Tony: Introduce Seth Custer and team, and Seth will get into the details on that from the RPO East team. He’s been supporting research contracts and purchases for the past six or seven years. Seth was recently appointed as the director of the group, and really has done a great job in developing communication with our office, and really reaching out to many of you in the field to address concerns, issues, and so forth.

And so, I thought this would be a good opportunity, one, to get to know Seth, and two, to also kind of rethink and re-walk through the process of working with RPO East, and talk a little bit about some of the challenges that they have, as well as some of the things that on our end, we can do to help them, so that procurement packages can be done quickly and efficiently. So I’m going to turn it over to Seth, and just want to thank him publicly for all the work he's done over the last few months in getting us information and so forth. Seth, take it away.

Seth Custer: Oh, nice. Great. So, Seth Custer here. Thanks for the intro, Tony. Just really appreciate your support, too, and how we’ve been able to work together as a team as I’ve come in here. Just a real quick background on who we are, and kind of how we got here. I’m currently supervising the team, and came on board mid-July. So it’s been I guess about five months that I’ve been here, and really stepped into something nice that the rest of the group had started, in cooperation with Tony and many of you. So while he shared some nice words about the things that we’ve done, I’ve kind of just stepped in and tried to keep things rolling from this point.

I do want to share I’m in the Northeast. Most of the staff here are in Pittsburgh -- Mike, Lynn, Nell, Robyn, Rachel, Shannon, and Jacqueline are all out of the Pittsburg office, where this group was originally stood up. Ann Marie came on board in April. She’s out of NCO 1 up in Rhode Island, and I am in Pennsylvania, close to the Hershey area. I work out of the Lebanon VA, working out of home close to the Lebanon VA. We have a little bit of snow and ice here today. My wife and kids are making cookies in the kitchen, so if you hear some noise in the background, that’s what’s going on here with my house.

But the folks on the screen here are arranged in seniority order. Mike, Lynn, and Ann Marie are our lead contracting officers. They all have a number of years of experience, and are senior level COs. Nell, Robin, and Rachel, and Shannon as well, are all contract specialists. Nell and Robin have contracting officer warrants, so they’re able to sign contracts. This group’s just been -- you know, they’re just a little less seasoned than Mike, Lynn, and Ann Marie. I think you probably recognize at least Mike and Lynn’s names, probably from doing some of the more complex actions that you’ve seen.

Jacqueline, while listed last on the slide here, is probably the front end, and most of the interaction that you folks deal with. Probably work with her on the point of this discussion more than maybe any of the rest of us. Jacqueline’s role here, identified as procurement technician, is really that system support person, who helps to review actions, and review and kind of discuss things that we’re going to look at here today, as well, and help just to bring everyone along in terms of creating a package, getting it framed and submitted to us so we can work it. Then really, the rest of this group of COs and contract specialists, and take it and work the action with the vendor community.

So that’s who we are, where we are, a little bit. An important note, we’re all in the Eastern time zone, so we do try to pay attention to some of you folks in the Central and West, and if we do need to make accommodations, we try to pay attention to that, especially some of you in California or Portland. I think we have a good bit of work there, as well.

Getting started here, the main point of just what I want to get into a little bit is just really fundamental basics. We’ve had a few of these discussions in the past few months, so I thought it’d be nice just to bring this together corporately. Rather than seeing the fifth or sixth or eighth or tenth group come on board, we could just do this as a group, all together. Really, the intent here is to hit high points. What goes into a package, what we are looking for, how to submit it, maybe some tricks of the trade here. Important things to know, but maybe not every last bit of detail.

A piece of our vision is to stay in communication through the new year in FY23, as we move into January, February, March, maybe looking toward that big meeting in April of 2023, to pull a nice presentation there together as well. But for today, we’re looking at just kind of how to navigate our process a little bit, where to find us, where to find information, and also, again, just some tips and tricks.

Where to find us -- we’ve got a nice R&D customer center that provides information quite specific to what we’re going to talk about today. You can see here this has been a portal that’s been available for a number of years. One of my predecessors from a few years back, Keith Constantino, worked to set this up, and we’ve kind of worked with it. Jacqueline and I are working to do what we can to continue to keep it current, and maybe make it as new and fresh as possible. This is kind of where you might want to come to check for any tips and links and helpful information, and a lot of what I’m going to refer to and speak through today is found here, or information that can be linked through this area.

