GSA Schedules and the Utilization of Small Business
This course is sponsored by the
GSA Federal Acquisition Service
in association with the Federal Acquisition Institute
By the end of this course, you should be able to:

- Describe the purpose and benefits of the Multiple Awards Schedule (MAS) program
- Define socioeconomics in the context of Government acquisition
- Identify the various small business types and how socioeconomic objectives work within the Government
- Recognize FAR and the Small Business Act requirements as they apply to the Multiple Award Schedules (MAS) Program
- Utilize set-asides for both small businesses and subsets of small businesses, based on market research
- Identify contracting and competition requirements for the MAS Program, including getting agency credit for awards to small businesses
Topic 1: Introduction to the MAS Program

What is MAS all about?
What is a Multiple Award Schedule?

- Governmentwide contract vehicle for **commercial** products, services, and solutions

- Also known as “Federal Supply Schedule (FSS),” “GSA Schedules” or “MAS”

- Standing solicitations posted on FedBizOpps

- Awarded using FAR Part 12 procedures
MAS Contract Characteristics

- Multiple Award IDIQ (5 year award, three 5 year options)
- Fixed Price EPA
- Fair and reasonable pricing
  - Price reductions may be applied at the order level
- Performance requirements established at the order level
### The Federal Acquisition Regulation (FAR)

<table>
<thead>
<tr>
<th>FAR</th>
<th>Provides</th>
<th>Applicability</th>
</tr>
</thead>
<tbody>
<tr>
<td>Subpart 8.4</td>
<td>Ordering procedures for GSA Schedules</td>
<td>Federal Government Ordering Activities</td>
</tr>
<tr>
<td>Part 12</td>
<td>Acquisition of Commercial Items</td>
<td>GSA awards Schedule contracts under Part 12</td>
</tr>
<tr>
<td>Subpart 6.102(d)(3)</td>
<td>Defines orders placed against Schedules as a competitive procedure</td>
<td>All</td>
</tr>
</tbody>
</table>
### FAR Parts Not Applicable to Schedules Orders

<table>
<thead>
<tr>
<th>FAR</th>
<th>Title</th>
<th>Applicable</th>
</tr>
</thead>
<tbody>
<tr>
<td>Part 13</td>
<td>Simplified Acquisition Procedures</td>
<td>NO (except allows for MAS BPAs)</td>
</tr>
<tr>
<td>Part 14</td>
<td>Sealed Bidding</td>
<td>NO</td>
</tr>
<tr>
<td>Part 15</td>
<td>Contracting by Negotiation</td>
<td>NO</td>
</tr>
<tr>
<td>Part 19</td>
<td>Small Business Programs</td>
<td>NO (except Bundling)</td>
</tr>
<tr>
<td>Part 36</td>
<td>Construction and A&amp;E</td>
<td>NO</td>
</tr>
</tbody>
</table>
### FAR Parts Applicable to Schedules Orders

<table>
<thead>
<tr>
<th>FAR</th>
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</tr>
</thead>
<tbody>
<tr>
<td>Part 7</td>
<td>Acquisition Planning</td>
<td>YES</td>
</tr>
<tr>
<td>Part 10</td>
<td>Market Research</td>
<td>YES</td>
</tr>
<tr>
<td>Subpart 17.5</td>
<td>Interagency Acquisitions</td>
<td>YES</td>
</tr>
<tr>
<td>Subpart 33.1</td>
<td>Protests</td>
<td>YES</td>
</tr>
<tr>
<td>Subpart 37.6</td>
<td>Performance Based Acquisition</td>
<td>YES</td>
</tr>
<tr>
<td>Part 39</td>
<td>Acquisition of Information Technology</td>
<td>YES</td>
</tr>
</tbody>
</table>
Topic 2: Benefits of the MAS Program

What can MAS do for your organization?
FAR Subpart 8.4 Simplifies the Acquisition Process

Schedule Orders are:
✓ Faster
✓ Easier
✓ More Economical

In contrast to FAR Part 15, Schedule orders do not require:
Ø Formal evaluation (SSEB not required)
Ø Cost analysis (commercial pricing at the Schedule level)
Ø Extensive documentation (less formal process)
Ø Debrief (may provide feedback)
Ø Competitive range determination
Schedule users shall not:

