



**U.S. ARMY CONTRACTING AGENCY**



# Field & Installation Readiness Support Team (FIRST) Contract Multiple Award ID/IQ

## Training Presentation



*Supporting Soldiers Through Contracting*

Army Contracting Agency,  
Southern Region

ACA



# FIRST Trainers



Supporting Soldiers Through Contracting

## **Mr. Heven Ford**

Administrative Contracting Officer, FIRST Contract  
and Deputy Director  
Southern Region Contracting Center - East

## **Ms. Pauline Pituk**

Senior Procurement Analyst  
Army Contracting Agency –Southern Region  
PARC Office

## **Mr. Ronnell Booker**

Procurement Analyst / Client Advocate  
Army Contracting Agency – Southern Region  
PARC Office



# Objective



Supporting Soldiers Through Contracting

The purpose of this training is to teach requiring activities and contracting offices on the benefits and effective use of the Field and Installation Readiness Support Team (FIRST) Contract, and to assist with the preparation of actual Task Order Requests (TORs)



# Agenda



Supporting Soldiers Through Contracting

**0830 – 1130**

## **FIRST Training**

Background of FIRST

Benefits of Using FIRST

Requirements and Task Area Descriptions

“Suites” of Contractors

The Ordering Process (Requirement, evaluation, and award)

An Example Requirement

List of Current Requirements

**1300 – 1430**

## **Task Order Training**

How to use Multiple Award Contracts

Submission and Review Requirements

Evaluation Considerations

Award decisions



# Agenda



Supporting Soldiers Through Contracting

**1430 – 1600**

## **Working Group Session**

Assist activities and contracting with Task Order development

**9 May**

**0900 – 1200**

## **Working Group Session**

Assist activities and contracting with Task Order development

***Note: Personnel who are not directly involved with preparing the task order requests will be required to leave the working group sessions***



# Introduction



Supporting Soldiers Through Contracting

The United States Army's logistics mission is to provide the right support, on time, in the right condition and quantity to America's Army – in peace and war. Contractor support has been a key factor in the Army logistics support plan. The types and levels of support have evolved from providing supply items, to provision of individual components and equipment, to the operation of large logistical support facilities, and will continue to change as the Army evolves. **However, one imperative will remain constant – the imperative that logistic functions be performed quickly and accurately in support of unit readiness requirements.**



# Logistics Environment



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## Logistical organizational, battlefield, and global environment is fluid

- Logistical organizations are adapting to support the Army transformation to a smaller, modular Army
- Logistics have had to respond quickly from mobilization/demobilization to combat support and subsequently to peace-keeping/reconstruction
- Global War on Terrorism



# Logistics Environment



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**Army is increasingly relying on industry to assist in providing dynamic logistical services and quickly delivering vast quantities of materiel**

**Overlapping mission support solutions increase costs, reduce efficiencies and strain limited resource of Government and industry**

**Lack of common approaches to satisfy requirements creates confusion regarding applicable standards, enforcement of standards and terms and conditions of multiple contracts**





# Lessons from the Past



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## Prior arrangements (e.g., LOGJAMSS, CFT, DOL contracts, USARC orders, etc):

- Did not adequately gauge the size, scope and evolution of logistics requirements
- Failed to consider changes in the industry and client base during life of the contracts/orders
- Lacked methods of educating and advising the industry/client base on the characteristics of available contract vehicles
- Lacked methods of tracking performance of contract arrangements
- Did not encourage industry to be an investor instead of a beneficiary in Army logistical solutions -- Industry stake must be more than financial

***Requires a more effective business arrangement !***



# Objectives of FIRST



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- Develop and administer Multiple Award ID/IQ contracts using acquisition techniques that:
  - Provide a means to strategically consider the most effective method of satisfying reoccurring logistical support requirements
  - Reduce logistics footprint
  - Acquire logistic support services at reasonable cost/price
  - Aid in conforming to performance-based acquisition directives
  - Provide a means of expeditiously satisfying logistical support requirements
  - Support the socio-economic goals of the Army
  - Enhance customer satisfaction with end products/services
- Maintain a qualified and competitive industry base throughout the life of the FIRST program that represents all socio-economic categories
- Create a process to continuously educate clients and industry on the proper use and benefits of the FIRST program