As the SharePoint that I’m presenting from is shared later today, you’ll be able to see that actions like this that have a hyperlink are active. This was just built recently, so all of these should take you to current hyperlinks, and hopefully helpful solutions. This first one will take you to our SharePoint that shows a few of these buttons, that include Procurement Package Documents -- that’s a big part of what we’ll look at -- some tips on submission and instructions, and then other links and things.

The middle button says About Us. That’s going to just be information about the folks on the team again. We’re working to get a current picture uploaded there, so you can kind of see our faces and know who each of us are. The Cutoff Date button will be touched on toward the end. We’ll talk about lead times, and also procurement cutoff dates for the end of fiscal year initiative. While we’re in December, and still technically in the first quarter of the year, it’s not too early to talk about those things, and that’ll come up here later today.

This is a bit about our site, where you can find us, and helpful information. As we look through some of the objectives today, again just want to provide resources for a procurement package, and hopefully that’ll help answer a few of the expectations, things that we look for as you submit a package, and just kind of how to navigate that process. The second item is what documents we look for, and what are required in a procurement package, and understanding, again, some of the information behind that, and why those are there, and what we look for, which are required, which might be optional, dependent on the type of procurement that’s happening, and then how to submit and what to expect through the procurement process.

All right. One little picture here to segue into getting started. Really, probably many folks ask, “Where do I begin? How do I get started in this thing,” that many people might seem to think is an easy process, many also may think is very cumbersome. The important first step is just to determine the type of procurement that you’re conducting, and we have three main types here -- supplies, services, or affiliate contracts. Those are -- I’m learning more and more every day -- largely geared toward research and research support.

I should back up a minute and just give maybe a bit more background about myself. I’ve been in contracting for 20 years, 21 years -- 14 or so is here with the VA. I did come from an NCO support office in NCO 4, so a large bit of my experience is working directly with hospitals and hospital management and function. This research focus is just a little bit different, and I understand there is some intricacies here, especially related to funding. Still, the contracting process remains the same. My goal, and our team’s goal is to ultimately provide you a good contract that supports the need that you have, to keep your initiative functioning.

It all starts with clear identification of what we’re buying, and how we’re going to go about buying it. Referencing back to that customer center that I had showed on the previous slide, this link will take you there, and there are many useful tips, and again links and documents and things that can be found there. This is set up for your convenience. Please use it. Go there regularly. I mentioned that we’re going to keep it current. It’s one of the front-facing areas that I think we can have.

One section -- I do want to continue to populate an area for what we call the VABIT, VA Business Information Tool, is a big VA portal that’s got a lot of document resources. I want to build a little section here specific to research, and some of the things that we buy over and over again, that we can put good examples of statements of work or market research information in that area, sole source documents, that if you have a need similar to this for a research statistician or whatever, that we can go out, and if different sites contracted for that before, you could use that document as a starting point for your requirement as well. A lot of these things are going to be found out here on the customer center, and again, in that documents section.

The second link here that you can go visit is the VHA Customer Reference Guide. This is what I referenced that is a VHA level procurement reference center, so a lot of other general contracting information at this link. Throughout the presentation, you’ll see hyperlinks to different documents or sections, and many of those come from VHA level references. This is a customer guide. We’ll also see links to the procurement guide, which is kind of like the bible, if you will, of VHA contracting. A lot of specific guidance -- how to step through certain types of procurements, even certain types of documents. And for our interest, in your interest, how to do things like market research, and how to build, and what to base a government estimate on, and how to do things like that. So I won’t go to every hyperlink here, but just want to share that these are active, and I invite you to research those.
If you need help in getting started -- I think many times, we’re here to help. We’re here to communicate. That’s the purpose of this meeting today, is just to open the dialogue. Some or many of you I’ve met, and we’ve had individual conversations, and I think we walk away from those feeling good about the direction that we go, and feeling good that we’ve had that connection made.

Of course, I think many of you know Jacqueline and the rest of our team especially, but as we create packages, Jacqueline’s the one on the front end that’s working through Force, and pulling your information that you submit from Force into ECMS, so that I can review and assign it out to a staff member. So she’s probably there on the front end, that you should be contacting first and foremost. If she’s not available or you run into problems on certain things, then I can step in.