- Seek further competition outside of the MAS program
- Synopsesize the requirement

FAR 8.404(a)
Ordering Procedures – FAR 8.405-1

When ordering **supplies** or **fixed-price services w/out SOW**

**Exceeds SAT**
- Develop RFQ
- Receive ≥ 3 quotes - use of eBuy meets fair notice
- Limited Sources Justification if applicable
- Seek price reduction
- May not place orders orally
- Best value determination

**Micro – SAT**
- Survey ≥ 3 contractors
- Limited Sources Justification if applicable
- Determine if a price reduction should be sought
- Best value determination

**Below Micro**
- Place order with contractor
- Distribute orders among contractors
When ordering **services requiring an SOW**

**Exceeds SAT**
- Prepare SOW and establish evaluation criteria
- Receive ≥ 3 quotes – use of eBuy meets fair notice
- Limited Sources Justification if applicable
- Seek price reduction
- Best value determination
- Overall price reasonableness determination (consider mix of labor and level of effort)
- May not place orders orally

**Micro – SAT**
- Create SOW and evaluation criteria
- Issue RFQ to ≥ 3 contractors
- Limited Sources Justification if applicable
- Distribute orders among contractors
- Best value determination

**Below Micro**
- Place order with contractor
- Distribute orders among contractors
Topic 3: Types of Schedules and Characteristics

What can I buy?
Did you know...

- GSA offers over 20 million supplies and services
- 39 open and standing solicitations published on FedBizOpps (including 9 managed by VA)
- Over 19,000 Schedule contracts
  - 80% are small businesses
  - Orders and BPAs may be set aside for small businesses
- $50 Billion total annual spend (including VA)
What Services are Available on Schedule?

- Environmental Services
- Professional Engineering Services
- Logistics Services
- Language Services
- Management and Consulting Services (including Training)
- Temporary Administrative and Professional Services
- Information Technology Services
- Advertising and Marketing Services
- Financial and Business Solutions
- Security Solutions
- Facilities Maintenance
- Disaster Relief

*Note: For a comprehensive list of services please visit GSA eLibrary.*
What Supplies are Available on Schedule?

- Office Supplies and Equipment
- Tools and Hardware
- Building and Industrial Materials
- Furniture
- Scientific Equipment
- Information Technology Products
- Vehicles and support equipment
- Appliances and Food Services
- Law enforcement, Fire, and Security Products

Note: For a comprehensive list of supplies please visit GSA eLibrary.
Topic 4: Overview of Socioeconomics

How does MAS support small business?
MAS Supports Small Business Utilization

- MAS Program promotes small business through socioeconomic preference or set-asides

- FAR Part 19, *Small Business Programs*
  - Applies to Schedule contracts
  - Does not apply to orders

- Exception to FAR 19 applicability at the order level:
  - Bundling (FAR19.202-1(e)(1)(iii))
  - Size standard criteria
MAS Supports Small Business Utilization

Non Set-Aside orders

- Consider at least one small business prior to placing an order (8.405-5(c))

- Give preference to small business if you have at least two (2) quotes at the same delivered price from small business (8.405-5(d))

- Encourage use of Contractor Team Arrangements (CTAs)

- No limitation on subcontracting

- Ordering activity receives socioeconomic credit (8.405-5(b))
MAS Supports Small Business Utilization

- Non Set-Aside orders (cont)
  - Consider socioeconomic status as a primary evaluation factor (8.405-5(c))
  - May choose small business subcontracting as an evaluation factor

- If available, ordering activities should consider at least one:
  - Small business
  - Veteran-owned small business
  - Service disabled veteran-owned small business
  - HUBZone small business
  - Women-owned small business
  - Small disadvantaged business
FAR Part 19: Small Business Programs

- Part 19 generally does not apply to schedules orders – (See 8.404(a))
  - FAR 8.405-5 provides policy for Schedules set-asides

- 19.502-4 Multiple-award contracts and small business set-asides.
  - Contracting officers may, at their discretion—
    - (c) Set aside orders placed under multiple-award contracts for any of the small business concerns identified in FAR 19.000(a)(3)...
      - “For Federal Supply Schedules Program orders see FAR 8.405-5.”