# Enterprise Solution - FIRST



Supporting Soldiers Through Contracting

## Joint venture between Army Contracting Agency and its Core Clients\*

- FORSCOM, IMCOM, USARC, First Army, and Third Army

\* AMC added as participant

- **Approval of Acquisition Strategy approved by the Deputy Assistant Secretary of the Army, Policy and Procurement (DASA P&P)**

- **Program approach**

- Administer the acquisition like a program – centralized oversight and program-level metrics (in addition to task order metrics)
- Executed through multiple award ID/IQ contracts
- Four consecutive competitions, each with 5 –year ordering periods and 2 one-year stop-gap option periods – new acquisition strategy required for each competition
- Initial competition executed via two RFPs; Small Business Setaside and Full and Open Competition

– **\$9B ceiling across ALL contracts (34 Contracts)**



# Enterprise Solution - FIRST

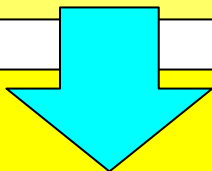


Supporting Soldiers Through Contracting

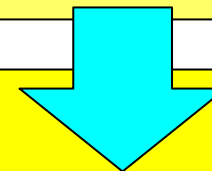
## Levels of Contract Administration for Enterprise Solutions

### Program (or Contract) Level – the 34 Contracts

- Manage overall success or “health” of contract or contracts (if multiple-award)
- Assist / train other contracting offices and customers on the use of the contract(s)
- Ensure equity in all task order competitions; resolve contractor-related issues
- Manage periodic reports, track overall contractor performance, and adherence to other basic contract terms and conditions (e.g., Sub-contracting goals)



### Task Order Level



- Ensure contractor meets performance requirements as stated in PWS / SOW
- Track and verify contractor payments and task order cost
- Ensure contractor performance is reported in past performance repositories
- Perform contract modifications and manage other task order terms and conditions



# FIRST – Enterprise Solution



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## **Funding is provided at the task order level**

- preference is full funding for period
- incremental/partial funding possible; tracking responsibility of TO KO

## **Decentralized ordering when delegated authority; blanket delegations and individual delegations possible**

- must agree to terms of delegation
- must agree to program-level oversight
- must agree to Task Order Ombudsman review and decision



# FIRST Task Areas



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**Task Area 1: Logistics Program Management and Operations**

**Task Area 2: Logistics Quality Assurance Support**

**Task Area 3: Logistics Information/Technology Support**

**Task Area 4: Logistics Training Support**

**Task Area 5: Logistics Army Transformation Logistics Support**

**Task Area 6: Logistics Program Support**



# FIRST Task Areas



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**Task Area 7: Logistics Transportation/ Supply Support**

**Task Area 8: Logistics Parts Support – Sets, Kits and Outfits**

**Task Area 9: Support to Directorates of Logistics / Installation Management Agency**

**Task Area 10: Logistics/ Maintenance – All Other Organizations**

**Task Area 11: Comprehensive Support for Centrally Managed Programs**

**Task Area 12: Command Wide Logistics Enterprise System Program Support**



# FIRST Competition



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**All Program Logistics Requirements (12 Task Areas)**

**Small Set-Aside Competition**

- 5 Task Areas solely for SB
- 5 Areas shared with LB

**Total of 10 Task Areas**

*ID/IQ Awards 6 Feb 2007*

***“Restricted Suite”***

**18 Small Business Contractors**

**Unrestricted Competition**

- 2 Task Areas aimed at LB
- 5 Areas shared with SB

**Total of 7 Task Areas**

*ID/IQ Awards 6 Feb 2007*

***“Unrestricted Suite”***

**16 Large Business Contractors**

**Dedicated Industry Base of  
34 Contractors !**





# Scope of Services



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## Restricted Suite

### Dedicated Task Areas

- Quality assurance support
- Training support
- Army transformation logistics support
- Programmatic support
- Kitting and parts assembly support

