.gov/furniture> then select 36

- 51-501 Needs Assessment and Analysis Services
- 51-503 Education and Training Support Services
- 51-504 Records Management Services
- 51-505 Document Production On-site and Off-site Services

¹ david.clemens@gsa.gov, updated 2/26/2009. List does not include product SINs or "other"/ancillary (e.g., installation) services tied to Schedule products/systems. Any separate SINs for "Other Direct Costs," "Support Products," "New Services," BPAs, or maintenance service for product SINs are also omitted.

51-506 Document Conversion Services
51-507 Destruction Services
51-508 Litigation Support Services
51-509 Network Connectivity Support Services
733-1 Mail Room Management Support Services
733-2 Presort Mail
733-3 Miscellaneous Mail Services
733-4 List Management Services
733-5 Mailroom Ergonomic Analysis Services
733-6 Mail Screening and Inspection Services

(48) Transportation, Delivery, and Relocation Solutions (TDRS) (1/23/2008) #4

<http://www.gsa.gov/tdrs>

411-1 Ground Passenger Transportation Services
411-2 Rental Supplemental Vehicle Program
411-3 Transportation Consulting Services
451-1 Express Small Package and Express Heavyweight Delivery Services
451-2 Ground Small Package Delivery Services
451-3 Local Courier Delivery Services (*Small Businesses*)
653-1 Relocation Services Package
653-3 Relocation Software and Technology Tools
653-4 Additional [Relocation] Services
653-5 Agency Customization Services
653-7 Move Management Services
653-8 Office Relocation
653-9 Corporate Housing Lodging Services

(58 I) Professional Audio/Visual, Telemetry/Tracking, Recording/Reproducing and Signal Data Solutions (10/24/2008) #8

<http://www.gsa.gov/furniture> then 58 I

58-8-Professional Audio/Video Assessment, Design and Integration
58-9 Professional Audio/Video Production (See also SIN 541-4B)
58-10 Professional Audio/Video Services NEC

***(69) Training Aids & Devices, Instructor Led Training, Course Development, and Test Administration (4/21/2008) #3**

27-400 Instructor Led Training and Web Based Training
27-500 Course Development and Test Administration
27-600 Acquisition Training for 1102's

***(70) General Purpose Commercial Information Technology Equipment, Software, and Services (6/6/2008) #22**

<http://www.gsa.gov/itcenter>

132-50 Classroom Training
132-51 Information Technology Professional Services
132-52 Electronic Commerce Services
132-53 Wireless Services
132-60 Authentication Products and Services/Access Certificates for Electronic Services (ACES)
132-61 Public Key Infrastructure (PKI) Shared Service Provider (SSP)
132-62 HSPD-12 Product and Service Components

(84) Total Solutions for Law Enforcement, Security, Facilities Management, Fire, Rescue, Clothing, Marine Craft, and Emergency/Disaster Response (10/3/2008) #11

<http://www.gsa.gov/firesecurity>

246-52 Professional Security/Facility Management Services
246-54 Protective Service Occupations
246-60-1 Security Systems Integration & Design Services
246-60-2 Security Management and Support Services
246-60-3 Security System Life Cycle Support

***(520) Financial and Business Solutions (FABS) (4/7/2008) #7**

<http://www.gsa.gov/fabs>

520-1 Program Financial Advisor
520-2 Transaction Specialist
520-3 Due Diligence & Support Services
520-4 Debt Collection
520-5 Loan Servicing & Asset Management
520-6 Professional Legal Services
520-7 Financial & Performance Audits
520-8 Complementary Audit Services
520-9 Recovery Audits
520-10 Transportation Audits (*Small Businesses*)
520-11 Accounting
520-12 Budgeting
520-13 Complementary Financial Management Services
520-14 Audit & Financial Training Services (*Small Businesses*)
520-15 Outsourcing Recurring Commercial Activities for Financial Management Services
520-16 Business Information Services
520-17 Risk Assessment and Mitigation Services
520-18 Independent Risk Analysis
520-19 Data Breach Analysis
520-20 Comprehensive Protection Solutions
520-21 Program Management Services

***(541) Advertising and Integrated Marketing Solutions (AIMS) (5/8/2008) #6**

<http://www.gsa.gov/aim>

541-1 Advertising Services
541-2 Public Relations Services
541-3 Web Based Marketing Services (*Small Businesses*)
541-4A Market Research and Analysis
541-4B Video/Film Production
541-4C Exhibit Design and Implementation Services
541-4D Conference, Events and Tradeshow Planning Services (*Small Businesses*)
541-4E Commercial Photography Services (*Small Businesses*)
541-4F Commercial Art and Graphic Design Services (*Small Businesses*)
541-5 Integrated Marketing Services

(599) Travel Services Solutions (TSS) (3/25/2004, Amend 8/22/2007)

<http://www.gsa.gov/tss>

599-1 Travel Consultant Services
599-2 Travel Agent Services/Travel Management Center Services
599-3 Lodging Negotiations & Management Services
599-4 Air Charter Services – Owner Operated
599-5 Air Charter Services – Brokers

(736) Temporary Administrative and Professional Staffing (4/24/2008) #11 (*Schedule is Reserved for Small Businesses Only*)

<http://www.gsa.gov/tempervices>

736-1 Administrative Support and Clerical Occupations

736-2 Automatic Data Processing Occupations
736-3 General Service and Support
736-4 Information and Arts Occupations (including Miscellaneous Occupations)
736-5 Technical and Professional Occupations

***(738 II) Language Services (9/16/2008) #7**

<http://www.gsa.gov/language>

382-1 Translation Services
382-2 Interpretation Services
382-3 Training & Educational Materials
382-4 Comprehensive Linguistic Analytic Support Services (CLASS)
382-5 Services for the Visual and Hearing Impaired

***(738X) Human Resources and Equal Opportunity Services (9/10/2008) #13**

<http://www.gsa.gov/hreeo>

595-21 Human Resources Services
595-22 Private Shared Service Center for Core HR Requirements (*closed to new offers*)
595-25 EEO Services
595-26 Private Shared Service Center for Non-Core HR Requirements (*closed to new offers*)
595-27 HR Support: Pre-Employment Background Investigations
595-28 HR Support: Social Services

***(871) Professional Engineering Services (PES) (4/17/2008) #11**

<http://www.gsa.gov/eng>

871-1 Strategic Planning for Technology Programs/Activities
871-2 Concept Development and Requirements Analysis
871-3 System Design, Engineering and Integration
871-4 Test and Evaluation
871-5 Integrated Logistics Support
871-6 Acquisition and Life Cycle Management
871-7 Construction Management

***(874) Mission Oriented Business Integrated Services (MOBIS) (4/18/2008) #13**

<http://www.gsa.gov/mobis>

874-1 Consulting Services
874-2 Facilitation Services
874-3 Survey Services
874-4 Training Services
874-5 Support Products
874-6 Acquisition Management Support
874-7 Program and Project Management Services

***(874 V) Logistics Worldwide (LOGWORLD) (4/22/2008) #5**

<http://www.gsa.gov/logworld>

874-501 Supply and Value Chain Management
874-503 Distribution and Transportation Logistics Services
874-504 Deployment Logistics
874-505 Logistics Training Services
874-506 Support Products
874-507 Operations & Maintenance Logistics Management and Support Services
874-597 Ancillary Repair and Alterations

***(899) Environmental Services (4/22/2008) #11**

<http://www.gsa.gov/environmentalservices>

- 899-1 Environmental Planning Services & Documentation
- 899-2 Environmental Compliance Services
- 899-3 Environmental Occupational Training Services
- 899-4 Waste Management Services
- 899-5 Reclamation, Recycling and Disposal Services
- 899-6 Environmental Advisory Services
- 899-7 Geographic Information Services
- 899-8 Remediation Services

Handout C: NAICS Codes Cross-Referenced to GSA Schedules *with Services*¹

NAICS (Number)	NAICS (Title)	GSA Schedule Number(s) and Schedule Name(s)
236220	Commercial and Institutional Building Construction (part)	871 Professional Engineering Services (PES) (871-7)
238210	Electrical Contractors	03 FAC Facilities Maintenance and Management (811-5)
238220	Plumbing, Heating, and Air-Conditioning Contractors	03 FAC Facilities Maintenance and Management (811-4, 871-210)
332812	Metal Coating, Engraving (except Jewelry and Silverware), and Allied Services to Manufacturers	03 FAC Facilities Maintenance and Management (811-1, 800-1000, 801-2)
336611	Ship Building and Repairing	03 FAC Facilities Maintenance and Management (812-2)
481112	Scheduled Freight Air Transportation	48 Transportation, Delivery and Relocation Services (451-2)
484210	Used Household and Office Goods Moving	48 Transportation, Delivery and Relocation Services (451-1, 653-1, -3, -4, -5, -7, -8)
481211	Nonscheduled Chartered Passenger Air Transportation	599 (599-4, -5)
481219	Other Nonscheduled Air Transportation	599 (599-4, -5)
485320	Driver/Limousine Service	48 Transportation, Delivery and Relocation Services (411-1)
485999	All Other Transit and Ground Passenger Transportation	48 Transportation, Delivery and Relocation Services (411-1)
492210	Local Messengers and Local Delivery	48 Transportation, Delivery and Relocation Services (451-3)
511199	All Other Publishers	70 Information Technology (132-51, -52)
512110	Motion Picture and Video Production	541 Advertising & Integrated Marketing Solutions (AIMS) (541-4B)
516110	Internet Publishers and Broadcasting	70 Information Technology (132-52)
517110	Wired Telecommunications Carriers	70 Information Technology (132-52)
517211	Paging	70 Information Technology (132-53)
517212	Cellular and Other Wireless Telecommunications	70 Information Technology (132-53)
517310	Telecommunications Resellers	70 Information Technology (132-52, -53)
517410	Satellite Telecommunications	70 Information Technology (132-52, -53)
517910	Other Telecommunications	70 Information Technology (132-52, -53)

¹ Updated 2/25/2009 by david.clemens@gsa.gov . Taken from current GSA FSS MAS solicitations including service SINs as shown on Handout B.