- 19.508(c) requires clauses for total and partial set-asides as well as limitations on subcontracting be added to orders under MAS.
FAR Subpart 8.405-5 – Small Business

- **8.405-5(a)** – Preference programs of Part 19 are not mandatory

- **8.405-5(a)(1)** – Set-asides are **discretionary** for orders and BPAs for small business concerns identified in 19.000(a)(3)

- **8.405-5(a)(2)** – Follow the ordering procedures at 8.405-1, 8.405-2, and 8.405-3 as applicable
  - The specific small business program eligibility requirements identified in Part 19 apply
8.405-5(b) – Orders placed against schedule contracts may be credited toward the ordering activity’s small business goals.

- For purposes of reporting, an ordering agency may only take credit if the awardee meets a size standard that corresponds to the work performed.
- Ordering activities should rely on the small business size representations made at the Schedule contract level.

- Agencies do not need to make a separate size determination at the order level, however…
  - GAO has upheld agencies’ right to request a recertification at the order level (CMS Information Services Inc., B-290541, Aug. 7, 2002)
Certification Requirements for MAS Contracts

- MAS contracts size standard certification is generally valid for 5 years

- Firms must recertify at the time of an option exercise
  - Exceptions:
    - Novation (within 30 days after effective)
    - Merger or Acquisition (within 30 days after effective)

- See FAR 19.301-2
What is Considered a Small Business?

- SBA establishes small business size standards

- Industries are classified using the North American Industry Classification System (NAICS)
  - There are separate NAICS codes for various products and services

- For GSA Schedules – NAICS codes are applied at the Schedule contract level
  - May not use NAICS codes at the order level that have not been awarded on the Schedule contract (See 13 CFR 121.404(g)(3)(iv))
Special Subcategories of Small Business

- Veteran-owned small businesses (VOSB)
  - One or more veterans own at least 51% and they manage and control daily business operations

- Service-disabled, veteran-owned small businesses (SDVOSB)
  - Veteran-owned small business with disability incurred or aggravated in line of duty in the active military, naval, or air service

- Women-owned small businesses (WOSB)
  - One or more women own at least 51% and they manage and control daily business operations

- Economically disadvantaged women-owned small business (EDWOSB)
  - One or more women own at least 51% and they manage and control daily business operations,
  - and are economically disadvantaged in accordance with 13 CFR Part 127
Multiple Award Schedules Training

Special Subcategories of Small Business (Cont)

- HubZone small businesses
  - HUBZone is a historically underutilized business zone within qualified census tracts, qualified nonmetropolitan counties, qualified base closure areas, or redesignated areas, or lands within the external boundaries of an Indian reservation.
  - The phrase “HUBZone small business” appears on SBA’s List of Qualified HUBZone Small Businesses.

- Small, disadvantaged businesses and 8(a)s
  - One or more socially and economically disadvantaged individuals own at least a 51% interest and control management and daily business.
  - African Americans, Hispanics, Native Americans, Asian-Pacific and Subcontinent Asian Americans, and women are presumed to be socially and economically disadvantaged.
Nonmanufacturer (NMR) Rule

What is the Nonmanufacturer Rule?

- On a supply contract, a firm must perform at least 50% of the cost of manufacturing the supplies (not including the cost of materials).

- The NMR provides that...
  - a firm that is not a manufacturer may qualify as a small business on a supply contract that has been set aside for small business if it supplies the product of a domestic small business manufacturer.

For additional information:

http://www.sba.gov/content/non-manufacturer-waivers
Nonmanufacturer Rule Reminders

- As the contracting officer applying the Nonmanufacturer Rule to your acquisition strategy, there are some things to remember:
  - The NMR does not apply to service contracts.
  - The NAICS code and size standard will flow down from the Schedule contract.

