

Preparing a Quality Professional Services Offer

GSA Management Services Center
Auburn, WA

Session Objectives

- Review of key professional services proposal instructions
(Provision SCP-FSS-002)
- Brief overview of scope of services covered under Schedules 738 II (Language Services), 871 (Professional Engineering Services), 874 (MOBIS), 874 V (LOGWORLD), and 899 (Environmental Services)
- Additional Suggestions & Requests
- Q&A/Discussion/Wrap-up

Proposal Instructions

Key Points of SCP-FSS-002 Specific Proposal Instructions

- Section I Administrative/Contract Data
 - SCP-FSS-002 (3). The Authorized Negotiators on the agent authorization letter must match the names of the authorized negotiators (those who are not employees) on all other offer documents (i.e. Offeror Response Document)
 - SCP-FSS-002 (5) & (6). If the firm has not had a GSA cancellation or rejection notice within the last two years, or the firm does not have a current schedule, the response should be N/A. All items must be addressed.

Key Points of SCP-FSS-002 Specific Proposal Instructions (Continued)

- Section I Administrative/Contract Data
 - SCP-FSS-002 (3). The Authorized Negotiators on the agent authorization letter must match the names of the authorized negotiators (those who are not employees) on all other offer documents (i.e. Offeror Response Document)
 - SCP-FSS-002 (5) & (6). If the firm has not had a GSA cancellation or rejection notice within the last two years, or the firm does not have a current schedule, the response should be N/A. All items must be addressed

Key Points of SCP-FSS-002 Specific Proposal Instructions (Continued)

- Section I Administrative/Contract Data
 - SCP-FSS-002 (11). Submit a copy of firm's most current (audited if possible), two years of financials.
 - Include balance sheet and income statement
 - Provide explanation for negative financial information including negative equity or income and financial ratios that are out of range

Key Points of SCP-FSS-002 Specific Proposal Instructions (Continued)

- Section I Administrative/Contract Data
 - Profit Margin Ratio: $\text{Net Income} / \text{Net Sales}$
 - Normative Industry Range (per creditguru.com):
1.29 - 1.75 higher is better
 - Current Ratio: $\text{Current Assets} / \text{Current Liabilities}$:
 - Normative Industry Range (per creditguru.com):
1.18 - 1.36 higher is better
 - Debt to Equity Ratio: $\text{Total Liabilities} / \text{Owner's Equity}$:
 - Normative Industry Range (per creditguru.com): .72 - 1.11 lower is better

Key Points of SCP-FSS-002 Specific Proposal Instructions (Continued)

- Section II Technical Proposal
 - GSA has developed proposal templates that allow you to “fill in the blank” and attach required documents
 - We encourage you to use the templates to be sure your offer is complete
 - If you elect to not use the templates, ensure your proposal follows all the requirements in SCP-FSS-002

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Key Points of SCP-FSS-002 Specific Proposal Instructions (Continued)

- Section II Technical Proposal
 - Factor Two Relevant Project Experience:
 - Two Projects Per SIN Offered – each project must be accompanied by the statement of work.
 - SOW must be original – may highlight applicable portion.
 - Projects completed within last two years or ongoing.
 - Ongoing projects must have base year complete

Key Points of SCP-FSS-002 Specific Proposal Instructions (Continued)

- Section II Technical Proposal
 - Factor Three Past Performance:
 - Must include copy of Open Ratings order form with list of references.
 - Address any negative feedback – even if you don't know the source of the feedback.
 - Customer Reference list should include at least one point of contact from the project description customer reference information.



Key Points of SCP-FSS-002 Specific Proposal Instructions (Continued)

- Section III Price Proposal
 - (c) 8 Labor Category Descriptions:
 - Must support services offered.
 - There must be description for every category offered on Document 8
 - Labor category descriptions should highlight major duties/responsibilities
 - Must contain minimum education and experience requirements that match minimum education and experience requirements on Document 8.

