



Taskings to SA FIPT WG from SA FIPT (presented to WG at March meeting)

- **Task #1: Lead: Al Colvill (Team: Diane Knight, Nate Washington)**
Consider various services acquisition factors (amount of spend, number of transactions, where the work is done, etc) and consider various options for training based on location; consider the type of services being acquired (major vs minor), etc; determine if there is a need to move beyond the four, basic pre-award roles and consider training needed for post-award management and leadership.
- **Task #2: Lead: Pat Myers (Team: Jerry Pickham, Rob Bolluyt)** Review the Department of the Navy's 2-Pass, 6-Gate Process to see if it can be leveraged for services acquisition.
- **Task #3: Lead: Larry Floyd** What skills are required for large services acquisitions and what specific training might be useful for individuals?

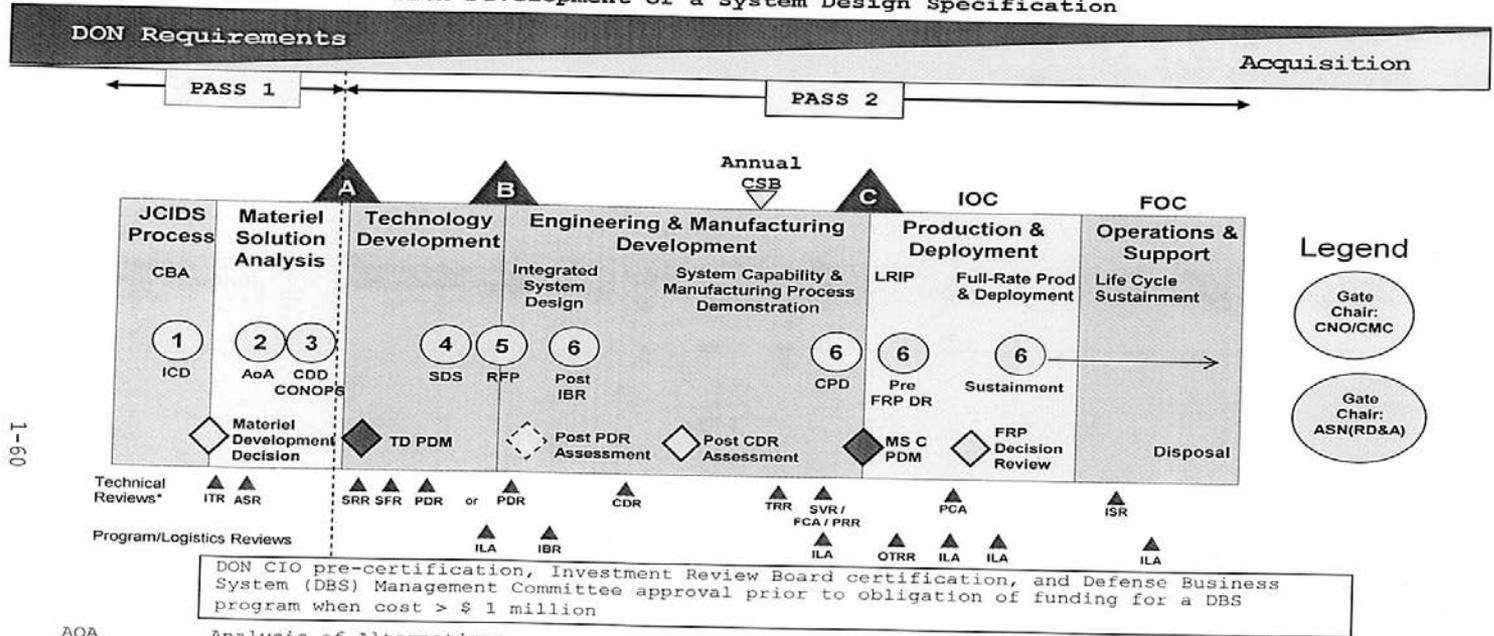


Basic Preaward, Postaward, and Leadership Training

- No additional preaward roles. Each of the current roles may be covered by COR.
- Performance Management: Responsibility of COR, - COR 106/222 provide necessary training (Contracting Officer resp. for COR). May want to recommend for wider audience.
- Leadership: 1. Functional Services Mgr (FSM) 2. Portfolio Mgr
3. Command Level 4. Functional Domain Expert
 - FDEs and FSMs need to recommend necessary functional training. Consider requiring/recommending requirements / acquisition training policy for organizations responsible for aggregate of \$100M or more in requirements.
- ConFIPT work may overlap tasking. WG Team lead coordinating