- SBA may grant waivers to the NMR in industries where there are no small business manufacturers.
  - Nonmanufacturer waivers are not granted for HUBZone procurements.
  - Nonmanufacturer waivers cannot be granted after quotes on a solicitation have been received.
Language applying the NMR to set-aside Schedule orders can be found in the following clauses:

<table>
<thead>
<tr>
<th>Clause</th>
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</tr>
</thead>
<tbody>
<tr>
<td>52.219-3</td>
<td>Notice of HUBZone Set-Aside or Sole Source Award (Nov-2011)</td>
</tr>
<tr>
<td>52.219-6</td>
<td>Notice of Total Small Business Set-Aside (Nov-2011)</td>
</tr>
<tr>
<td>52.219-27</td>
<td>Notice of Service-Disabled Veteran-Owned Small Business Set-Aside (Nov-2011)</td>
</tr>
<tr>
<td>52.219-29</td>
<td>Notice of Set-Aside for Economically Disadvantaged Women-Owned Small Business (EDWOSB) Concerns (Nov-2011)</td>
</tr>
<tr>
<td>52.219-30</td>
<td>Notice of Set-Aside for Women-owned Small Business Concerns Eligible Under the Women-Owned Small Business Program (Nov-2011)</td>
</tr>
</tbody>
</table>
### Required Clauses

These clauses are being added to the Schedule contracts. However, this should be verified through Contracts Online. If the Schedule contract has not been modified to add the clauses, the ordering activity contracting officer should incorporate the applicable clause(s) into the RFQ.

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<td>Notice of Total Small Business Set-Aside (Nov-2011)</td>
</tr>
<tr>
<td>52.219-13</td>
<td>Notice of Set-Aside of Orders (Nov-2011)</td>
</tr>
<tr>
<td>52.219-14</td>
<td>Limitations on Subcontracting (Nov-2011)</td>
</tr>
<tr>
<td>52.219-27</td>
<td>Notice of Service-Disabled Veteran-Owned Small Business Set-Aside (Nov-2011)</td>
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Process for Effective Accomplishment


1. Conduct market research
2. Identify small business using SBA/Advantage or issue RFP through eBuy to determine capabilities
3. Set-aside?
   - Yes
     - MP
     - SAT
   - No
     - Use “set-aside” language in RFQ

4. Is a small business capable of doing the work?
   - Yes
     - MP
   - No
     - SAT

5. Survey three small businesses for three set-asides per solicitation or issue RFQ to three small businesses

6. Designate socioeconomic status as a primary evaluation factor
7. Designate socioeconomic status as a primary evaluation factor AND encourage contractor teaming arrangement
8. Post RFQ to eBuy

9. Evaluate based on factors listed in RFQ
10. Award to small business
11. Award to teaming arrangement among small business
12. Award to “other than small business”

Acquisition Planning
Acquisition Strategy
Source Selection
Award/Past Award

Multiple Award Schedules Training

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The Contracting Officer should include the following language in the RFQ:

*This is a notice that this [insert either “order” or “Blanket Purchase Agreement”] is a total set aside for [insert either “small business concerns” or specify a type of small business concern]. Only quotes submitted by [insert either “small business concerns” or specify a type of small business concern] will be accepted by the Government. Any quote that is submitted by a contractor that is not [insert either “a small business concern” or specify a type of small business concern] will not be considered for award.*

Note: If using eBuy and selecting “set aside” this language will be included in the RFQ automatically.
Set-Aside Schedules and Special Item Numbers (SINs)

For more information, see
http://interact.gsa.gov/blog/utilizing-set-aside-special-item-numbers-sins-small-business
Topic 5: GSA’s Role and MAS

Implementing Section 1331 of Small Business Jobs Act (SBJA)
In general, agencies achieve greater small business utilization under MAS.

Data Source: FPDS
Training provided to customer agencies: over 8,382 members of the acquisition workforce, over 30,095 CLPs

Courseware in either Instructor-Led, Webinar, or CLM formats

Other training outlets:
- YouTube
- Interact
- FAQ/Portal
Upgrades to eBuy (MAS RFQ system) effective April 2012

- Customers can now identify their RFQs as set-aside
- Functionality provides valuable data on the use of Section 1331
- Only acquisition system in government – until recently - that captures this data
Set-Aside RFQs in eBuy