518111	Internet Service Providers	70 Information Technology (132-52)
518112	Web Search Portals	70 Information Technology (132-52)
518210	Data Processing, Hosting, and Related Services	36 Office, Imaging, and Document Solutions (51-506) 70 Information Technology (132-52)
522310	Mortgage and Nonmortgage Loan Brokers	520 Financial and Business Solutions (FABS) (520-1, -2, -5)
523110	Investment Banking and Securities Dealing	520 Financial and Business Solutions (FABS) (520-1, -2)
524292	Third Party Administration of Insurance and Pension Funds	520 Financial and Business Solutions (FABS) (520-15)
525990	Other Financial Vehicles	520 Financial and Business Solutions (FABS) (520-99)
531110	Lessors of Residential Buildings and Dwellings	48 Transportation, Delivery and Relocation Services (653-9)
531120	Lessors of Nonresidential Buildings (exc. Mini-warehouses)	03 FAC Facilities Maintenance and Management (812-1)
531210	Offices of Real Estate Agents and Brokers	520 Financial and Business Solutions (FABS) (520-1, -2)
532111	Passenger Car Rental	48 Transportation, Delivery and Relocation Services (411-2)
532112	Passenger Car Leasing	48 Transportation, Delivery and Relocation Services (411-2)
541110	Offices of Lawyers	36 Office, Imaging and Document Solutions (51-508) 520 Financial and Business Solutions (FABS) (520-6) 738X Human Resources & EEO Services (595-28)
541211	Offices of Certified Public Accountants	520 Financial and Business Solutions (FABS) (520-7, -9, -10, -11, -12,)
541214	Payroll Services	520 Financial and Business Solutions (FABS) (520-15)
541219	Other Accounting Services	520 Financial and Business Solutions (FABS) (520-9, -10, -11, -12, -15,
541330	Engineering Services	03 FAC Facilities Maintenance and Management (871-200, -201, -207, -209, -299) 36 Office, Imaging, and Document Solutions (733-6) 871 Professional Engineering Services (PES) (871-1 through -6) 84 Security (246-52, -60-1)
541350	Building Inspection Services	03 FAC Facilities Maintenance and Management (541-1, -99)
541370	Surveying and Mapping (except Geophysical) Services	36 Office, Imaging and Document Solutions (51-501)
541380	Testing Laboratories	899 Environmental Services (899-8) 03 FAC Facilities Maintenance and Management (871-206)
541430	Graphic Design Services	541 Advertising & Integrated Marketing Solutions (AIMS) 541-

		4F)
541511	Custom Computer Programming Services	70 Information Technology (132-51) 541 Advertising & Integrated Marketing Solutions (AIMS) (541-3)
541512	Computer Systems Design Services	70 Information Technology (132-51) 84 Security (246-60-3)
541513	Computer Facilities Management Services	70 Information Technology (132-51)
541519	Other Computer Related Services	70 Information Technology (132-51, -52, -53, -60, -61, -62)
541611	Administrative Management and General Management Consulting Services	874 Mission Oriented Business Integrated Services (MOBIS) (all SINS, BPA) 36 Office, Imaging and Document Solutions (51-501, 733-5) 520 Financial and Business Solutions (FABS) (520-3, -5, -8, -12, -13, -14, -21) 738X Human Resources & EEO Services (595-21, -25, -28) 599 Travel Services Solutions (599-1)
541612	Human Resources and Executive Search Consulting Services	738X Human Resources & EEO Services (595-21, -22, -26, -28)
541613	Marketing Consulting Services	541 Advertising & Integrated Marketing Solutions (AIMS) (541-5)
541614	Process, Physical Distribution, and Logistics Consulting Services	874 V Logistics Worldwide (LOGWORLD) Services (874-501, -503, -504, -505, -506, -597, -599) 48 Transportation, Delivery and Relocation Services (411-3)
541618	Other Management Consulting	599 Travel Services Solutions (599-1) 03 FAC Facilities Maintenance and Management (871-202, -208)
541620	Environmental Consulting Services	899 Environmental Services (899-1, -2, -3, -4, -6, -7, -99)
541690	Other Scientific and Technical Consulting Services	84 Security (246-52)
541711	Research & Development in Biotechnology	871 Professional Engineering Services (PES) (871-1 through -6)
541712	Research & Development in the Physical, Engineering, and Life Sciences (excluding Biotechnology)	871 Professional Engineering Services (PES) (871-1 through -6)
541810	Advertising Agencies	541 Advertising & Integrated Marketing Solutions (AIMS) (541-1, -1000, -2000)

541820	Public Relations Agencies	541 Advertising & Integrated Marketing Solutions (AIMS) (541-2)
541850	Display Advertising	541 Advertising & Integrated Marketing Solutions (AIMS) (541-4C)
541890	Other Services Related to Marketing	541 Advertising & Integrated Marketing Solutions (AIMS) (541-99)
541910	Marketing Research and Public Opinion Polling	541 Advertising & Integrated Marketing Solutions (AIMS) (541-4A)
541922	Commercial Photography	541 Advertising & Integrated Marketing Solutions (AIMS) (541-4E)
541930	Translation and Interpretation Services	738 II Language Services (all SINS)
541990	All Other Professional, Scientific, and Technical Services	58I Professional Audio/Visual... (58-8, -9, -10) 520 Financial and Business Solutions (FABS) (520-17, -20)
561110	Office Administrative Services	36 Office, Imaging and Document Solutions (733-1)
561210	Facilities Support Services	36 Office, Imaging and Document Solutions (51-504, -505) 874 V Logistics Worldwide (LOGWORLD) Services (874-507) 03 FAC Facilities Maintenance and Management (811-2, -3, -6, 003-97)
561310	Employment Placement Agencies	738X Human Resources & EEO Services (595-21)
561320	Temporary Help Services	736 Temporary Administrative and Professional Staffing (TAPS) (all SINS)
561410	Document Preparation Services	738X Human Resources & EEO Services (595-25)
561440	Collection Agencies	520 Financial and Business Solutions (FABS) (520-4)
561450	Credit Bureaus	520 Financial and Business Solutions (FABS) (520-16, BPA)
561499	All Other Business Support Services	36 Office, Imaging and Document Solutions (51-509, 733-2, -3, -4)
561510	Travel Agencies	599 Travel Services Solutions (599-2)
561599	All Other Travel & Reservation Services	599 Travel Services Solutions (599-3)
561611	Investigation Services	84 Security (246-52) 738X Human Resources & EEO Services (595-21, -25, -27) 520 Financial and Business Solutions (FABS) (520-18, -19)
561612	Security Guards and Patrol Services	84 Security (246-54)
561621	Security Systems Services (except Locksmiths)	03 FAC Facilities Maintenance and Management (561-1, -2)

		84 Security (246-52, 246-60-2)
561710	Exterminating & Pest Control Services	03 FAC Facilities Maintenance and Management (371-3)
561730	Landscaping Services	03 FAC Facilities Maintenance and Management (371-1, -2)
561920	Convention and Trade Show Organizers	541 Advertising & Integrated Marketing Solutions (AIMS) (541-4D)
561990	All Other Support Services	03 FAC Facilities Maintenance and Management (871-205) 36 Office, Imaging and Document Solutions (51-507)
562112	Hazardous Waste Collection	899 Environmental Services (899-5)
562910	Remediation Services	899 Environmental Services (899-8)
562920	Materials Recovery Facility	899 Environmental Services (899-5)
611410	Business and Secretarial Schools	69 Training (27-400)
611420	Computer Training, except Computer Repair	70 Information Technology (132-50) 69 Training (27-400)
611430	Professional and Management Development Training	03 FAC Facilities Maintenance and Management (871-203) 69 Training (27-400, -600) 738X Human Resources & EEO Services (595-21)
611512	Flight Training	69 Training (27-400)
611519	Other Technical and Trade Schools	36 Office, Imaging and Document Solutions (51-503)
611691	Exam Preparation and Tutoring	69 Training (27-500)
611692	Automobile Driving Schools	69 Training (27-400)
611699	All Other Misc. Schools & Instruction	69 Training (27-400)
611710	Educational Support Services	69 Training (27-500)
621410	Family Planning Centers	738X Human Resources & EEO Services (595-28)
621420	Outpatient Mental Health & Substance Abuse Center	738X Human Resources & EEO Services (595-28)
624190	Other Individual & Family Services	738X Human Resources & EEO Services (595-21)
624230	Emergency & Other Relief Services	738X Human Resources & EEO Services (595-28)
624310	Vocational Rehabilitation Services	69 Training (27-400) 738X Human Resources & EEO Services (595-28)
624410	Child Day Care Services	738X Human Resources & EEO Services (595-28)
713940	Fitness & Recreational Sports Centers	738X Human Resources & EEO Services (595-28)
721110	Hotels (except Casino Hotels) and Motels	599 Travel Services Solutions (599-3)
721199	All Other Traveler Accommodation	599 Travel Services Solutions (599-3)
812191	Diet & Weight Reducing Centers	738X Human Resources & EEO Services (595-28)