Key Points of SCP-FSS-002 Specific Proposal Instructions (Continued)

- Section III Price Proposal
 - 10 (c) Commercial Sales Practice Format:
 - Estimated annual sales must match all other offer documents.
 - If firm checks yes to 3A confirming that the prices offered to GSA are equal to or better than pricing offered to any other customer, the pricing offered in Document 8 (IFF included) must support this answer.

Key Points of SCP-FSS-002 Specific Proposal Instructions (Continued)

➤ Section III Price Proposal

- (c) 12 Invoices:
 - Must provide supporting documentation for each proposed labor category (e.g. Invoices).
 - Provide mapping or crosswalk information if labor categories and titles on invoices are not the same.
 - You must show that the document supports/validates each labor category and price
 - Major reason for rejection is invoices do not support offered labor categories or conflicts with document 8

Key Points of SCP-FSS-002 Specific Proposal Instructions (Continued)

- Section III Price Proposal
 - Firms must submit Professional Compensation Plan in accordance with (c) 13.
 - In pricing section (c) 14, Firms must submit a copy of the offeror's policy that addresses Uncompensated Overtime in accordance with clause 52.237-10.

Individual Schedule Scope Overview

Professional Engineering Services (PES)

- Engineering Disciplines
 - Chemical
 - Civil
 - Electrical
 - Mechanical
- Engineering Sub-Disciplines
 - Aerospace
 - Biotechnology
 - Aeronautical
 - Marine/Naval
 - Mining
 - Petroleum
 - Industrial
 - Fire Protection

Professional Engineering Services (PES)

- 871-1 Strategic planning for technology programs & activities
- 871-2 Concept development & requirements analysis
- 871-3 System design, engineering, & integration
- 871-4 Test & evaluation
- 871-5 Integrated logistics support
- 871-6 Acquisition & life cycle management
- 871-7 Construction management

Professional Engineering Services (PES)

- Services not within the scope of the PES Schedule
 - Architecture and engineering services under the Brooks Act, FAR Part 36.
 - Products, services, & materials already solicited under other FSS Schedule contracts (IT, environmental advisory, hazardous materials management advisory, paper, chemicals, pharmaceuticals, laboratory instruments).
 - Research & Development if Cost-Type required.

Professional Engineering Services (PES)

- FAR Part 36
 - Construction and Architect-Engineering services as set forth in FAR Part 36 (including construction of buildings, structures, or other real property) are outside the scope of all GSA Schedules, including PES.
 - Some Schedules (but not PES) include SIN for “Ancillary Repair and Alteration”
 - Carefully review FAR 36.601 definition of A&E for applicability to your PWS.

Logistics Worldwide Services (LogWorld)

- 874-501 Supply and Value Chain Management (including acquisition logistics)
- 874-503 Distribution and Transportation Logistics
- 874-504 Deployment Logistics
- 874-505 Logistics Training
- 874-506 Support Products
- 874-507 Operations and Maintenance Logistics Management & Support
- 874-597 Ancillary Repair and Alteration

Logistics Worldwide Services (LogWorld)

- Ancillary Repair & Alteration SIN
 - Work is incidental to the order.
 - Work is not new or major construction.
 - Work is not complex or related to a significant portion of the facility.
 - Work is not A&E services (FAR 36.601-4).
 - Work is not in space leased by GSA PBS.
 - Work >\$100k in a PBS-managed space requires delegation of authority.

Logistics Worldwide Services (LogWorld)

- Some LOGWORLD Tasks Examples
 - Design & Fabrication (in support of a logistics effort/ process).
 - System Testing.
 - Range & Communications Engineering (But any IT must be related to logistics application/task. No volume purchases or software development not related to Logistics tasks).
 - Remote site logistics support (National & International).
 - Food Service / Motor Pool / Courier Service.

Logistics Worldwide Services (LogWorld)

- Services not within the scope of the LogWorld Schedule
 - Manufacturing (but LOGWORLD can manage manufacturing process).
 - Security (if not part of a larger logistics support task)
 - Engineering Services.
 - IT systems integration, network services.
 - Volume purchase of IT hardware.
 - Software development, database design not specifically related to logistics.
 - Household goods moving/storage.
 - Commercial passenger airline services.
 - Local package delivery (Schedule 48: FedEx, UPS, etc.).