Also, I encourage our staff, the COs and CSs, to reach out to and just be engaged with all of you as they’re working a procurement. If you know that you’ve got an existing contract in place, that you’re either working to recompete or exercise an optional and/or do a modification to, of course, rather than Jacqueline or myself, I’d encourage you to reach out to that contract specialist first, and we’ll continue to dialogue through there.

As we get started, I mention this -- some documents are standard, and some are sometimes negotiable, or sometimes applicable, variably, dependent on the situation. I’m just going to list these here, and then we’ll go through specifics on each of these. The Procurement Checklist is required on everything. This is again a VHA level contracting requirement. Really, this guides all of the package development, and we’ll get into this in a minute. Otherwise, we look at the Statement of Work or PWS for services, and SON is a Statement of Need for procurements that are geared toward equipment or supplies, where we’re listing more salient characteristics or things like that. Basically, that’s the requirement document, whatever it is we’re buying, and the description of either that supplier or service that we’re paying for.

Also, the market research is required, independent government estimate, and the 6500 Security Checklist, related to security language. Other documents that are sometimes applicable -- an Acquisition Plan, J&A, or sole source LSJ FAR Part 8 procurements. Then COR Nomination Letters is one that sometimes is applicable. FITARA approval may be a new concept to some, and then also just a recommended site-specific information memo to file. These are all things that we’ll look at in depth as we move forward. Some standard, some conditionally applicable.

First here, those that are required. I touched on this, the Procurement Checklist. Hopefully this isn’t new. A nice picture of it here on the right. This is a sample that is the attachment three when you follow this link at the bottom. This takes you to the Procurement Checklist. On our SharePoint, in the R&D customer center, when we look at the first top left box from that previous slide on the initial page, you’ll see a big -- right near the top is a link to utilize the correct checklist here. If you see that there is a supply requirement, you will utilize this attachment three. If you’re using a service, you’ll most likely utilize attachment four, which is geared towards services. These ask many of the questions, and drive identifying which type of document go into each package.

So we’ll fill out the information up top. You as the requester will be responsible for this, and really, as this first bullet indicates, you will tell us what goes into the package. As we work through the checklist, there will be questions here that indicate either a yes or a no response to many of these documents, and it’ll, as you answer, either enclosed or not required. Of course that indicates that yes, I need to produce this document, or no, it’s not applicable, and I don’t need to. Pay attention to the type of procurement that we’re conducting, as that drives which checklist to use.

Then as the third bullet says here, please take this seriously, and really use it for what it is. Many times I know we’re under the gun, and we want to get this thing in, and get it submitted and get it off to contracting as quickly as possible. It’s important, though, that we answer this honestly, correctly, accurately, and then provide the answers, the responses, the document for that requirement. It’s a lot easier to tackle these things upfront, and make sure that everything is there and required, rather than sending it in, passing it through, and then we get to the back end, and it’s been in for like two weeks, and we say, “Oh, no. You’re missing this or that document.”

Then we’ve got to put the pause button on, and go back and email back and forth, and do all this, where, in essence, we’re usually losing maybe upwards of a month or more when we go that way. If you sit through, and take it the first time through, and look and do this with good, positive attention and diligence, many times, in buckling down and getting this done right, it comes in, it goes through, and we’re able to hit the ground running right when it’s in. So just thank you for doing that.

If you do run into challenges, have questions, I’m a believer in communication, and staying in constant communication, really, and that we’re helpful. We’re here to support and help you. And so, if you hit a spot where you say, “Yes, I do need to have this document included,” but you’re not quite sure what it looks like, or what the reason is, or where it should go, or how to compile, or if we have a template, feel free to reach out to any of us, myself especially. I’ll probably take a look at, maybe have a quick conversation to see what the requirement is, think about who it might go to, and maybe put -- either help myself, or put you in touch with whichever CO is probably likely to be working that action. Then we can work together to help come up with those documents on the front end, and then it’s still going to be complete upon submission into Force.

