

Office of Personnel Management

Vendor Communication Plan

This Vendor Communication Plan provides direction to the Office of Personnel Management (OPM) workforce and our vendor community about how to engage and increase dialogue prior to the award of contracts as requested in the Office of Federal Procurement Policy's guidance issued to Federal agencies on February 2, 2011.

I. Statement of agency commitment

The mission of OPM is to recruit, retain and honor a world-class workforce to serve the American people. OPM believes that proper communication with vendors prior to award will position us to obtain better services for the workforce and streamline the acquisition process as it relates to requirements definition, the solicitation phase and the evaluation phase.

OPM commits to the following:

1. Engaging in timely, constructive communication with the vendor community for high-dollar, complex procurement;
2. Including small businesses and subgroups of small businesses in communications with industry through agency postings and vendor outreach efforts;
3. Fostering relationships and encouraging the inclusion of vendors that the agency has not worked with in the past;
4. Identifying in the OPM's Forecast of Contract Opportunities which procurements are likely to involve opportunity for additional communication with industry and publicizing communication engagement opportunities on the Federal Business Opportunities website (www.fbo.gov), including pre-solicitation and/or pre-proposal conferences for procurements that may be high value, high-risk, complex and/or appear to have a limited supplier base; and
5. Protecting non-public information including vendors' confidential information and the agency's source selection information.

II. Identification of senior agency and bureau (if applicable) official responsible for promoting vendor engagement

Office of Personnel Management
Contracting Group
1900 E St NW
Room 1342
Washington DC 20415

William (Neal) Patterson
Director, Contracting Group
Email: william.patterson@opm.gov
Phone: 202.606.1984

III. Brief Description of efforts undertaken or planned to reduce barriers and promote engagement.

Increased communication with the vendor community prior to award is intended to improve the quality of market research and streamline the acquisition process. This increased communication shall be conducted fairly and transparently and comply with all procurement integrity rules.

- A. OPM engages in outreach to industry as part of the acquisition process and will continue. OPM provides opportunities for vendors to participate in pre-award and pre-solicitation conferences such as Industry Days. These conferences allow vendors to hear directly from Program Officials about specific requirements. In Fiscal Year 2011, OPM has conducted at least two (2) industry days for high-dollar, high-visibility procurements for the Health Claims Data Warehouse and the re-competition of the Information Technology Services Blanket Purchase agreements. Outreach hosted by OPM is publicized on the Federal Business Opportunities web site. In addition to hosting outreach events, OPM participates in outreach events hosted by others such as the Veteran's Administration's National Veterans Small Business Conference, the Federal Interagency Office of Small and Disadvantaged Business Utilization (OSDBU) Council Conference.
- B. OPM is taking steps to foster relationships and encourage the inclusion of vendors, especially small businesses, that the agency has not worked with in the past. OSDBU and Policy has reserved one hour on Tuesday and Thursday afternoons for vendor outreach sessions with small businesses. The meetings are an opportunity for small businesses to introduce themselves to OPM (what they do, clients they've worked with, what distinguishes their company from the rest, etc).
- C. OPM has taken steps to ensure program offices/actual decision makers are available during vendor outreach sessions. The Senior Procurement Executive has taken steps to identify a person/people in each program office that should receive vendor outreach meeting invitations from the OSDBU. Once officials are identified, representation at the vendor outreach sessions will be mandatory.
- D. When a requirement has been identified as a potential 8(a) sole source requirement, OSDBU and Policy work with program offices and contracting personnel to identify 8(a) sources and coordinates 8(a) capabilities briefing

sessions that are an invitation for selected vendors to brief their ability to perform the required services understanding that they may or may not be selected to receive the contract award.

- E. In an effort to prevent any misunderstandings regarding communication with vendors, the OPM workforce will be provided with the February 2, 2011 memorandum from the OFPP regarding “Myth-Busting’: Addressing Misconceptions to Improve Communication with Industry during the Acquisition Process”

IV. Criteria for identifying, as a condition of approval by the agency’s investment review board (or similar body), which acquisitions must include vendor input in the pre-award phase and the extent of the required engagement.