Language Services

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

Language Services

- Services not within the scope of the Language Services Schedule
 - Training not related to languages (MOBIS)
 - Medical transcription services (Schedule 36).

Environmental Services

- 899-1 Environmental Consulting Services
- 899-3 Environmental Training Services
- 899-5 Materials and Waste Recycling & Disposal Services
- 899-7 Geographic Information Systems (GIS) Services
- 899-8 Remediation and Reclamation Services

Environmental Services

- Some Environmental Services Examples
 - Environmental Impact Statements.
 - Develop environmental programs or regulations.
 - Risk Analysis or Vulnerability Assessments.
 - Environmental Compliance Audits.
 - Environmental Training.
 - Permitting.
 - Waste Management Plans or Studies.
 - Establish/operate HAZMAT, electronics, CRT, battery or chemical recycling programs.

Environmental Services

- Services not within the scope of the Environmental Services Schedule
 - Any task typically requiring construction labor categories (e.g., lead paint/asbestos remediation).
 - Architect & Engineer services.
 - Remediation requiring construction (e.g., removing drywall, removing lead paint).
 - Radioactive/nuclear waste.
 - Office trash and land-fill items.
 - Water purification equipment.
 - Landscaping

Mission Oriented Business Integrated Services (MOBIS)

- 874-1 Consulting Services
- 874-2 Facilitation Services
- 874-3 Survey Services
- 874-4 Instructor Led Training, Web Based Training & Education Courses, Course Development and Test Administration
- 874-5 Support Products
- 874-6 Acquisition Management Support
- 874-7 Program Integration and Project Management Services
- 874-8 Certified Acquisition Workforce Training
- 874-9 Instructional Training Devices

Mission Oriented Business Integrated Services (MOBIS)

- Some MOBIS Tasks Examples
 - Business Process Re-engineering.
 - Strategic & Business Planning.
 - Benchmarking.
 - Procurement Support & 1102 Training.
 - Business Project Management.
 - Executive/Leadership Coaching
 - Tabletop Scenarios/Wargaming

Mission Oriented Business Integrated Services (MOBIS)

- Must be mission oriented.
- Must be a business service.
- Preponderance of work not already covered under another schedule.

Mission Oriented Business Integrated Services (MOBIS)

- Services not within the scope of the MOBIS Schedule
 - Financial Management and Financial Audits.
 - Engineering Services.
 - IT Systems Integration and Network Services
 - IT Hardware/Software not specifically related to MOBIS consulting/project management efforts.
 - Administrative Support (unless directly related to MOBIS consulting/project management efforts).
 - Human Resources Services/HR ADR.
 - Inherently Governmental Functions/Organizational Conflict of Interest (esp. in 874-6 acquisition support).

Top Tips

- Use templates provided or develop your own to ensure the offers submitted comply with proposal instructions.
- Call/e-mail GSA if there are scope questions *prior to* submitting offer (see next page for contacts).
- Have a Quality Control review process for all proposal documents.
- Provide timely responses to GSA clarification requests.
- Take “Marketing Matters” free webinar at <http://interact.gsa.gov> on marketing to federal government
- Due to volume of offers received, it takes 9-10 months to award most offers; your patience is appreciated!

Management Services Center Points of Contact

Mission Oriented Business Integrated Services (MOBIS)
Schedule 874 / TFTP-MC-000874-B / mobis@gsa.gov

Professional Engineering Services (PES)
Schedule 871 / TFTP-MC-990871-B / pes@gsa.gov

Language Services
Schedule 738 II / TFTP-GC-017382-B / language@gsa.gov

Environmental Services
Schedule 899 / TFTP-EW-990899-B / environmental@gsa.gov

Logistics Worldwide (LOGWORLD)
Schedule 874 V / TFTP-MB-008745-B / logworld@gsa.gov

Consolidated Schedule Schedule
00CORP / FCO00CORP0000C / consolidated@gsa.gov

(800) 241-7246