Once the checklist is completed, you’ll see all the documents that need to be included. There should always be, again, these five items checked, among others, possibly. Again, we’re calling this the requirements document, and at this point we’re going to look through some of the more specific actions and document types. Again, not really get into too much detail on what they are, or necessarily each element of it. Again, we’ve got kind of a vision for taking a more specific look at each of these required elements later in the year, or as we continue to work through things. But for the purpose of this presentation, we just want to share some fundamental thoughts, and maybe some tips for how to work through here.

Again, this is the requirements documents, whether that’s a Statement of Work or a PWS for service-type actions, or a Statement of Need, or sometimes we call it salient characteristics, a requirements action, for supply documents. This truly is the foundation of the requirement. We can put whatever clauses or little things in there, into a contract, but what the vendor cares about, and what they’re going to provide, whether it’s a supplier service, is all captured in this element. This is the description of what we’re buying, some background behind it, what the expectation is, the deliverables, or the things like that that are going to be required. What performance elements, or how we’re going to measure them, or the timeline, and maybe what job categories are going to be provided through a service. So it’s important that this is viewed as the foundation of the requirement, and really it’s the core of the contract.

The next bullet here, to start early. I think this is also as important as this document is. If you don’t have a template to start from, it’s important that you give this really the most due diligence, the most heart and soul of your attention and your effort, as this really is the purpose of the contract. Again, we want to make sure that everything’s clear and direct, consistent and thorough. A couple other words thrown on here are to utilize layman terms. Keep the verbiage simple and straightforward, and just use a consistent tense tone and terminology. Don’t make things too complex, or utilizing like different parts of speech or things like that.

This other tip here, on making no assumptions. You know, we often think, well, they’re the affiliate, and they’re going to know what we’re looking for in this, so maybe I don’t need to put that in. Really, if anything is to be required, it needs to be in this document, as that’s what drives all performance and deliverable for the contract. Also here, again, helpful tips that you can look at at your leisure.

Market research is next. As we develop the requirement, you should then be thinking about what, who is in the market, who can provide the service, whether that comes from your personal knowledge, or maybe some professional interaction, maybe some web research or other engagements. Of course, affiliate agreements and those staffing requirements that we have that are pretty unique, are pretty self-explanatory and straightforward.

Some others -- if you’re buying a piece of equipment, it might be more like shopping for a Christmas present, where you’re doing a lot of internet research, or trying to find, again -- I reference salient characteristics. Certain things, that maybe it needs to fit a certain size or dimension, or have a certain rate of speed and processing or storage capacity, different things to make this work. So as those important elements are required, it’s much like buying a car, or anything you might buy here at Christmastime. Like you’re looking for a certain item that performs a certain way, and you want to make sure that those things are available.

Good to know what you know of the market, and document that. Where you came up with it, how you came up with it, why you’re looking at those items or service vendors, maybe what stands out about one or another. The more information that you can provide here, the better. The multiple stars here on the fourth element is if we can ever provide SAM registration -- this is a critical tip here, that we’ve learned through the past few months. Any sources that you find that can meet your need, it would be great if you could include SAM registration for those into the package. We have experienced some of these, where we weren’t able to award at the end of the fiscal year because SAM registration had lapsed, or that it’s been taking extra long to process. So the sooner we can get that in, and ensure that those vendors are registered, the better. It just makes our process run a lot easier, the procurement will flow quicker, and we’ll actually be able to award when we get to that stage. New contracts do need to be with a vendor that’s registered in SAM, so it’s important that we cover that upfront, and if we’re able to, it just, again, enhances our process.

Once you submit market research, we’ll continue that effort once the package is assigned to one of our staff. We’ll do some things like a Sources Sought Notice, which is a federal contracting portal we blast out through to registered vendors, and we basically provide a description and say, “Hey, this is the requirement. Can anybody out there do it?” Oftentimes we get responses there. It’s one way to drum up interest. Sometimes we look at past procurements, do our own web or database searches. Some of these things include GSA contracts or other federal contracts, and small business searches or things like that. Different databases we have, that we can review.

One of them that is required is the SDVOSB, Service-Disabled Veteran Owned Small Business Portal. It’s called the PIV, or the CV, and the definition of that acronym slips me of course at this time, but it’s a portal of all SDVOSB registered vendors, that we can similarly research NAICS codes or types of actions, and see which SDVOSBs are available in that category. So through every requirement, we need to search these databases as well, all in an effort to drum up competition, and see how many sources we can find for a given procurement.