Percentage of Set-Aside RFQs in eBuy

<table>
<thead>
<tr>
<th>Month</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>April-12</td>
<td>13.22%</td>
</tr>
<tr>
<td>May-12</td>
<td>15.68%</td>
</tr>
<tr>
<td>June-12</td>
<td>18.14%</td>
</tr>
<tr>
<td>July-12</td>
<td>21.26%</td>
</tr>
<tr>
<td>August-12</td>
<td>24.41%</td>
</tr>
<tr>
<td>September-12</td>
<td>17.07%</td>
</tr>
<tr>
<td>October-12</td>
<td>16.36%</td>
</tr>
<tr>
<td>November-12</td>
<td>16.93%</td>
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<tr>
<td>December-12</td>
<td>19.50%</td>
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<tr>
<td>January-13</td>
<td>19.99%</td>
</tr>
<tr>
<td>February-13</td>
<td>20.67%</td>
</tr>
</tbody>
</table>
Number of Set-Aside RFQs in eBuy from April 1, 2012 - February 28, 2013

- Army, 2482
- Air Force, 2336
- Navy, 1971
- Interior, 480
- Army, 2482
- VA, 2479
- DOT, 55
- State, 84
- Labor, 170
- HUD, 11
- Justice, 337
- DHS, 520
- HHS, 493
- Energy, 100
- Education, 28
- Other, 261
- Commerce, 197
- ORM, 71
- SBA, 54
- NSF, NRC, 14
- EEOC, 3
- EPA, 85
- Treasury, 174
- NASA, 54
- GSA, 224
- AID, 10
Set-Aside Utilization

eBuy Set-Aside Utilization To-Date

Set-Aside by Program

Number of eBuy Set-Aside RFQs by Socioeconomic Program

- 8(a): 212
- HUBZone: 1
- SDVOSB: 202
- Small Business: 915
- EDWOSB: 113
- WOSB: 12,719

Multiple Award Schedules Training
Large vs. Small Business Obligations in Percentages Under Schedules for FY11

All but 2 Agencies achieved at least 23% to SB under MAS
Six of the agencies (including all DoD services) failed to reach the 23% goal
Topic 6: Identifying Small Businesses

How can you identify small businesses within the Schedules program?
Market Research

- Market research is the key to achieving small business objectives.

- Use market research to ensure at least three small businesses can meet need in order to meet ordering procedure requirements.

- FAR Part 7 and Subpart 8.4 require acquisition planning and market research prior to placing orders against Schedules.

- The two most commonly used approaches to market research are:
  - Identify small businesses through eLibrary.
  - Issue an RFI through eBuy to determine market capabilities.

- The outcome of market research determines the acquisition strategy, both in terms of how to acquire goods and services and in how they are described to enable maximum competition.
Market Research

- Market research is the key to achieving small business objectives
- Use market research to ensure at least three small businesses can meet need in order to meet ordering procedure requirements
- FAR Part 7 and Subpart 8.4 require acquisition planning and market research prior to placing orders against Schedules
- The two most commonly used approaches to market research are:
  - Identify small businesses through eLibrary
  - Issue an RFI through eBuy to determine market capabilities
- The outcome of market research determines the acquisition strategy, both in terms of how to acquire goods and services and in how they are described to enable maximum competition
GSA Advantage! can help find supplies (products) through the price comparison option. By using the column entitled “Socio” the ordering activity can view the socioeconomic status of each contract.
GSA eLibrary can assist with locating Schedule contractors and their socioeconomic status by using the Socioeconomic column.
### Step 1. Assign Category & Select Vendors

**Instructions:** Listed below are vendors who currently have contracts under the category you selected. Place a "check" next to the vendors whom you would like to quote on your RFQ. The vendors you select will receive an e-mail notice inviting them to quote on your requirements. You may request a quote from any or all vendors listed. In order to satisfy FAR requirements, you should request quotes from at least three (3) vendors (if available). Remember, vendors are not required to submit a quote.

Reminder: Other vendors listed under this category may view and quote on the RFQ even if they have not been selected to receive an email invitation. In the event of a set-aside, ALL eligible vendors must be notified.