(for requirements \$5 million/year or less)

- Program management and operations
- IT support for logistics systems
- Transportation/supply support
- Installation logistics support
- Field maintenance support

## Unrestricted Suite

### Dedicated Task Areas

- Comprehensive support for centrally managed programs
- Command-wide logistics enterprise system program support

(for requirements over \$5 million/year)

- Program management and operations
- IT support for logistics systems
- Transportation/supply support
- Installation logistics support
- Field maintenance support

**Shared  
Task  
Areas !**



# Task Order Competition



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## *Which Task Area ?*

What task area is the predominance of the requirement?

- By dollar value ?
- By estimated or historical level of effort ?
- Amount of needed contract administration (COR effort) ?

***Task Order Contracting Officer Decision !***

## *Which Suite ?*

Did Task Order KO put the requirement in one of the “shared” task areas (Task Areas 1, 2, 7, 9, or 10) ?

- If task order valued over \$5 Million / year, then requirement goes to Unrestricted Suite
- If task order valued at \$5 Million / year or less, then goes to the Restricted Suite
- Otherwise, it is competed in the suite that has the associated dedicated task area

***Remember: No competition among suites !***



# What Task Area?



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## Example:

*A requirement for contract personnel in a repair parts (Class IX) warehouse valued at \$ 7 Million for a 5-year period of performance*

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*Task Order Contracting Officer, by advice and information provided by the customer, decides based on predominance of the requirement:*

***Task Area 7 - Transportation / Supply Support  
(a shared task area)***

*The competition “suite” due to estimated dollar value is:*

***Restricted Suite (\$1.4 Million / year)***



# FIRST - Industry Base

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## Restricted Suite Awardees

<b>Accent Control</b>
<b>Allen Corporation</b>
<b>Automation Precision Technology</b>
<b>Data Solutions &amp; Technology</b>
<b>DUCOM</b>
<b>Expeditionary Technology</b>
<b>HCI Integrated Solutions</b>
<b>ITG/SP</b>
<b>Logis-Tech</b>

<b>Logistics Management Resources</b>
<b>Logistics Solutions Group</b>
<b>Orion Technology</b>
<b>Premier Professional</b>
<b>Strategic Resources International</b>
<b>System Studies and Simulation</b>
<b>The Ginn Group</b>
<b>The Logistics Company</b>
<b>Unified Consultants Group</b>



# FIRST - Industry Base



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## Unrestricted Suite Awardees

<b>AT&amp;T</b>
<b>Battelle</b>
<b>CACI</b>
<b>Defense Support Systems</b>
<b>Dimensions International</b>
<b>DYNCORP</b>
<b>Eagle Group International</b>
<b>Honeywell</b>

<b>ITT</b>
<b>Kellogg, Brown, &amp; Root</b>
<b>L3</b>
<b>Lear Seigler, Inc.</b>
<b>Modern Tech Corp</b>
<b>Northrup Grumman</b>
<b>Stanley and Associates</b>
<b>VSE</b>



# Benefits



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## One-stop contract for field and installation level logistics:

- Includes all core field and installation-level logistics functions
- Services may include parts/materials and facilities required to execute services
- Kitting/Parts – ability to “package” kitting/equipment upgrade requirements for field dissemination
- CONUS and OCONUS support available
- Offers surge capacity – ramp up or scale down
- Facilitates common levels of service and standards
- Provides for speed, generates efficiencies, and provides much needed flexibility
- Supports centrally managed programs, and de-centralized field-level support
- No fee to use contract. Fees for acquisition support dependent on acquisition support agreement



# Benefits



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## Flexible Task Order Arrangements

- Permits tailoring at the task order level to support development of the most effective method of satisfying reoccurring logistical support requirements (e.g., incentives, surge approach, options)
- Most appropriate contract type determined at the task order level
- CAP on labor rates (regardless of contract type selected at TO level)