Once we have some of that information, hopefully you’re able to generate a good government estimate. This just drives a lot of thresholds and things, so we know what we’re getting into as a contracting group, in terms of moving forward through the procurement process. Many of our reviews and review thresholds are driven through the government estimate. One of our core functions is also determining a price to be fair and reasonable, so as we arrive toward an award decision and award the contract, we need to make sure that the value of that contract is fair and reasonable. Sometimes when we compete, that can be a determination, or a method of utilizing and determining a price fair and reasonable.

If we’re in a sole source situation, we oftentimes lean on the government estimate to make that determination. So it’s important that this is a good value that you arrive at, that it’s not solely dependent on the one quote or something that you may find from a suggested vendor in the market research, but through a variety of sources, to come up with that on your own as a submitter, to drive arriving at a good government estimate. Again, links for resources and help as you move through that.

The final required package document is the 6500 Security Checklist. This could be a little bit of a discussion. Technically, the Procurement Guide states that it is required for joint review by these parties -- the contracting officer, privacy officer, information security officer, and the COR POC or program manager. When security information is applicable, my approach is -- and actually, in the Procurement Guide it states that if it’s not applicable, it must at least be signed by the COR or the POC. In the past, there was some debate that if it’s not applicable, do we need to provide a 6500 Checklist? I’ll tell you that if there’s not one there, I’m going to come back and ask for it, or we’ll have to verify that the verbiage is not applicable, so it’s best just to provide it, and one that says not applicable if it's not applicable.

If it is applicable, then we need to run through these parties, and determine if and what level of access to the VA systems or sensitive information is going to happen through the contract. The reason for this is that it drives, of course, our contractor’s network access, what level of background investigation, and things like that, and any applicable verbiage that must be applied from the 6500 Checklist, in order to protect data and data rights in the event of a security breach or something, that we’re protected in that regard. A link here to the 6500 Checklist and the guide, and some of those things that hopefully you’re familiar with.

Those are the required documents. Stepping into some others that may be needed on occasion -- an Acquisition Plan. This is a joint effort document, this is one that can be quite lengthy. It’s got I think like 29 elements that need to be addressed, and this talks about what we’re buying, who’s in the market, a lot of the stuff we already talked about. Anticipated pricing, any security concerns. Are there procurement risks or tradeoffs or data access, and all these things. So it really takes a lot of what we had covered before, and maybe even an evaluation methodology and all this stuff, and formally documents it in an Acquisition Plan, a formal Acquisition Plan.

A fairly recent shift, that this is now only required over seven million dollars. There was an interim -- what was it called? An Informal Acquisition Plan for actions between one million and seven million dollars. That’s been done away with, so that was nice. It was just kind of a two-page little checklist that we worked through, to kind of in a light way capture some of those things. This really turns into a pretty good-sized document, that we talk in fair length. Each element a good paragraph or two or three, on basically the approach that we’re going to take through an acquisition. This is, again, a jointly prepared document. What we ask is that you would maybe start it, and then we’d kind of come in and help polish it, and kind of work through it together, as the COR POC requester with the contracting officer.

Yeah. It captures program objectives, and again, our strategy through the procurement. This would be signed by multiple parties -- you guys, us, and ultimately, I think a level above the contracting officer at this point. Once we go over fifty million, it needs to get higher level review and approval. One side note, IPT, Integrated Product Team, is required at seven million dollars and above. One change there to note is that that requires an additional project charter that has other formal documentation, basically an agreement on how we’ll proceed through a procurement. So you may see an IPT as well, that’s related to acquisition planning.

Important note here at the bottom -- engage early on this. Ask questions. We’ll work through this, and try to chart the course for acquisition planning, maybe even well before you submit your package. Again, as mentioned before, we’re here to help. We want to engage and talk early on these things, even actions that could be a year or more off, trying to get started down that path.

Another optional document, or sometimes depending document, is the Justification Approvals. J&A, we call them. An LSJ is the FAR Part 8 form of a sole source document. A little distinction there -- J&A is for open market documents and agreements. When we go in to, again, emphasize federal supply schedule agreements, ordering mostly out of FAR Part 8, then the document’s called an LSJ Limited Source Justification. A few of the selections or justifications are a little different, though some are always the same. One unique source is probably the most common. When we get into research, some of those can be authorized by statute, we call them, so many of those research actions fall on the J&A open market side.