<table>
<thead>
<tr>
<th>#</th>
<th>Category</th>
<th>Description</th>
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<tbody>
<tr>
<td>35</td>
<td>THE OFFICE, IMAGING AND DOCUMENT SOLUTION</td>
<td></td>
</tr>
</tbody>
</table>

**51 56** Repair of Government-Owned Equipment (all equipment covered under this schedule) for equipment not under Maintenance Service Agreement

10 contractors are available.

- **Select all vendors**
- **Is this a small business set-aside?**
  - If small business set-aside, select small business program
  - If this is a small business set-aside, you must select the small business program from the drop-down

<table>
<thead>
<tr>
<th>Vendor</th>
<th>City, State</th>
<th>Socio-economic</th>
</tr>
</thead>
<tbody>
<tr>
<td>ABC LASERJET INC.</td>
<td>NORCROSS, GA</td>
<td>Small Business SBA Certified Small Disadvantaged Business</td>
</tr>
<tr>
<td>BIDWELL INDUSTRIAL GROUP, INC.</td>
<td>MIDDLETOWN, CT</td>
<td>Small Business Women Owned business</td>
</tr>
<tr>
<td>CANNON IV, INC.</td>
<td>INDIANAPOLIS, IN</td>
<td>Small Business</td>
</tr>
<tr>
<td>CARTRIDGE TECHNOLOGIES, INC.</td>
<td>ROCKVILLE, MD</td>
<td>Small Business SBA Certified Small Disadvantaged Business</td>
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**10 contractors are available.**

- Select all vendors
- Is this a small business set-aside?
  - If small business set-aside, select small business program
  - If small business set-aside, select small business program

<table>
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<tr>
<th>Small Business Options</th>
<th>City, State</th>
<th>Socio-economic</th>
<th>Text File</th>
<th>Webpage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Service Disabled Veteran Owned Small Business</td>
<td>NORCROSS, GA</td>
<td>Small Business</td>
<td><img src="image1" alt="Icon" /></td>
<td><img src="image2" alt="Icon" /></td>
</tr>
<tr>
<td>Women Owned (WOSB)</td>
<td></td>
<td>SBA Certified Small Disadvantaged Business Women Owned business</td>
<td><img src="image3" alt="Icon" /></td>
<td><img src="image4" alt="Icon" /></td>
</tr>
<tr>
<td>SBA Certified Small Disadvantaged Business Women Owned business</td>
<td>MIDDLETOWN, CT</td>
<td>Small Business</td>
<td><img src="image5" alt="Icon" /></td>
<td><img src="image6" alt="Icon" /></td>
</tr>
<tr>
<td>Small Business</td>
<td>INDIANAPOLIS, IN</td>
<td>Small Business</td>
<td><img src="image7" alt="Icon" /></td>
<td><img src="image8" alt="Icon" /></td>
</tr>
<tr>
<td>Small Business</td>
<td>ROCKVILLE, MD</td>
<td>SBA Certified Small Disadvantaged Business Women Owned business</td>
<td><img src="image9" alt="Icon" /></td>
<td><img src="image10" alt="Icon" /></td>
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36 THE OFFICE, IMAGING AND DOCUMENT SOLUTION

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9 contractors are available.

You have indicated this is a Small Business set-aside. The following vendors will be notified. Click here to change/remove the set-aside business indicator that you have selected.

<table>
<thead>
<tr>
<th>Vendor</th>
<th>City, State</th>
<th>Socio-economic</th>
<th>Text File</th>
<th>Web page</th>
</tr>
</thead>
<tbody>
<tr>
<td>ABC LASERJET INC.</td>
<td>NORCROSS, GA</td>
<td>Small Business, SSA Certified Small Disadvantaged Business, Woman Owned Business</td>
<td>[Link]</td>
<td>[Link]</td>
</tr>
<tr>
<td>RIDWELL INDUSTRIAL GROUP, INC.</td>
<td>MIDDLETOWN, CT</td>
<td>Small Business</td>
<td>[Link]</td>
<td>[Link]</td>
</tr>
<tr>
<td>CANNON IV, INC.</td>
<td>INDIANAPOLIS, IN</td>
<td>Small Business</td>
<td>[Link]</td>
<td>[Link]</td>
</tr>
<tr>
<td>CARTRIDGE TECHNOLOGIES, INC.</td>
<td>ROCKVILLE, MD</td>
<td>Small Business, SSA Certified Small Disadvantaged Business, Woman Owned Business, Woman Owned (WOSB)</td>
<td>[Link]</td>
<td>[Link]</td>
</tr>
<tr>
<td>GUNTHER INTERNATIONAL LTD</td>
<td>NORWICH, CT</td>
<td>Small Business</td>
<td>[Link]</td>
<td>[Link]</td>
</tr>
<tr>
<td>JTF BUSINESS SYSTEMS INC</td>
<td>ALEXANDRIA, VA</td>
<td>Small Business</td>
<td>[Link]</td>
<td>[Link]</td>
</tr>
</tbody>
</table>
## Re-cap