Long term objective:  
provide more effective and efficient logistics support



# Benefits



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## Competition

- Provides competition to establish basic contracts and throughout life of the program at the task order level
- Fosters competitive pricing and best value
- Existing base of qualified firms (satisfies depth and breadth of logistics support requirements)
- Deep teams – ability to reach most logistics support contractors





# Benefits



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## Shorter contract lead times

- Acquisition strategy approved at the Program level precludes need for approval of acquisition strategy at the task order level
- Streamlined approach to source selection at the TO level
- Predetermined competition base; e.g. DOL functions >\$5M/yr = Unrestricted Suite
- No protest; however, Ombudsman inquiry possible

**Metrics at the Program and Task Order level to capture effectiveness, efficiencies, best practices, and lessons learned**



# FIRST Ordering Process



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## Step By Step

1. Requirement identified and documented in performance-based format
  - Approvals received (e.g., Sec Army memo re: Acquisition of Services)
  - Funding received
2. Requirements presented to Acquisition Support Office assigned to client
3. Mini Acq Strategy and Task Order Request for Response (TOR) developed
4. Internal reviews accomplished (e.g., legal, PARC, etc)
5. Requirements offered to all applicable contractors (one suite or the other)
6. Responses received
7. Responses evaluated IAW criteria and basis of award in TOR
8. Negotiation, if required
9. Award decision documented
10. Award
11. Monitor Performance



# Task Order Timelines



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- **Objective:**
  - acquisition processing time of 60 days or less (ideal) – currently 90 -110 days
  - time starts with receipt of requirements package suitable for competition
- **Dependencies:**
  - status of requirement
    - clear, performance-based requirements
    - no barriers to competition
    - workload data or other info clear and available
  - approval cycle/time
  - availability of funding
  - workload of acquisition support office
  - ability of acquisition support office to follow streamlined procedures
  - availability of evaluators; time, knowledge, impartiality
  - negotiations vs. no negotiations
  - documentation of evaluation results
  - discrepancies identified during reviews



# Administration



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- The FIRST Program will be administered by Army Contracting Agency, Southern Region (Program level metrics, Ombudsman, etc)
- FIRST Indefinite Delivery-Indefinite Quantity (IDIQ) contracts will be administered by ACA, Southern Region Contracting Center-East
- Task Orders administered by Task Order Contracting Acquisition Support Office



# Program-Level Metrics



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<u>Area</u>	<u>Metric</u>	<u>Target</u>
Competition	Fair Opportunity	90% of task orders awarded
Socio-Economic Goals	Limitation on Subcontracting (restricted suite)	< 50% subcontracted
	Small Business Subcontracting (unrestricted suite)	40% of available subcontracting dollars
Mission Capable	Readiness } Reliability }	Standards in Task Orders met 95% of the time
Client Satisfaction	Satisfaction Survey	95% Satisfied
Cost	Cost Control	99% of Task Orders completed within funded values



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# Ordering Office Information



# General



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Restricted  
Suite

- Task orders competed in one suite or the other
  - see separation of task areas in FIRST Scope of Work
  - TO KO determines which task area is the dominant based upon where majority of services required fall within FIRST Scope of Work
- Acquisition Strategy not required (approved at the basic contract level) – mini-acquisition strategy encouraged
- Follow Part 16 **(NOT PART 15)** procedures
- Pricing Matrix establishes labor categories that may be provided/ordered and CAP (maximum) rates that may be offered/paid
- Subcontract utilization monitored at the Program level – offerors will be proposing solutions that enable attainment of goals

Unrestricted  
Suite

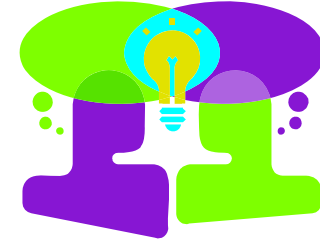


# General (cont'd)



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- Outreach and info exchange prior to release of TOR encouraged (e.g., email seeking interest in participating, draft PWS, TO objectives, acquisition of similar, etc)



- Performance-based requirements statements to include PRS and QASP required to extent possible