Acquisition plans for high-risk, large-dollar and complex programs (i.e., major IT systems and re-competitions) will discuss the vendor engagement strategy in the “Acquisition Streamlining” and “Source-selection procedures” sections. The vendor engagement strategy shall address the following:

- i. Inclusion of at least one industry day, pre-solicitation or pre-proposal conference;
- ii. Approach and strategy to ensure reasonable amount of one-on-one engagement; and
- iii. Approach and strategy for discussions, as needed, in accordance with FAR Part 15 or
- iv. Justification for why steps i, ii and/or iii presented above are unnecessary

Acquisition Plans shall include Milestone Plans that reflect when vendor engagement will occur during the acquisition process.

V. Publication of engagement events to include industry days, small business outreach sessions, pre-solicitation conferences, RFP questions and answer sessions, etc.

- A. OPM will publicize upcoming industry days, small business outreach sessions, pre-solicitation conferences, RFP questions and answer sessions on the Federal Business Opportunities web site as a single portal of information for interested vendors.
- B. In an effort to increase small business participation and awareness, OPM will send emails regarding selected industry days, small business outreach sessions and pre-solicitation conferences to small businesses that have expressed an interest in doing business with OPM.

VI. Description of the roles and responsibilities

- A. The Contracting Officer will be responsible for determining the acquisition strategy for each procurement and engaging the vendor community. The Contracting Officer shall determine the appropriate means of communication for each procurement, including but not limited to, industry days, pre-solicitation or pre-proposal conferences and one-on-one meetings. The Contracting Officer shall ensure that procurement ethics rules are not violated and communicate to the Program Office how vendor engagement will occur. The Contracting Officer shall use information gained during vendor engagement to make acquisition strategy decisions such as source selection process, contract type, level of small business participation, evaluation factors, etc. The Contracting Officer shall collaborate with the Program Office, OSDBU and Policy, the Small Business Procurement Center Representative (SBPCR) and the Office of General Council as appropriate.
- B. The Program Manager (PM)/Contracting Officer's Representative (COR) shall perform market research and coordinate communication with the vendor community with the Contracting Officer. The PM/COR will use information obtained to define requirements as they relate to the current market.
- C. The Office of General Counsel (OGC) also serves as the Ethics Officer. OGC will provide advice regarding how and when to communicate with the vendor community to ensure exchanges are fair, transparent and in accordance with all procurement integrity rules.
- D. The Program Officials perform market research to identify capable small business concerns and establish qualification and evaluation criteria that are within the reach of small businesses and allow adequate lead time for industry days, pre-solicitation, one-on-one engagement and pre-proposal conferences.
- E. The OSDBU will conduct small business outreach conferences and meetings to assist businesses in understanding OPM's business practices.

VI. Training and awareness efforts for employees and contractors

- A. For employees, OSDBU and Policy will address the topic of vendor engagement during OPM's Annual Acquisition Planning Conference which is attended by OPM employees. Additionally, the OPM workforce will be provided with the February 2, 2011 memorandum from the OFPP regarding "Myth-Busting': Addressing Misconceptions to Improve Communication with Industry during the Acquisition Process"

- B. For vendors, the February 2, 2011 memorandum from the OFPP regarding “Myth-Busting’: Addressing Misconceptions to Improve Communication with Industry during the Acquisition Process” will be made available on OPM’s web site.

VII. Links to existing policies

OPM will comply with the Federal Acquisition Regulation when communicating with the vendor community:

<http://www.acquisition.gov/far>

OPM contract policies and regulations are available at the following web site:

<http://www.opm.gov/doingbusiness/contract/policies.aspx>

OPM does not have currently have policy/regulation that covers vendor communication; however, the February 2, 2011 memorandum from the OFPP regarding “Myth-Busting’: Addressing Misconceptions to Improve Communication with Industry during the Acquisition Process” will be made available on the web site.

VIII. Plans to follow-up with employees and industry representatives within 6 months of posting the vendor engagement plan.

- A. OPM will follow-up will seek comments from Contracting personnel via email to gauge the effectiveness of this plan.
- B. Vendors attending industry days, pre-proposal or pre-solicitation conferences will be asked to rate and provide comments regarding how effectively OPM communicates.