<table>
<thead>
<tr>
<th>Set-Aside</th>
<th>Non-Set-Aside</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ordering activity may conduct discretionary set-asides</td>
<td>Ordering activity should give preference to small business if at least two</td>
</tr>
<tr>
<td>FAR Part 19 does not apply – See 8.405-5 (ordering procedures come from 8.405-1, 8.405-2, or 8.405-3)</td>
<td>May use socioeconomic status as an evaluation factor</td>
</tr>
<tr>
<td>Limitations on subcontracting apply</td>
<td>No limitations on subcontracting</td>
</tr>
<tr>
<td>NMR applies</td>
<td>NMR does not apply</td>
</tr>
<tr>
<td>Ordering activity receives socioeconomic credit</td>
<td>Ordering activity receives socioeconomic credit</td>
</tr>
<tr>
<td>No “rule of two” – Must ensure competition requirements in 8.405-1, 8.405-2, or 8.405-3 are met</td>
<td></td>
</tr>
</tbody>
</table>
Knowledge Checks

Can you set-aside orders and BPAs under Schedule contracts?

May an agency set aside Schedule orders and/or BPAs for any of the socioeconomic programs (e.g., small disadvantaged, service-disabled veteran-owned, women-owned, and HUBZone small business concerns)?

Are there any circumstances in which COs are required to use set-asides?

If an agency can only find two small businesses, can it still do a set-aside?
Knowledge Checks

What steps must an agency take to set aside an order under the Schedules Program?

What is meant by the “program eligibility requirements”?

Can socio-economic status still be used as an evaluation factor as opposed to set-asides?
You should now be able to:

- Describe the purpose and benefits of the Multiple Awards Schedule (MAS) program
- Define socioeconomics in the context of Government acquisition
- Identify the various small business types and how socioeconomic objectives work within the Government
- Recognize FAR and the Small Business Act requirements as they apply to the Multiple Award Schedules (MAS) Program
- Utilize set-asides for both small businesses and subsets of small businesses, based on market research
- Identify contracting and competition requirements for the MAS Program, including getting agency credit for awards to small businesses
Key Web Resources

- FAQ concerning Set-Asides on Schedules
  - www.gsa.gov/portal/content/113371
  - www.gsa.gov/schedulesandsbgoals

- MAS Training Student Guides
  - www.gsa.gov/mastrainingstudentguides

- MAS Desk Reference
  - www.gsa.gov/masdeskreference
Additional Web Resources

- Multiple Award Schedules  www.gsa.gov/schedules
- eLibrary  www.gsaelibrary.gsa.gov
- GSA Advantage!  www.gsaadvantage.gov
- eBuy  www.ebuy.gsa.gov
- MAS News  www.gsa.gov/masnews
- Federal Acquisition Regulation (FAR)  www.acquisition.gov/far
- NAICS Codes are at http://www.census.gov/eos/www/naics/
Webinars and Online Training

- Monthly Webinars sponsored by the MAS Program Office  
  http://www.gsa.gov/masnews

- Training Videos -  
  http://www.gsa.gov/portal/content/210517

- Continuous Learning Modules
  - Federal Acquisition Institute
  - Defense Acquisition University  
    http://icatalog.dau.mil/ Search for continuous learning modules with FAC prefix
Federal Strategic Sourcing

- Interagency acquisition vehicles support strategic sourcing principles and goals both agency-wide and government-wide

- Strategic Sourcing in a fundamental component of Interagency Acquisitions

“Our government is the largest purchaser in the world, but it buys as if it were 130 mid-sized businesses. We’ve got to leverage our buying power.”