811121	Automotive Body, Paint, and Interior Repair and Maintenance	03 FAC Facilities Maintenance and Management (801-1, -99)
812220	Cemeteries and Crematories	03 FAC Facilities Maintenance and Management (371-4)

Handout D: Some Reasons Contracting Officers Use GSA Multiple Award Schedules¹

- No Posting/Publication (*FedBizOpps* Synopsis) Requirement.²
- Flexibility in Adding Agency-Specific Clauses and Provisions.³
- Contractors Are Already Determined Responsible.⁴
- Ability to Place Orders of Practically Any Size⁵
- GSA Schedule Electronic Tools Assist Market Research, Dissemination of Requests for Quotes (RFQs), and Ordering.⁶
- Recurring Requirements Can Be Satisfied With Flexible Schedule Blanket Purchase Agreements Rather Than Agency Indefinite Quantity Contracts.⁷
- Agencies Retain Maximum Flexibility for “Best Value” Source Selections.⁸
- GSA Schedules Are a Higher Priority Source to Be Considered Before Soliciting Open-Market Commercial Sources for Supplies or Services.⁹
- Statutory “Competition” Requirements Have Already Been Met.¹⁰
- Large Pool of Available Contractors Offering a Wide Variety of Commercial Services and Products.¹¹
- Task Orders Need Not Be Fixed-Price; Schedules Permit Labor Hour and Time & Material Task Orders.¹²
- Agencies Can Make Progress Toward Meeting Socioeconomic Objectives a Primary Best-Value Evaluation Factor.¹³
- Unit Prices Are Already Determined Fair & Reasonable at the Schedule Contract Level.¹⁴

- Agencies Are Free to Negotiate Discounts from GSA “Most Favored Customer” Pricing.¹⁵
- Schedule Contractors Can Team Across Schedules for All-Schedule Solutions to Complex Requirements.¹⁶
- Streamlined RFQ and Ordering Procedures Simplify and Save Time Compared to Complex FAR Part 15 Procedures.¹⁷
- Ordering Agencies Can Retain Full Control Over Their Task Orders; GSA Permission is Not Required to Place Schedule Orders.¹⁸
- GSA Schedules Support the Use of the Government Commercial Purchase Card as an Ordering and Payment Mechanism.¹⁹
- Not Required to Set-Aside Schedule Orders for Small Business, Regardless of Dollar Amount.²⁰
- GSA Provides Classroom and Online Training for Agencies on How to Use GSA Schedules.²¹

¹ Comments on this document can be addressed to david.clemens@gsa.gov, 2/25/2009.

² FAR 8.404(a) refers. The lack of a 10-day posting requirement and the exemption from the synopsis requirement further reduces procurement lead time for Schedule orders. Note that OMB Memo No. M-09-10 dated 2/18/2009 states that 2009 Recovery Act procurements must be synopsized, in addition to other requirements.

³ Schedule contract clauses are available for inspection on each Schedule’s FedBizOpps-posted solicitation. The included clauses are those required of commercial (FAR Part 12) supply or service contracts.

Agencies are free to add to their orders any clauses not conflicting with the FAR or the clauses in the Schedule contract. Options? Award term provisions? Performance incentives? Go for it!

⁴ Ordering agencies are not required to make a separate FAR Subpart 9.1 responsibility determination for Schedule contractors as that determination has already been accomplished by the Schedules Contracting Officer. *Advanced Technology Systems, Inc.*, B-296493.6, October 6, 2006.

⁵ The Minimum Order amount on Schedule contracts is very low, typically \$300 or less. The so-called “Maximum Order Limitation” (MOL) is a misnomer because it actually places no dollar limitation on the authority of the ordering activity to place an order for any amount. The MOL is actually a renegotiation threshold at which ordering activities shall (1) seek additional price discounts [FAR 8.405-1(d), 8.405-4] and (2) send the RFQ to additional Schedule contractors [FAR 8.405-2(c)(3)(i)]. It is also the point at which a Schedule contractor could decline the work by notifying the ordering activity in accordance with the contract.

⁶ Agencies can use *Schedules eLibrary* (<http://www.gsaelibrary.gsa.gov>) to determine which Schedule(s) and SIN(s) are necessary to meet their requirements. Searching service contracts pricelists at *GSA Advantage* (<http://www.gsaadvantage.gsa.gov>) using keywords from the PWS can assist in market research. Accessing those same pricelists is important when the agency enduser is preparing a Government estimate

for acquisition planning. GSA *eBuy* (<http://www.ebuy.gsa.gov>) can be used as a “sources sought notice” to post a Request for Information (or even a Draft RFQ for comment) visible to all holders of a particular Schedule SIN. In the RFQ phase, the *eBuy* website can be used to send out the Schedule order RFQ. (In addition, *GSA Advantage* can be used for the quick and easy process of online shopping and ordering for products.)

⁷ See <http://www.gsa.gov/bpa> and FAR 8.405-3 for information on Schedule BPAs. Schedule BPAs can be Single-Award or Multiple-Award just like indefinite quantity-type contracts. Agencies have the same flexibility with Schedule BPAs (non-conflicting clauses, options, source selection, price discount negotiations, etc.) as they do with Schedule orders. Schedule BPAs, which are simplified acquisition methods for both supplies and services, offer significantly lower procurement lead times when compared with the resources necessary to establish agency IDIQs. In addition, because BPAs are not “contracts” for many FAR purposes, ordering agencies have enhanced flexibility. (For a discussion of this issue with case references, see <http://www.schedulesolutions.net> under BPAs.)

⁸ Neither FAR SubPart 8.4 nor the terms of the Schedule contracts place any restriction on the flexibility of the ordering agency to establish desired order evaluation factors or source selection procedures. Because FAR Part 15 does not apply to Schedule orders or Schedule BPAs (see note 17 below), Schedule ordering permits streamlined and simplified source selection. Agencies can evaluate quotes for Schedule orders or BPAs from anywhere in the Best Value Continuum from low-price-technically-acceptable to full best value evaluation.

⁹ FAR 8.002 provides the prioritized list of Government supply and service sources. According to those priorities, agencies shall satisfy their requirements for supplies and services from GSA Schedules in preference to commercial (open-market) sources.

¹⁰ Schedule BPAs and orders are considered to be issued using full and open competition. FAR 6.102(d)(3). When placing orders against GSA Schedules or establishing Schedule BPAs, ordering agencies shall not seek competition outside the MAS program. FAR 8.404(a). When agencies use the FAR 8.405-1 and -2 ordering procedures, the requirements of the Competition in Contracting Act (CICA) of 1984 have been met.

¹¹ Over 11 million supplies and services are available on GSA’s 48 Multiple Award Schedules from over 17,000 Schedule contractors. A particular Schedule can typically have many hundreds of available contractors representing the whole range of socioeconomic categories. To see a hypertext list of GSA’s Schedules, go to <http://www.gsaelibrary.gsa.gov> and then pull down “Federal Supply Schedule Listing” from the menu bar.

¹² Schedule contracts for services include the applicable Time and Materials clause(s). Agencies can view the Schedule contract clauses at *FedBizOpps* via the *Schedules eLibrary* page for each Schedule. I suggest you include the provision FAR 52.216-31 *Time-and-Material/Labor –Hour Proposal Requirements – Commercial Item Acquisitions* in the RFQ for a commercial Level of Effort (T&M or LH) task order.

¹³ FAR 8.405-5. With the exception of Schedule orders to 8(a) contractors (see 71 FR 66434 of 11/15/2006 eff. 6/30/2007), orders placed against Schedule contracts may be credited toward the ordering activity’s socioeconomic goals. (For a detailed discussion and additional references on the issue of Small Business set-asides, see the blogsite: <http://www.schedulesolutions.net> under “Can Schedule Orders (and Schedule BPAs) Be Set-Aside for Small Business?”)

¹⁴ FAR 8.404(d).

¹⁵ *Ibid.*, FAR 8.405-1(d), 8.405-2(c)(3)(ii). FAR 8.405-4: “Schedule contractors are not required to pass on to all Schedule users a price reduction extended only to an individual ordering activity for a specific order.”

¹⁶ See <http://www.gsa.gov/cta> for FAQs on Schedule contractor teaming and information on the contents of a Contractor Team Agreement.

¹⁷ Nothing in FAR Part 15 applies to Schedule orders or BPAs. FAR 8.404(a). Ordering activities failing to treat a Schedules procurement under FAR 8.4 as a streamlined acquisition and instead relying on the more complex Part 15 acquisition procedures do so at their peril. The United States Court of Claims has specifically held that FAR Part 15 is not applicable to MAS orders. See *Ellsworth Associates, Inc. v United States*, 45 Fed. Cl. 388 (1999). The Government Accountability Office (GAO) has also stated that FAR Part 15 does not apply to Schedule orders. See *Computer Products, Inc.*, B-284702, May 24, 2000. If a formal FAR Part 15 negotiation process or something akin to it is utilized (as in debriefing), GAO may use FAR Part 15 as guidance in reviewing an agency’s actions. See *ACS Government Solutions Group, Inc.*, B-

282098.2, B-282098.3, June 2, 1999. Discussions with contractors are not required for Schedule orders. Instead the Ordering CO can seek additional information regarding an RFQ without triggering Part 15 discussion rules. See *Intelligent Decisions, Inc.*, B-274626.2, December 23, 1996 and *ViON Corporation*, B-283804.2, January 24, 2000.