- Fair Opportunity
  - provide opportunity to all contractors within suite, not between suites
  - J&A – “Exception to the Fair Opportunity Process” FAR 16.505(b)(2) and DFARS 216.505-70(b)



- Any contract type available
  - hybrids possible; e.g., L/H with reimbursable travel
  - See FIRST website for contractors that have contract type limitations
- Duration of Orders – typically NTE 5 years





# General (cont'd)



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- OCI
  - consider nature of requirement
  - consider impact on other TOs
  - mitigation approach
- COR delegation at the TO level by the TO KO
  - experience, training and knowledge of task order requirements
  - time available to conduct surveillance
  - use of Task Order Monitors in addition to COR



# Requests for Task Order Response



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- Consider use of Request for Task Order Response (TOR)
  - Written response or oral response
  - Tailor responses to necessary information – offerors already “pre-qualified” (e.g., quality control plan should be tailored solely to meet specific TO requirements)
  - Time for response depends on complexity of requirement and information requested from quoters – typically 10 days
  - Part 16 provides exceptions to fair opportunity – will be monitored at FIRST Program level
  - Contract type
    - dependent on requirements, **AND**
    - ability to evaluate and administer
- Clauses may be added at TO level (if no conflict with basic contract); e.g., performance based payment schedule, OCONUS support
- WD/CBA added and administered at TO level

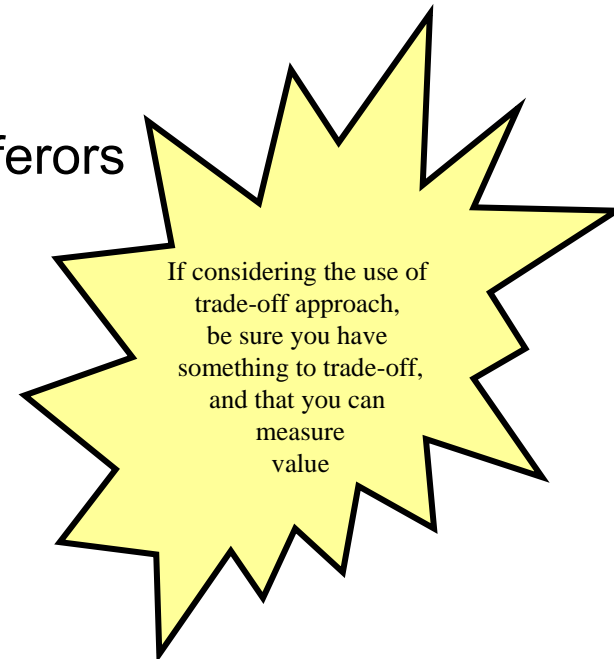
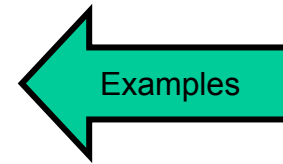


# Evaluation Approach



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- Evaluation approach (Part 16, not Part 15)
  - tailored to requirement
  - include instructions to quoters and eval criteria in TOR
    - best value – trade-off approach
    - low price
    - low price technically acceptable
    - past performance-price trade-off
  - no formal evaluation plans required
  - consider info needed for contract admin, as well as to distinguish value proposed by offerors





# Evaluation Criteria



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- Technical/Management
  - if consider quality – consider quality tailored to TO (basic IDIQ has QC plan)
- Past performance
  - evaluated at basic contract level
  - if needed, consider effort under previous FIRST TOs
- Price/Cost – price is required to be a factor
  - preferred – competition-based within CAP rates
  - alternatives: (typically when limited competition expected)
    - bottoms-up pricing – require offerors to price starting from floor in Pricing Matrix and explain upward adjustment
    - may request offeror provide basis of price – e.g., discount from CAP and rationale for discount
    - situation-based pricing – require offerors to price considering TO environment; location, WD/CBA, etc

**Tailor evaluation criteria to task order requirements !**



# Evaluation



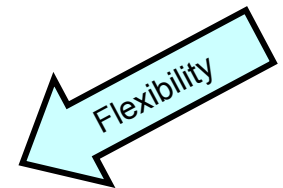
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## Evaluation