Source: Joe Jordan OFPP Administrator April 2013 Interview, ASI Advisory, Realizing the Vision of Buying Smarter
Federal Strategic Sourcing

“It is really what those two words say: it is being thoughtful in the way you acquire the goods and services your agency needs. To me that is what strategic sourcing is.

It is putting spend under management in a holistic way, in which we are sharing and utilizing information and data to maximize value in the outcomes.”

Source: Joe Jordan OFPP Administrator April 2013 Interview, ASI Advisory, Realizing the Vision of Buying Smarter
Federal Strategic Sourcing

- Strategic Sourcing ultimately is about implementing a more strategic approach to meeting the governments acquisition needs. It is about buying smarter.

- Buying Smarter (more than just price)
  - Leveraging spend (economies of scale)
  - Improving and standardizing terms and conditions
  - Standardizing and streamlining acquisition practices
  - Improving efficiency and reducing administrative costs for both government and industry

Source: ASI April 2013 Advisory “Strategic Sourcing Realizing the Vision of Buying Smarter”
Federal Strategic Sourcing

Why Place so much Emphasis on Strategic Sourcing?

- Tightening budgets
- Opportune time to maximize value for every dollar spent
- Improve efficiency of our collective acquisition processes and approaches
FSSI (lead by GSA) was established in 2005 to address:

- Governmentwide opportunities to strategically source commonly purchased products and services
- Eliminate duplication of effort
## Federal Strategic Sourcing Initiative

<table>
<thead>
<tr>
<th>FSSI Solution</th>
<th>Key Features of Strategy</th>
</tr>
</thead>
</table>
| Domestic Delivery      | ▪ Reduces visible shipment rates and “hidden” surcharges  
 ▪ Lowest price to government  
 ▪ Business intelligence reports and analysis increase agency visibility into Total Cost of Ownership |
| Office Supplies        | ▪ Drove competitive pricing for the core items and reverse auction techniques  
 ▪ Incorporated POS terms to reduce price variability and increase ease-of-use  
 ▪ Solution balanced cost savings with socioeconomic and green considerations |
| Wireless TEMS          | ▪ Allows agencies to identify “optimal” rate plans based on analysis of usage  
 ▪ Reduces inventory costs and billing errors |
**Federal Strategic Sourcing Initiative**

<table>
<thead>
<tr>
<th>FSSI Solution</th>
<th>Key Features of Strategy</th>
</tr>
</thead>
</table>
| Print Management       | - Lowers costs and increases environmental performance by utilizing the most efficient equipment and making “green” print options the default  
                        |   - Optimizes equipment deployment and usage through sophisticated Managed Print Services and focuses on lowering total cost of operation.                                                                                   |
| Wireless Plans & Devices | - Aggregation of volume to drive volume discounts and eliminate price variability  
                           |   - Solution will be implemented with joint governance from CIOC                                                                                                                                                       |
| SmartBUY               | - Leverages the government’s buying power to reduce the cost of commercial off-the-shelf (COTS) software and services  
                        |   - Current savings of 195M is based on limited software under SmartBUY management. Since joining FSSI new effort to focus on large spend categories with the major publishers will significantly improve the savings |
December 5, 2012 - OMB issued a memo, subject: Improving Acquisition through Strategic Sourcing

- Called on agencies to expand the use of strategic sourcing both within their agencies and governmentwide to:
  - reduce contract duplication
  - consolidate spending
  - recognize economies of scale by aggregating their returns

- Established a new Strategic Sourcing Leadership Council (SSLC) (replacing the Strategic Sourcing Working Group)

- Required Designation of Strategic Sourcing Accountable Official for the 24 agencies subject to the Chief Financial Officers Act
December 5, 2012 - OMB issued a memo, subject: 
*Improving Acquisition through Strategic Sourcing*

GSA tasked with…

- Implementing at least five new government wide strategic solutions in each of FY 2013 and 2014
- Increasing transparency for prices paid
- Best practices for acquiring, using, and disposing of the commodities managed through FSSI