¹⁸ There are GSA offices that will (for a fee) act as an agency's Ordering Officer. But those "assisted services" are not required in order for agencies to directly issue and administer their delivery/task orders against the GSA Schedules. **Ordering activities pay no fee to GSA to issue their own orders against a Schedules contract.** (The GSA Schedule contract prices already include a 0.75% Industrial Funding Fee which the Schedule contractors remit to GSA. Ordering activities receiving a quote from a Schedule contractor with a 0.75% IFF added to the quote should inform the contractor that the Schedule price already includes the IFF. Ordering Officers may wish to contact the GSA Contracting Officer if necessary.)

¹⁹ All GSA Schedules require contractors to accept the purchase card for Schedule orders at or below the micropurchase threshold. Most contractors also choose to accept the purchase card for orders above the micropurchase threshold. (See each contractor's *GSA Advantage*-posted pricelist for more information.) Shopping at *GSA Advantage* supports the use of the purchase card.

²⁰ The set-aside provisions of FAR Part 19 do not apply to Schedule orders. For case law and regulatory references supporting the assertion that there is no such thing as a Schedule order set-aside for small businesses, see <http://www.schedulesolutions.net> under *Small Business Issues*.

²¹ GSA websites like *eBuy* and *GSA Advantage!* include tutorials. The free online training course "**Using GSA Schedules – Customer (Services)**" is available at <http://cae.gsa.gov>. That same training website includes the "GSA Schedule Order Checklist" in the course library. The checklist is a useful summary for ordering agencies. Another useful training reference is the *Multiple Award Schedules Desk Reference* [2008], found at <http://www.schedulesolutions.net> under *References*.

Handout E: Extract from GSA Task Order Checklist
 (from “Documents” at GSA Center for Acquisition Excellence, <http://cae.gsa.gov>, 12/20/2007)

B. GSA SCHEDULE CONTRACTING CHECKLIST FOR SERVICES THAT REQUIRE AN ORDERING ACTIVITY STATEMENT OF WORK					
Quest	When using GSA Schedules you should be able to answer “Yes” to ALL the applicable questions below. If your answer is “No” to ANY question, take action to correct the deficiency. For additional guidance in answering any question, select “GO TO Related Questions.”	Yes	No	N/A	GO TO Related Questions
B.1	Do you use GSA e-Tools and/or other available sources for market research?				B.1
B.2	Is the statement of work (SOW) adequate for the requirement?				B.2
B.3	Does the quality assurance surveillance plan (QASP) meet the requirements of good business practice?				B.3
B.4	Is the required service available from a higher priority source?				B.4
B.5	Does the statement of work permit commercial item acquisition?				B.5
B.6	If the current statement of work does not permit commercial item acquisition, should it be modified to permit commercial item acquisition?				B.6
B.7	Can the service be acquired using the GSA Schedules Program?				B.7
B.8	Do you consider relevant factors in developing an acquisition strategy for the Schedule order?				B.8
B.9	Should the ordering activity, activities, or agencies establish Schedule blanket purchase agreement(s)?				B.9
B.10	If the requirement is covered by an existing Schedule blanket purchase agreement (BPA), do you follow appropriate procedures when identifying contractors to receive a copy of the request for quotations (RFQ)?				B.10
B.11	If the requirement is not covered by an existing Schedule blanket purchase agreement, is the number of Schedule contractors identified to receive the request for quotations adequate for the requirement?				B.11
B.12	Is the request for quotations adequate for the requirement?				B.12
B.13	Are Schedule solutions evaluated fairly in accordance with the criteria established in the request for quotations?				B.13
B.14	Does the Schedule order meet all Federal Acquisition Regulation (FAR) requirements?				B.14
B.15	When a Schedule blanket purchase agreement (BPA) is used, does the BPA meet all FAR order placement requirements?				B.15

B.1 Do you use GSA e-Tools and/or other available sources of GSA Schedules information for market research?			
Quest	Situation	Related Questions	Then
B.1.1	If your answer is “YES” to EITHER of the following questions:	<ul style="list-style-type: none"> Do you use Schedules e-Library (http://www.gsa.gov/elibrary) to identify contractors that provide the type of service or supply required under the current acquisition? Do you use GSA Advantage! (http://www.gsa.gov/advantage) to identify the services or 	You are using GSA e-Tools in your market research.

		supplies that meet the current acquisition requirement?	Answer “Yes” to Question B.1. Return to Checklist B.
B.1.2	If your answer is “YES” to ANY of the following questions:	<ul style="list-style-type: none"> • Do you use information from Schedule pricelists in your market research to identify available services and supplies? • Do you use information from knowledgeable individuals to identify Schedule contractors, services, or supplies? • Do you use information from recent market research to identify Schedule contractors, services, or supplies? • Do you use information from the Interagency Contract Directory (http://www.contractdirectory.gov) to identify Schedule contractors? • Do you use information from Schedule contractor catalogs to identify services or supplies available under GSA Schedules? • Do you use information from Schedule contractor brochures and promotional material to identify services or supplies available under GSA Schedules? 	You are using other available sources of Schedule GSA Schedules information. Answer “Yes” to Question B.1. Return to Checklist B.
Otherwise the answer to Question B.1 is “No” or “N/A.” If you select “N/A,” you should be able to explain your rationale. Return to Checklist B.			

B.2 Is the statement of work adequate for the requirement?			
Quest	Situation	Related Questions	Then
B.2.1	If your answer is “YES” to ALL the following questions:	<ul style="list-style-type: none"> • Does the statement of work (SOW) include: <ul style="list-style-type: none"> ▪ The work to be performed; ▪ The location of work; ▪ The period of performance; ▪ The deliverable schedule; ▪ Applicable performance standards; and ▪ Any special requirements (e.g., security clearances, travel, or special knowledge)? (See FAR 8.405-2(b)) • Does the SOW define the requirement using clear, concise language that identifies the specific work to be accomplished? (See FAR 37.602-1(a)) • Is the SOW a performance-based document that to the maximum extent practicable: (See FAR 8.405-2(b) and 37.602-1(b)) <ul style="list-style-type: none"> ▪ Describes the requirement in terms of the required output rather than either how the work is to be accomplished or the number of hours to be provided; ▪ Enables assessment of work performance against measurable performance standards; ▪ Relies on the use of measurable performance standards and financial incentives to encourage innovative and cost-effective methods of performing the work; and ▪ Avoids combining requirements into a single acquisition that is too broad for the agency or a prospective contractor to manage effectively. 	The SOW meets requirements of FAR 8.405-2(b) and 37.602-1 for a performance-based SOW. Answer “Yes” to Question B.2. Return to Checklist B.

B.2.2	If your answer is “YES” to ALL the following questions:	<ul style="list-style-type: none"> • Does the statement of work (SOW) include: <ul style="list-style-type: none"> ▪ The work to be performed; ▪ The location of work; ▪ The period of performance; ▪ The deliverable schedule; ▪ Applicable performance standards; and ▪ Any special requirements (e.g., security clearances, travel, or special knowledge)? (See FAR 8.405-2(b)) • Does the statement of work define the requirement using clear, concise language that identifies the specific work to be accomplished? (See FAR 37.602-1(a)) • If the SOW is not performance-based, does the order file include a written statement that describes the rationale for using another type of SOW (i.e., a detailed SOW or level-of-effort SOW)? (See FAR 8.405-7(b)(4)(ii)) 	<p>The SOW meets the requirements of FAR 8.405-2(b) and FAR 8.405-7(b)(4)(ii) for acquiring services using other than a performance based order.</p> <p>Answer “Yes” to Question B.2.</p> <p>Return to Checklist B.</p>
Otherwise the answer to Question B.2 is “No” or “N/A.” If you select “N/A,” you should be able to explain your rationale. Return to Checklist B.			

B.3 Does the quality assurance surveillance plan (QASP) meet the requirements of good business practice?			
Quest	Situation	Related Questions	Then
B.3.1	If your answer is “YES” to ALL the following questions:	<ul style="list-style-type: none"> • Is the quality assurance surveillance plan (QASP) at the same time as the statement of work (SOW)? • Does the QASP include: <ul style="list-style-type: none"> ▪ Purpose or objective of the plan; ▪ Roles and responsibilities of Government personnel affected by the plan; ▪ Surveillance tasks associated with the plan; ▪ Acceptable levels of quality for the service under surveillance; and ▪ Documentation and reporting requirements? • Are the surveillance methods (e.g., random sampling or periodic inspection) identified in the surveillance tasks appropriate for the services under surveillance? 	<p>The QASP meets the requirements of FAR 37.602-2 and good business practice.</p> <p>Answer “Yes” to Question B.3.</p> <p>Return to Checklist B.</p>
Otherwise the answer to Question B.3 is “No” or “N/A.” If you select “N/A,” you should be able to explain your rationale. Return to Checklist B.			

B.4 Is the required service available from a higher priority source?			
Quest	Situation	Related Questions	Then
B.4.1	If your answer is “NO” to the following question:	<ul style="list-style-type: none"> • Is the required service available from the Procurement List maintained by the Committee for Purchase From People Who Are Blind or Severely Disabled? (See FAR 8.002(a)(2)) 	The service is not available from a higher priority source for meeting service requirements.

			Answer “Yes” to Question B.4. Return to Checklist B.
Otherwise the answer to Question B.4 is “No” or “N/A.” If you select “N/A,” you should be able to explain your rationale. Return to Checklist B.			