Two Pass and Six Gate

Annex 1-A - DON Requirements/Acquisition Two-Pass/Six-Gate Process with Development of a System Design Specification



1-60

DON CIO pre-certification, Investment Review Board certification, and Defense Business System (DBS) Management Committee approval prior to obligation of funding for a DBS program when cost > \$ 1 million

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|--------|--------------------------------------|------|-----------------------------------|
| AOA | Analysis of Alternatives | LRIP | Low-Rate Initial Production |
| ASR | Alternative System Review | OTRR | Operational Test Readiness Review |
| CBA | Capabilities-Based Assessment | PCA | Physical Configuration Audit |
| CDD | Capability Development Document | PDM | Program Decision Meeting |
| CDR | Critical Design Review | PDR | Preliminary Design Review |
| CONOPS | Concept of Operations | PRR | Production Readiness Review |
| CSB | Configuration Steering Board | RFP | Request for Proposal |
| FCA | Functional Configuration Audit | SDS | System Design Specification |
| FRP DR | Full-Rate Production Decision Review | SFR | System Functional Review |
| IBR | Integrated Baseline Review | SRR | System Requirements Review |
| ICD | Initial Capabilities Document | SVR | System Verification Review |
| ILA | Independent Logistics Assessment | TD | Technology Development |
| ISR | In-Service Review | TRR | Test Readiness Review |
| ITR | Initial Technical Review | | |
- *See Technical Reviews in the DAG at <https://dag.dau.mil/>

Two Pass and Six Gate

Leveraged for Services Acquisition?

Two Pass and Six Gate is a complex critical path structure used for weapons systems and IT programs

- Very integrated with many moving parts & pieces
- High levels of approvals

Conclusion

Two Pass and Six Gate is not a recommended application to be leveraged for services acquisitions

Large Services Acquisitions Competencies, Training and Experience

THRESHOLD	REQUIRED COMPETENCY TOPICS	REQUIRED COMPETENCIES	EXPERIENCE/TRAINING REQUIREMENTS
<p>Dollar Threshold >\$1B</p> <p>Unique contract requirements that necessitate a professional license, higher education or specialized training.</p> <p>Such requirements might include, for example, environmental remediation; major weapons systems; medical/dental/ veterinarian services, etc.</p>	<p>General:</p> <ul style="list-style-type: none"> • Planning and Evaluating • Problem Solving • Ethics • Teambuilding IPT <p>Technical:</p> <ul style="list-style-type: none"> • Conduct market research • Define Government services requirements and contractor surveillance methods • Request for proposal preparation • Source selection planning • Source selection execution • Effective contracted services performance management 	<ol style="list-style-type: none"> 1. Assist in acquisition planning. 2. Manage a Departmental/Agency requirements development effort aimed at identifying, assessing and prioritizing needed mission oriented Agency services 3. Oversee preparation and management of an integrated services delivery schedule. 4. Establish and oversee the management of a contractor's risk management process. 5. Plan the contracted services acquisition management process. Coordinate complete preparation of a comprehensive and performance work statement (PWS), Statement of Objectives (SOO), or Statement of Work (SOW) and CDRLs that fully and correctly defines the program, addressing roles and missions of the government and contractor. 6. Perform COR duties when delegated by the contracting officer. 7. Ensure ethical behavior and thereby prevent instances of fraud/waste/abuse. 8. Review technical submittals/ensure compliance with Statement of Work/Statement of Objectives (e.g., perform technical monitoring and reporting in accordance with a Quality Assurance Surveillance Plan) 	<p>Experience:</p> <ul style="list-style-type: none"> • Agency experience: minimum of 12 months • Relevant technical experience: As determined by the senior stakeholder supervisor for the Agency or requirement • General competencies: As determined by the nominating supervisor <p>Training: CLC 222 Contracting Officer's Representative Online Training</p> <p>Just-in-Time (JIT) Intact Team Training: WS 001 Service Acquisition Workshop (SAW) multi-phase engagement format TTM 002 Risk Management Workshop TTC 005 Source Selection TTM (tbd) Service Acquisition Senior Leader Overview</p> <p>Refresher Training/Optional Training: CLC 007 Contract Source Selection CLC 013 Services Acquisition CLC 014 Market Research CLC 106 Contracting Officer's Representative with a Mission Focus (for refresher in the event of lapsed initial CLC 222 training) CLM 014 IPT Management and Leadership CLM 017 Risk Management</p> <p>Minimum of 16 hours training: Every 3 yrs or: Prior to assuming responsibilities if the individual has not served as a COR within the previous 24 months. Minimum of 1 hour acquisition ethics annually Any additional training mandated by the Activity.</p>