- follow evaluation criteria set forth in Task Order Request (TOR)
- no formal scoring required
- document evaluation findings
- document basis of price reasonableness
- document trade-off rationale

Conduct negotiations when deemed beneficial/necessary

- may negotiate with multiple quoters
- no competitive range decision
- may negotiated with apparent successful quoter





# Price Evaluation



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## – Price Evaluation

- evaluate per FAR 15.4
- price analysis most common approach - comparative analysis of task order price based upon task order competition
- CAP rates determined to be fair and reasonable
- rate review to ensure  $\leq$  CAP rates
- labor categories and rates must be within Pricing Matrix (no exceptions!)
- labor categories may be added by FIRST PCO (not instantaneous or retroactive & not added by TO KO)
- cost TOs – additional items:
  - check with DCAA to ensure no infractions since IDIQ award
  - ensure fee within limitations (CPAF)



# Task Order Reviews



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- Reviews:
  - ACASR Organizations: Prior to publication of TOR and prior to award
    - Installations: > \$5M, inclusive of option values
    - Centers: > \$10M, inclusive of option values
    - Required documents:
      - Prior to TOR publications
        - » Mini Acq Strategy
        - » TOR, PWS, PRS, AF Plan (if applicable)
        - » Local legal review
        - » Local internal review (if applicable)
      - Prior to Award
        - » POM/PNM
        - » Draft Task Order
        - » Local legal review
        - » Local internal review (if applicable)
  - Other Acquisition Organizations: Per terms of delegation and organizational requirements



# Current Requirements

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# End of Brief



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# Questions ?



# Questions



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Q: If my current contract is an 8(a) setaside, may I use FIRST?

A: Typically not without dissolving the setaside

Q: May recompetitions of A-76 where industry “won” be executed under FIRST?

A: Yes.

Q: May GOV MEO contractor **augmentation** be accomplished under FIRST?

A: Yes.

Q: Can I separate support requirements to match funding streams?

A: Yes – e.g., via CLIN structure or reporting/request for payment instructions.

Q: Can I provide continuity of service by executing a sole source order?

A: FAR Part 16 indicates “Logical Follow-on” as one of three exceptions to providing fair opportunity. But - ask yourself whether the requirement really a logical follow-on?

- prior requirement must have been competed under FIRST – fair opportunity provided
- is the requirement really a logical follow-on (continuation to stated end state) or just more of the same? Only the first scenario is categorized a logical follow-on
- Example – development of logistics information management system – all FIRST contractors provided opportunity to compete - initial order complete – now need to modify to enhance interface capability



# Questions



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Q: May I consider past performance other than performance under FIRST?

A: Ask yourself why the performance would be relevant

Q: May I use FIRST to obtain support OCONUS?

A: Yes – check for in-theater requirements, limitations and clearance procedures

Q: May I use FIRST to obtain parts?

A: Not solely – parts may be acquired in order to execute the services ordered

A: Yes, if the requirement falls within Task Area 8: Logistics Parts Support – Sets, Kits and Outfits



# Points of Contact



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FIRST Website: [http://www.forscom.army.mil/aacc/FIRST\(L2\)/default.htm](http://www.forscom.army.mil/aacc/FIRST(L2)/default.htm)

## SRCC-E Contracting Support Team:

Contracting Officer: Heven Ford Jr.  
[fordh@forscom.army.mil](mailto:fordh@forscom.army.mil)

(404) 464-2736

Contract Specialist: Ronnell Booker / Melisa Barbee

[ronnell.booker@forscom.army.mil](mailto:ronnell.booker@forscom.army.mil)  
[melisa.barbee@forscom.army.mil](mailto:melisa.barbee@forscom.army.mil)

(404) 464-0926

(404) 464-1028

## ACASR POCs:

Ronnell Booker

[ronnell.booker@forscom.army.mil](mailto:ronnell.booker@forscom.army.mil)

(404) 464-1986

Pauline Pituk

[pauline.pituk@forscom.army.mil](mailto:pauline.pituk@forscom.army.mil)

(404) 464-3199