B.5 Does the statement of work permit commercial item acquisition?			
Quest	Situation	Related Questions	Then
B.5.1	If your answer is “YES” to BOTH the following questions:	<ul style="list-style-type: none"> Does the statement of work (SOW) require an installation service, maintenance service, repair service, training service, or other service being acquired for support of nongovernmental supplies, evolved nongovernmental supplies, or modified nongovernmental supplies, whether or not such services are provided by the same source or at the same time as the related supply? Do the sources of the required installation service, maintenance service, repair service, training service, or other service provide similar services contemporaneously to the general public under terms and conditions similar to those offered to the acquiring activity? 	<p>The SOW describes a requirement that meets the commercial item definition. (FAR 2.101(b))</p> <p>Answer “Yes” to Question B.5.</p> <p>Return to Checklist B.</p>
B.5.2	If your answer is “YES” to the following question:	<ul style="list-style-type: none"> Does the SOW require a service offered and sold competitively in substantial quantities in the commercial marketplace based on established catalog prices or market prices? 	<p>The SOW describes a requirement that meets the commercial item definition. (FAR 2.101(b))</p> <p>Answer “Yes” to Question B.5.</p> <p>Return to Checklist B.</p>
Otherwise the answer to Question B.5 is “No” or “N/A.” If you select “N/A,” you should be able to explain your rationale. Return to Checklist B.			

B.6 If the current statement of work does not permit commercial item acquisition, should it be modified to permit commercial item acquisition?			
Quest	Situation	Related Questions	Then
B.6.1	If your answer is “YES” to BOTH the following questions:	<ul style="list-style-type: none"> Is it possible to modify the statement of work (SOW) to describe the requirement in terms that will permit the activity to acquire a commercial item? Does the Government acquisition team agree that modifying the SOW will be in the best interests of the Government? 	<p>The requirement should be modified to permit commercial item acquisition considering the FAR 11.002(a)(2)(ii) preference for commercial item acquisition.</p> <p>Answer “Yes” to Question B.6.</p> <p>Return to Checklist B.</p>

Otherwise the answer to Question B.6 is “No” or “N/A.” If you select “N/A,” you should be able to explain your rationale. [Return to Checklist B.](#)

B.7 Can the service be acquired using the GSA Schedules Program?			
Quest	Situation	Related Questions	Then
B.7.2	If your answer is “YES” to ALL the following questions:	<ul style="list-style-type: none"> • Can individual Schedule contractors meet the total requirement by providing services available under the GSA Schedules Program? • Are available services and/or supplies included in the scope of the relevant Schedule contract(s)? • Is use of GSA Schedules to acquire this service permitted by current law and regulation (e.g., Architect-Engineer services CANNOT be acquired using GSA Schedules because Contracting Officers must follow the requirements of the Brooks Act and FAR 36.6, Architect-Engineer Services)? 	<p>You can acquire the service under the GSA Schedule Program.</p> <p>Answer “Yes” to Question B.7.</p> <p>Return to Checklist B.</p>
B.7.3	If your answer is “YES” to ALL the following questions:	<ul style="list-style-type: none"> • Can two or more Schedule contractors team together to meet the total requirement by providing services available under the GSA Schedules Program? • Are available services included in the scope of the relevant Schedule contract(s)? • Is use of GSA Schedules to acquire this service permitted by current law and regulation (e.g., Architect-Engineer services CANNOT be acquired using GSA Schedules because Contracting Officers must follow the requirements of the Brooks Act and FAR 36.6, Architect-Engineer Services)? 	<p>You can acquire the service under the GSA Schedule Program.</p> <p>Answer “Yes” to Question B.7.</p> <p>Return to Checklist B.</p>
B.7.4	If your answer is “YES” to ALL the following questions:	<ul style="list-style-type: none"> • Can the ordering activity meet a portion of the requirement under the GSA Schedules Program while meeting the remainder of the requirement using an open market acquisition? • Are available Schedule services included in the scope of the relevant Schedule contract(s)? • Is use of GSA Schedules to acquire this service permitted by current law and regulation (e.g., Architect-Engineer services CANNOT be acquired using GSA Schedules because Contracting Officers must follow the requirements of the Brooks Act and FAR 36.6, Architect-Engineer Services)? • Will the ordering activity benefit by meeting a portion of the requirement under the GSA Schedules Program while meeting the remainder of the requirement using an open market acquisition? • Can the open market portion of the acquisition be completed while complying with ALL applicable acquisition regulations (e.g., the guidance on publicizing acquisitions in FAR Part 5; competition in FAR Part 6; commercial item acquisition in FAR Part 12; contracting methods in FAR Parts 13, 14, and 15; and small business programs in FAR Part 19)? (See FAR 8.402(f)(1)) • Will the ordering activity contracting officer be able to determine that the price for the services or supplies not on a GSA Schedule contract is fair and reasonable? (See FAR 8.402(f)(2)) • Can the services or supplies not on a GSA Schedule contract be clearly identified and labeled? (See FAR 8.402(f)(3)) • Can all clauses applicable to the services or supplies not on GSA Schedule be included in the 	<p>You can acquire a portion of the requirement under the GSA Schedule Program. The remainder of the requirement must be met using ALL applicable open market acquisition procedures.</p> <p>Answer “Yes” to Question B.7.</p> <p>Return to Checklist B.</p>

	order? (See FAR 8.402(f)(4))	
Otherwise the answer to Question B.7 is “No” or “N/A.” If you select “N/A,” you should be able to explain your rationale. Return to Checklist B.		

B.8 Do you consider relevant factors in developing an acquisition strategy for the Schedule order?			
Quest	Situation	Related Questions	Then
B.8.1	If your answer is “YES” to the following question:	<ul style="list-style-type: none"> • Can you obtain the best value by awarding the order to the contractor with the lowest price for a technically acceptable service or supply? 	Your request for quotations (RFQ) should state that award will be made to the contractor that quotes lowest price for a technically acceptable service or supply.
B.8.2	If your answer is “YES” to the following question:	<ul style="list-style-type: none"> • Should tradeoffs between factors such as (but not limited to) the following be considered in addition to price and technical acceptability in identifying the best value for the ordering activity: <ul style="list-style-type: none"> ▪ Past performance; ▪ Special features required for effective program performance; ▪ Trade-in considerations; ▪ Probable life of the item selected as compared with that of comparable items; ▪ Warranty considerations; ▪ Maintenance availability; ▪ Environmental and energy efficiency considerations; or ▪ Delivery terms? 	Your request for quotations (RFQ) should state that evaluation for award will consider tradeoffs between price and the other identified best value factors.
B.8.3	If your answer is “YES” to ALL the following questions:	<ul style="list-style-type: none"> • Does the Government acquisition team agree that the Government will benefit from superior contractor performance in providing the requirement? • Can a performance incentive be used to give the contractor reason to provide superior quality performance? (FAR 37.601(a)(4)) • Would the benefit from superior contractor performance exceed the cost of the incentive and related order administration necessary to obtain that level of performance? • Can the ordering activity obtain the funds and any necessary approval needed for use of a performance incentive? 	Include a performance incentive in the RFQ and the Schedule order.
B.8.4	If your answer is “YES” to BOTH the following questions:	<ul style="list-style-type: none"> • Are there other requirements (e.g., a Defense Priorities and Allocation System rating) that should be added to the Schedule acquisition? • Can the additional requirement be added using terms and conditions that do not conflict with the Schedule contract terms and conditions? 	Add the identified requirement to the RFQ and the Schedule order keeping in mind that additional terms and conditions must not conflict with Schedule contract terms and conditions or result in an order scope different than the Schedule contract.
B.8.5	If your answer is “YES” to BOTH the following	<ul style="list-style-type: none"> • Will a contractor need additional services or supplies to complete the contract? • Are the required additional services or supplies included under the Schedule contract (i.e., 	You may include the contract support items as part of the Schedule order.

	questions:	Schedule contract support items)?	
B.8.6	If your answer is “YES” to ALL the following questions:	<ul style="list-style-type: none"> • Will a contractor need additional services or supplies to complete the contract? • If the required additional services or supplies are not included under the Schedule contract, can they be acquired following ALL the applicable open market acquisition requirements of: <ul style="list-style-type: none"> ▪ FAR Part 5 – Publicizing Contract Actions; ▪ FAR Part 6 – Competition Requirements; ▪ FAR Part 12 – Acquisition of Commercial Items; ▪ FAR Part 13 – Simplified Acquisition Procedures; ▪ FAR Part 14 – Sealed Bidding; ▪ FAR Part 15 – Contracting by Negotiation; and ▪ FAR Part 19 – Small Business Programs? • Can any services or supplies not covered by a Schedule contract be clearly identified in the request for quotations (RFQ) and order? 	You may include incidental items as part of the Schedule order. HOWEVER, any services or supplies not on Schedule contract must be clearly identified and all terms and conditions applicable to the open market acquisition must be included in the order.
B.8.7	If your answer is “YES” to BOTH the following questions:	<ul style="list-style-type: none"> • Will travel be required to support a service order? • Can the contractor be reimbursed for travel following the requirements of: <ul style="list-style-type: none"> ▪ Ordering agency regulations for local travel or ▪ The Federal Travel Regulation (FTR) or Joint Federal Travel Regulation (JFTR) for other travel? 	You should provide for travel cost reimbursement in the request for quotations and the Schedule order.
B.8.8	If your answer is “YES” to BOTH the following questions:	<ul style="list-style-type: none"> • Is an order with a time-and-material (T&M) or labor hour (LH) pricing arrangement more appropriate than a firm-fixed-price (FFP) order? • Has the Government acquisition team documented the rationale for using other than an FFP pricing arrangement and placed the documentation in the order file? (See FAR 8.405-7(b)(4)(i)) 	You may use a T&M or LH pricing arrangement for the Schedule order.
B.8.9	If your answer is “YES” to BOTH the following questions:	<ul style="list-style-type: none"> • Does the requirement involve bundling, that is the consolidating of two or more service requirements, previously provided or performed under separate smaller contracts, into a solicitation for a single contract that is likely to be unsuitable for award to a small business concern due to: <ul style="list-style-type: none"> ▪ The diversity, size, or specialized nature of the elements of the performance specified; ▪ The aggregate dollar value of the anticipated award; ▪ The geographical dispersion of the contract performance sites; or ▪ Any combination of the factors described above. • Are you complying with all applicable FAR requirements related to bundling (e.g., FAR 7.107)? (See FAR 8.404(c)(2)) 	Continue with the acquisition ensuring that you are complying with ALL applicable FAR requirements.
B.8.10	If your answer is “YES” to BOTH the following questions:	<ul style="list-style-type: none"> • Are you acquiring a service requirement for another agency? • Is your planning consistent with the requiring agency’s statutory and regulatory requirements applicable to the acquisition? (See FAR 8.404(c)(3)) 	Continue with the acquisition ensuring that you comply with ALL applicable statutory and regulatory requirements.
B.8.11	If your answer is “YES” to BOTH the following questions:	<ul style="list-style-type: none"> • Is a written acquisition plan required by agency policy? (See FAR 7.103(e) and applicable agency policy)? • When required, does the acquisition plan address all the applicable FAR and agency requirements? (See FAR 7.105 and applicable agency policy) 	A written plan must be prepared addressing ALL applicable FAR and agency acquisition plan requirements.

Answer “Yes” to Question B.8 if your acquisition strategy considers all relevant factors including those above. [Return to Checklist B.](#)

Otherwise the answer to Question B.8 is “No” or “N/A.” If you select “N/A,” you should be able to explain your rationale. [Return to Checklist B.](#)

B.9 Should the ordering activity, activities, or agencies establish Schedule blanket purchase agreement(s)?			
Quest	Situation	Related Questions	Then
B.9.1	If your answer is “YES” to ALL the following questions:	<ul style="list-style-type: none"> Do multiple activities or agencies have a continuing requirement for the same or similar services? Does it appear that the multiple ordering activities or agencies will benefit from the acquisition streamlining and additional discounts typically associated with using one or more Schedule blanket purchase agreements (BPAs)? Can the participating activities or agencies and their estimated requirements be identified at the time the BPA is established? (See FAR 8.405-3(a)(4)) 	<p>The multiple activities or agencies should establish one or more Schedule BPAs.</p> <p>Answer “Yes” to Question B.9.</p> <p>Return to Checklist B.</p>
B.9.2	If your answer is “YES” to ALL the following questions:	<ul style="list-style-type: none"> Does the ordering activity have a continuing requirement for the same or similar services? Does it appear that the ordering activity will benefit from the acquisition streamlining and additional discounts typically associated with using one or more Schedule blanket purchase agreements (BPAs)? Does it appear that multiple ordering activities or agencies: <ul style="list-style-type: none"> Will not benefit from establishing one or more Schedule BPAs; or Will not be able to identify their requirements at the time a Schedule BPA is established? (See FAR 8.405-3(a)(1)) 	<p>The ordering activity should establish one or more Schedule BPAs.</p> <p>Answer “Yes” to Question B.9.</p> <p>Return to Checklist B.</p>

Otherwise the answer to Question B.9 is “No” or “N/A.” If you select “N/A,” you should be able to explain your rationale. [Return to Checklist B.](#)

B.10 If the requirement is covered by an existing Schedule blanket purchase agreement (BPA), do you follow appropriate procedures when identifying contractors to receive a copy of the request for quotations (RFQ)?			
Quest	Situation	Related Questions	Then
B.10.1	If the service requirement is covered by a <u>single</u> BPA and your answer is “YES” to ALL the following questions:	<ul style="list-style-type: none"> Is your activity identified as an authorized ordering activity under the BPA? Are you identified in the BPA as a person authorized to place an order? Do you only distribute the RFQ to the BPA holder? 	<p>The identification of solutions follows appropriate procedures.</p> <p>Answer “Yes” to Question B.10.</p> <p>Return to Checklist B.</p>
B.10.2	If the service requirement is equal to or less than the micro-purchase threshold, covered by <u>multiple</u> BPAs, and your	<ul style="list-style-type: none"> Is your activity identified as an authorized ordering activity under the BPA? Are you identified in the BPA as a person authorized to place an order? Do you distribute the RFQ to at least one of the BPA holders? Do you distribute orders among BPA holders? 	<p>The identification of solutions follows appropriate procedures.</p> <p>Answer “Yes” to Question B.10.</p>

	answer is “YES” to ALL the following questions:		Return to Checklist B.
B.10.3	If the service requirement is greater than the micro-purchase threshold, covered by <u>multiple</u> BPAs, and your answer is “YES” to ALL the following questions:	<ul style="list-style-type: none"> • Is your activity identified as an authorized ordering activity under the BPA? • Are you identified in the BPA as a person authorized to place an order? • Does the BPA include guidelines on the BPA holders that will receive an RFQ for service requirements? • Do you forward the statement of work and the evaluation criteria to an appropriate additional number of BPA holders as established in the BPA ordering procedures? 	<p>The identification of solutions follows appropriate procedures.</p> <p>Answer “Yes” to Question B.10.</p> <p>Return to Checklist B.</p>
Otherwise the answer to Question B.10 is “No” or “N/A.” If you select “N/A,” you should be able to explain your rationale. Return to Checklist B.			

B.11 If requirement is not covered by an existing Schedule blanket purchase agreement, is the number of Schedule contractors identified to receive the request for quotations adequate for the requirement?			
Quest	Situation	Related Questions	Then
B.11.1	If the order will be at or below the micro-purchase threshold and your answer is “YES” to BOTH the following questions:	<ul style="list-style-type: none"> • Have you identified at least one Schedule contractor that can meet the ordering activities requirements? • Do you distribute orders among competitive Schedule contractors? (See FAR 8.405-2(c)(1)) 	<p>The number of contractors identified to receive a copy of the RFQ is adequate for the requirement.</p> <p>Answer “Yes” to Question B.11.</p> <p>Return to Checklist B.</p>
B.11.2	If the order will be greater than the micro-purchase threshold but less than or equal to the Schedule maximum order (MO) threshold and your answer is “YES” to ALL the following questions:	<ul style="list-style-type: none"> • Have you identified at least three Schedule contractors? (See FAR 8.405-1(c)) • If available, do the identified Schedule contractors include at least one contractor that falls into one of the following classifications: <ul style="list-style-type: none"> ▪ Small business concern; ▪ Veteran-owned small business concern; ▪ Service disabled veteran-owned small business concern; ▪ HUBZone small business concern; ▪ Women-owned small business concern; or ▪ Small disadvantaged business concern? FAR 8.405-5(b)) • Is a copy of the RFQ (including the evaluation criteria) provided to any Schedule contractor that requests a copy? 	<p>At least the minimum number of Schedule contractors have been identified receive a copy of the RFQ.</p> <p>Answer “Yes” to Question B.11.</p> <p>Return to Checklist B.</p>
B.11.3	If the order will be greater than the Schedule maximum order (MO) threshold and your answer is “YES” to ALL the following questions:	<ul style="list-style-type: none"> • Have you identified more than three Schedule contractors? (See FAR 8.405-1(d)) • When identifying number of additional Schedule contractors to receive a copy of the request for quotations (RFQ), do you consider, among other factors, the following: <ul style="list-style-type: none"> ▪ The complexity, scope and estimated value of the requirement; and ▪ The market search results? • If available, did the identified Schedule contractors include at least one contractor that falls into 	<p>At least the minimum number of Schedule contractors have been identified receive a copy of the RFQ.</p> <p>Answer “Yes” to Question B.11.</p>

		<p>one of the following classifications:</p> <ul style="list-style-type: none"> ▪ Small business concern; ▪ Veteran-owned small business concern; ▪ Service disabled veteran-owned small business concern; ▪ HUBZone small business concern; ▪ Women-owned small business concern; or ▪ Small disadvantaged business concern? (See FAR 8.405-5(b)) <ul style="list-style-type: none"> • Is a copy of the RFQ (including the statement of work and the evaluation criteria) provided to any Schedule contractor that requests a copy? 	Return to Checklist B.
B.11.4	If the number of sources identified is less than the number required by FAR 8.405-2 and your answer is “YES” to ALL the following questions:	<ul style="list-style-type: none"> • Do you document the circumstances and rationale for limiting the number of sources required by FAR 8.405-2? • Is the rationale based on one of the following justifications: <ul style="list-style-type: none"> • Only one source is capable of responding due to the unique or specialized nature of the work • The new work is a logical follow-on to an existing order provided that the original order was placed in accordance with FAR 8.405-1 (excluding orders placed previously under sole source requirements); • The item is peculiar to one manufacturer (a brand name item, available on various Schedule contracts, is an item peculiar to one manufacturer); or • An urgent and compelling need exists and following the ordering procedures would result in unacceptable delays? (See FAR 8.405-7(a)(4)) • Is the justification documented and approved following the requirements of FAR 8.405-6? 	<p>Under these circumstances, the limited number of identified sources is permitted in accordance with FAR 8.405-6.</p> <p>Answer “Yes” to Question B.11.</p> <p>Return to Checklist B.</p>
Otherwise the answer to Question B.11 is “No” or “N/A.” If you select “N/A,” you should be able to explain your rationale. Return to Checklist B.			

B.12 Is the request for quotations adequate for the requirement?			
Quest	Situation	Related Questions	Then
B.12.1	If your answer is “YES” to BOTH the following questions:	<ul style="list-style-type: none"> • Does the RFQ include: <ul style="list-style-type: none"> ▪ Basic information, such as: <ul style="list-style-type: none"> ○ A number or other clear RFQ identification; ○ Issuing organization; ○ RFQ closing date and time; ○ Description of each line item; ○ Quantity required of each line item; and ○ Performance/delivery location and time requirements? ▪ Any special requirements, such as: <ul style="list-style-type: none"> ○ Performance incentives; (See FAR 37.601(a)(4)) ○ Pricing arrangement other than firm-fixed-price; or ○ Any additional terms and conditions (e.g., Defense Priorities and Allocations System) that 	<p>The RFQ provides relevant information to quoters.</p> <p>Answer “Yes” to Question B.12.</p> <p>Return to Checklist B.</p>

		<p>do not conflict with the Schedule terms and conditions?</p> <ul style="list-style-type: none"> ▪ Any relevant information and instructions to quoters, such as any: <ul style="list-style-type: none"> ○ Any intent to award a BPA instead of a one-time order (when appropriate); ○ Any requirement that all Schedule contractor team arrangement participants must be Schedule contractors; ○ Any requirement for quoter information for supply/service evaluation; or ○ Requirement for quoter information to evaluate past performance? ▪ Quote evaluation criteria that, as a minimum: <ul style="list-style-type: none"> ○ Whether award will be made to the contractor with the low priced technically acceptable quote or to the contractor that offers the best value given a tradeoff of price and other identified factors; and ○ For any requirement exceeding the micro-purchase threshold, preference to the services available from small business concerns when two or more services at the same delivered price will satisfy the requirement? ▪ Any ordering activity documents or other information that the quoter would need to prepare a quotation (e.g., a copy of the statement or work and quality assurance surveillance plan)? • Is the request for quotations (RFQ) clearly and effectively transmitted to the identified Schedule contracts using: <ul style="list-style-type: none"> ▪ e-Buy; ▪ Email; or ▪ A paper document? 	
--	--	---	--

Otherwise the answer to Question B.12 is “No” or “N/A.” If you select “N/A,” you should be able to explain your rationale. [Return to Checklist B.](#)

B.13 Are Schedule solutions evaluated fairly in accordance with the criteria established in the request for quotations?			
Quest	Situation	Related Questions	Then
B.13.1	If your answer is “YES” to ALL the following questions:	<ul style="list-style-type: none"> • Is the evaluation conducted using only the criteria stated in the request for quotations (RFQ)? • If the requirement exceeds the micro-purchase threshold, do the RFQ criteria and the evaluation give preference to the services available from small business concerns when two or more services at the same delivered price will satisfy the requirement? (See FAR 8.405-5(c)) • If market research indicates that an additional price reduction is appropriate (e.g., services are available elsewhere at a lower price), does the ordering activity pursue an additional price reduction? (See FAR 8.405-4) • If the requirement exceeds the maximum order (MO) threshold, does the ordering activity seek an additional price reduction from the Schedule contractor(s) whose solution(s) appear to represent best value after the initial evaluation? (See FAR 8.405(c)(3)(ii)) • Does the quote selected for award represent the best value, whether or not the Schedule contractor offered an additional price reduction? • Is the quoted level of effort and mix of labor reasonable for the task(s) required? (See FAR 405-3(d)) 	<p>The evaluation of Schedule solutions is conducted fairly in accordance with the criteria established in the RFQ.</p> <p>Answer “Yes” to Question B.13.</p> <p>Return to Checklist B.</p>

		<ul style="list-style-type: none"> • Is there written documentation stating that the total price is reasonable for the task(s) required? (See FAR 405-3(d)) 	
<p>Otherwise the answer to Question B.13 is “No” or “N/A.” If you select “N/A,” you should be able to explain your rationale. Return to Checklist B.</p>			

B.14 Does the Schedule order meet all Federal Acquisition Regulation (FAR) requirements?			
Quest	Situation	Related Questions	Then
B.14.1	If your answer is “YES” to ALL the following questions:	<ul style="list-style-type: none"> • Is the purchaser a: <ul style="list-style-type: none"> ▪ Warranted contracting officer; ▪ Governmentwide commercial purchase card holder acting within authorized limits for card use; or ▪ Person otherwise authorized by the ordering activity to order using GSA Schedules? • Prior to placing the order, does the purchaser ensure that the regulatory and statutory requirements of the requiring agency have been applied? (See FAR 8.404(c)(3)) • Is the written order prepared using an Optional Form 347 or an agency-prescribed form? (See FAR 8.406-1) • Does the order include the following information in addition to any information required by the Schedule contract: <ul style="list-style-type: none"> ▪ Complete shipping and billing addresses; ▪ Contract number and date; ▪ Agency order number; ▪ F.o.b. delivery point (i.e., origin or destination); ▪ Discount terms; ▪ Delivery time or period of performance; ▪ Special item number or national stock number; ▪ A brief, complete description of each service: ▪ Quantity and any variation in quantity; ▪ Number of units; ▪ Unit price; ▪ Total price of order; ▪ Points of inspection and acceptance; ▪ Other pertinent data (e.g., delivery instructions or receiving hours and size-of-truck limitation); ▪ Marking requirements; and ▪ Level of preservation, packaging, and packing. • Do orders to contractor teams under a Schedule contractor team arrangement (CTA) clearly indicate which services will be provided by each team member? (See FAR 8.406-1) 	<p>The order meets all FAR order placement requirements.</p> <p>Answer “Yes” to Question B.14.</p> <p>Return to Checklist B.</p>
<p>Otherwise the answer to Question B.14 is “No” or “N/A.” If you select “N/A,” you should be able to explain your rationale. Return to Checklist B.</p>			

B.15 When a Schedule blanket purchase agreement (BPA) is used, does the BPA meet all Federal Acquisition Regulation (FAR) requirements?			
Quest	Situation	Related Questions	Then
B.15.1	If your answer is “YES” to ALL the following questions:	<ul style="list-style-type: none"> • Is the person who signed the BPA for the ordering activity a: <ul style="list-style-type: none"> ▪ Warranted contracting officer; ▪ Governmentwide commercial purchase card holder acting within authorized limits for card use; or ▪ Person otherwise authorized by the ordering activity to order using GSA Schedules? • Prior to placing the order, does the purchaser ensure that the regulatory and statutory requirements of the requiring agency have been applied? (See FAR 8.404(c)(3)) • Is the BPA prepared using a Standard Form 1449 or other authorized form? (See FAR 12.204(a)) • Does the BPA address the following in addition to any information required by the Schedule contract: <ul style="list-style-type: none"> ▪ Frequency of ordering; ▪ Invoicing; ▪ Discounts; ▪ Requirements (e.g. estimated quantities, work to be performed); ▪ Delivery locations; and ▪ Period of the agreement? (See FAR 8.405-3(a)(2)) • If the BPA is for hourly rate services, does the BPA include: <ul style="list-style-type: none"> ▪ A statement of work (SOW) for requirements covered by the BPA; and ▪ Hourly rates for the performance of the tasks identified in the SOW? (See FAR 8.405-3(b)(3)) • Is the period of the BPA five years or less? (See FAR 8.405-3(c)) • If the period of the BPA extends beyond the current period of the Schedule contract, is the period less than the period of the current contract plus any available option periods? (See FAR 8.405-3(c)) 	<p>The order meets all FAR order placement requirements.</p> <p>Answer “Yes” to Question B.15.</p> <p>Return to Checklist B.</p>
Otherwise the answer to Question B.15 is “No” or “N/A.” If you select “N/A,” you should be able to explain your rationale. Return to Checklist B.			

Handout F: Think Simplified (Not FAR Part 15)¹

*If You Use FAR Part 15-Like Terminology and Procedures for Schedule Procurements, Courts and GAO Will Hold You to Those Part 15 Standards!*²

FAR Part 15 does not govern orders placed against the GSA Schedules. But where an agency issues a Schedule order using Part 15-like terminology and procedures, the GAO and the courts will look to FAR Part 15 to assess the propriety of the agency action in the event of a protest against the order.

For Schedule orders/BPAs, agencies *need not*:³

- comply with *anything* in FAR Part 15
- conduct a formal “negotiated procurement”
- issue a “solicitation” for thirty days (or any other pre-determined time)
- conduct a “competition”
- conduct a formal evaluation
- undertake a cost/price realism analysis
- seek contractors outside the Schedules program
- synopsise the requirement
- conduct a price evaluation on quotes Schedule rates (e.g., hourly rates)
- conduct “discussions”
- prepare extensive documentation
- conduct a formal debriefing
- determine the “competitive range” (FAR 15.3)

The cost of proposal preparation is a major consideration in the Schedule contractor’s decision to quote. With the fully-loaded (ceiling) hourly rates GSA has negotiated, the contractor has assumed only the “normal” bid and proposal costs expected for a fully-streamlined procedure. Asking for more in task order/BPA quotes risks a “no quote” from a Schedule contractor unable to recover those costs. Examples of quote obstacles to be removed include:

- unnecessarily short proposal response times
- unduly burdensome proposal instructions (oral and written)
- excessive number of evaluation factors/subfactors
- acronym filled statements of work only the incumbent can understand
- asking for *cost proposals*, cost and pricing data, or anything requiring an audit
- using FAR 15.3 concepts and procedures

¹ Adapted to Schedules order and all footnotes added by david.clemens@gsa.gov, 12/20/2007, partially based on a similar document for GWAC orders (original author unknown).

² *CourtSmart Digital Sys., Inc.* B-292995.2, B-292955.3, Feb. 13, 2004; *ACS Government Solutions Group, Inc.*, B-282098.2, B-282098.3, June 2, 1999.

³ *Ellsworth Associates, Inc. v United States*, 45 Fed. Cl. 388 (1999); *Computer Products, Inc.*, B-284702, May 24, 2000; *Intelligent Decisions, Inc.*, B-274626.2, December 23, 1996; *ViON Corporation*, B-283804.2, January 24, 2000.

Not using FAR 15.3 concepts and procedures has the following implications for your task order selection process:

1. There is no requirement to set a “competitive range” using all the published evaluation factors. This means that you can save yourself and the Schedule contractor considerable time and money by phasing your procurement in a manner that uses the least costly factors to initially down-select the quoters. For example, after providing your RFQ, you could initially down-select based upon a 10 minute telephonic presentation of an “overall concept.” Then, in a subsequent phase, you could obtain more detailed information such as a price quote (or, in a BPA, simply an offered discount below the *Advantage!*[®] price for all orders) or technical description for those contractors remaining.
2. Since a competitive range is not established, there is no need to be overly focused on the nature of exchanges with the offerors. Ordinarily, in a FAR 15.3 procurement, the Contracting Officer draws a distinction between “communications” and “discussions.” There need be no such caution on a Schedule order. You can engage in detailed exchanges about any aspect of a quote at any time. Naturally, you should make every effort to treat each quoter equitably. You must not be biased, arbitrary, or capricious and your decisions must be adequately (but not overly) documented. Protests are possible, but the risks are lower if you streamline the procurement as much as possible. But the biggest risk is that the Schedule contractor will simply refuse to quote if you are perceived as undermining the integrity of the procurement process.
3. There is no requirement to capture “The relative strengths, deficiencies, significant weaknesses, and risks supporting proposal evaluation...” as required in FAR 15.305. This means your evaluation system can be very streamlined. For example, you can use any evaluation system you wish such as pluses and minuses or simply narrative statements as long as you fully justify your ultimate selection.
4. You are not bound by the rules in FAR 15.3 for evaluating past performance, such as the requirement to provide a neutral rating to a quote without any past performance. Further, if you choose not to use past performance as an evaluation factor, there is no requirement to document the file with your rationale.
5. There is no requirement to follow the FAR 15.305 requirement to “evaluate competitive proposals and then assess their relative qualities.” In other words, your evaluation system can immediately compare (and remember, we don’t say “compete” because the CICA requirements have already been met) one quote to another in order to determine the rank ordering for selection. There is no need to first consume time rating each quote independently against the evaluation factors before making a comparison. This significantly speeds the evaluation process. Of course, you must evaluate the way you said you would in your task order/BPA RFQ.

Handout G: Resources for Schedules Information & Training¹

1. Read FAR SubPart 8.4. (It's not too long and very important.)
2. Read the *Multiple Award Schedules Desk Reference (2008)* [and then order some copies for the office]. (Publication #5-08-00265 ordered at <http://apps.fas.gsa.gov/cmls/index.cfm>)

Official:

[http://apps.fss.gsa.gov/cmls/search.cfm?keyword=MAS%20\(Multiple%20Award%20Schedules\)%20Desk%20Reference%20Guide](http://apps.fss.gsa.gov/cmls/search.cfm?keyword=MAS%20(Multiple%20Award%20Schedules)%20Desk%20Reference%20Guide)

With commentary notes:

<http://www.schedulesolutions.net> under References

3. Use the GSA Websites (FAQs & Tutorials)

- a. www.gsa.gov/schedules (check out the FAQs there)
- b. *Schedules eLibrary* (<http://www.gsaelibrary.gsa.gov>)

- For information on a particular Schedule (SIN descriptions and list of contractors holding that SIN) pull-down Schedule name/number from *Quick Schedule* in upper right or from *Federal Supply Schedule Listing*
- Clicking on a contractor name gives information on that company's Schedule contract (or contracts), including contact information for both the company and for the GSA Contracting Officer.
- Use the search text box at the *Schedules eLibrary* home page to search by contractor name, Schedule contract number, or words in a SIN description (but not the text in a contractor's pricelist directly - - use *Advantage* for that).
- At a contractor's *eLibrary* page (showing SINs awarded), click on "Contract Terms & Conditions" to open up that particular contractor's price list (labor categories and rates for preparation of Government Estimate or for market research).

c. *GSA Advantage!*® (<http://www.gsaadvantage.gsa.gov>)

- Use search text box (*Advanced Search* is useful) at *GSA Advantage!*® home page to search for PWS-relevant words in contractor's Schedule price lists.
- Remember to select search in "Services" (pull down) to limit results just to services.
- An **improved Advantage-based search mechanism** optimized for more productive searches of GSA contractor price lists can be found at <http://sites.google.com/site/advantageplusbeta/>²

¹ Updated 2/17/2009, david.clemens@gsa.gov

² Thanks to Jon Bearscove of GSA/FAS Region 10 for creating this useful enhanced *AdvantagePlus!* search engine.

- Always check a Schedule contractor's Task Order price quote against their GSA-approved *Advantage!*®-posted contract pricelist. The only assurance you have that a contractor was actually awarded a SIN, a labor category, or a particular (ceiling) price is to see that pricelist on the *GSA Advantage!*® website.
- *Advantage!* is also an ordering method for products or for some very simple services not requiring a PWS.

d. *eBuy* (<http://www.ebuy.gsa.gov>)

- A Schedule RFQ system also very useful for *Requests for Information* notices. Use it in the same way we would use a *Sources Sought* notice on FedBizOpps for non-Schedule market research (like posting a draft PWS for industry comment).
- A good method to communicate requirements to all holders of a particular SIN, either a new requirement or as part of market research.
- Can attach PWS or drawings to an *eBuy* RFQ (5MB limit for each document)
- Learn about using *eBuy* for RFQs by selecting *eBuy Training* and then *Buyer Tutorial*

2. Take the Online Schedules Ordering Course (one for Services, one for Supplies)

Register at <http://cae.gsa.gov>:

The screenshot shows a Microsoft Internet Explorer browser window displaying the GSA The Center for Acquisition Excellence website. The page title is "Home - Microsoft Internet Explorer". The address bar shows the URL: <http://centerforacquisitionexcellence.fas.gsa.gov/Kview/CustomCodeBehind/PersonalHomepage/PersonalHomepageStart.aspx>. The page content includes a navigation menu on the left with options like "My Workspace", "Learning Center", "Course Catalog", "Tests", "Training Facilities", and "Other Training". The main content area is titled "My Homepage" and features several sections: "Online Courses" (with a link to "Using GSA Schedules - Customers (Services)" dated 4/10/2007), "Assigned Training", "My Shortcuts", "My Functions", "Curriculums", "Collaboration Spaces", "Scheduled Training", "Announcements" (with a welcome message and "HELP DESK" link), "My Contacts", "Distribution List", "Documents" (with links to "Basic Schedule Ordering Guidelines", "Commercial Sales Practices - Yes! Discount Schedule and Marketing Data - No 1.", "Contractor Team Arrangements (CTAs)", and "Corporate Team Leaders List"), and "Blogs". The bottom of the browser window shows the Windows taskbar with the Start button, various application icons, and the system tray displaying the time as 12:07 PM.

- a. Download the GSA Order Checklist from *Documents*.
- b. Take the free online course “*Using GSA Schedules – Customer (Services)*”
- c. Also check out the *Performance Based Acquisition Toolkit*.

3. Contact Your Local GSA Customer Service Director (CSD)
(<http://www.gsa.gov/csd>)

4. Contact the GSA Schedules Contracting Officer/Acquisition Center

(every Schedule contract has a CO [see *Schedules eLibrary*] and every Schedule has a Business Management Specialist [see that Schedule’s webpage at gsa.gov])

5. Attend the 2009 GSA EXPO, June 9-11, 2009, San Antonio TX.
(www.expo.gsa.gov)

6. Attend our free online webinar on March 25, 2009
<http://schedulesolutions.net/2009/01/14/march-25-2009-webinar.aspx>

7. Listen to Our Podcast Episodes – Read and Comment on Our Blog “Services Ordering Solutions: Avoiding MAS Confusion”
(www.schedulesolutions.net) includes Schedule myths and written program notes for all (currently six) episodes posted:

- a. Acquisition Planning for Schedule Services (27 min.)
- b. Scope & Market Research for Schedule Orders (50 min.)
- c. The Request for Quotations (47 min.)
- d. Ordering Procedures for Task Orders (1 hr. 6 min.)
- e. Socioeconomic Programs and Schedules (41 min.)
- f. What Does GSA Do to Award/Administer a GSA MAS Contract? (33 min.)
- g. (coming soon in Spring 2009) Contractor Teaming Arrangements

8. Read a Book/Learn from the Experience of Others

- a. Chierichella, J. and J. Aronie. *Multiple Award Schedule Contracting*, Xlibris, 640 pp., 2006.
- b. *Where in Federal Contracting* (<http://www.wifcon.com>) under the Discussion topic “GWACS, MACS, GSA Schedules, IDIQs.”