I do need to say here we sole source an awful lot in this community, far, far more than our counterparts. Whenever possible, part of our initial screening when I see a J&A in there, I’m going to be asking some questions about, you know, really how valid is that, is it really required. The thought behind a sole source is, this truly is the only viable source, the only one that possibly can provide it. Sometimes I see justifications like, “We conducted our trial, and this one was better than that one and cost less, and so this is the one.” All of that kind of discussion tells me, hey, there’s more sources out there, and we can compete it. Not saying that we won’t arrive at the one that you want, but it’s telling me that we can compete it, and we should give all of those possible sources an opportunity to participate.

So if we see that situation, we’re probably not going to go down the sole source path, and we’ll do some things to compete the action. Good justifications are things like maybe proprietary equipment, or a solution that’s unique to one vendor. Of course, the affiliate agreement relationships and research are of course also pretty solid. Things like that are things that we’ll be looking to justify there.

Note here at the link, this will take you to the VHA Procurement Guide. In this section, there are different templates for the J&As and the LSJs under FAR Part 8, and also different documents at different thresholds. Pay attention to some of those that are -- if you’re less than twenty-five thousand, or less than two hundred and fifty thousand, you may see certain versions. Make sure that you’re using the right version for the document, for the requirement at hand. And this should be for the total procurement value, so if it’s a service that has five years, it should be based on that full five-year value. It’s very important that we’re on the right document.

The next optional document is a COR Nomination Letter. Again, recent guidance has changed. When we identify a COR contracting officer’s representative, I think in the past, that was kind of a standard expectation, that all or many, especially service contracts, would have a COR identified and delegated. The recent change was a lot of actions, it used to say that they are required for some things like patient transportation, architect and engineering contracts, construction contracts, complex services, and some others.

What it now states is that these are recommended, and as they relate to our mission, and the general mission of the VA, they are now recommended. It’s really related to the level of complexity of the requirement. So if we’re just buying, you know, a supply, or if we have a service to maintain fume hoods, or something that’s, you know, just a guy coming in every quarter, and he’s doing some tweaks to the exhaust system or whatever, really not too complex. If it is a -- some of our research requirements, where we’ve got a person or multiple people working side by side with our staff, and they’re complex environments, those of course might be better suited for a contracting officer’s representative.

To get that in place, the program side, your side, would need to submit a nomination letter. That comes in and is reviewed by the contracting officer, and then we in turn issue a delegation. The nomination should come with a training certificate, and I believe that requires a supervisor on your side, supervisor’s signature, that they’re saying yes, this person was trained here. They’re familiar with the requirement, and we’ll make sure that they’re doing their duties as a COR, and then we’ll delegate the COR as part of the performance once the contract’s awarded.

I’ll try to stay fairly light on this topic, FITARA approval. This is related to IT and IT related requirements. I’m just going to say this -- research this section, please. Product service codes, the third bullet here, there is a four-digit code that drives all procurements, or each action it’s identified with. Many that start with D and some numbers are services that are related to IT and telecom. When we see seven and a letter -- I think it’s 7A, 7B, 7C, 7D, and then two numbers behind it, those are supply items that are IT and telecom related. These actions require a FITARA approval. In the old days, FITARA was called ITARS, and these are required because -- if we look down here at what’s required. Really, these are required to ensure that if it’s a person gaining network access, or for buying supplies that require IT access, that it’s approved by the OIT community to gain that access that’s required. Otherwise they’ll shut the equipment down, and it won’t function. It won’t be able to pull the data down that it needs to. It won’t be able to store that data or see it. The person won’t be given the access to the data, so it’s very important that this is done up front.

It's also important to note that it’s driven by the COR or POC side, and processed through there. About halfway through the process is where it asks for a contracting officer’s signature, and then it goes back and continues through the process the rest of the way. So really, we’re very kind of hands-off, removed from this process, but it’s mostly to the interest of the requester, your side, and is initiated and driven by the same side, to ensure, again, that the service or supply can gain the access desired.

Last one, and quickly. I see I’m kind of moving a little slower than I had hoped, but hopefully this is good information. Last document that I’d recommend is just if there’s anything specific that you care to share or include in the file, specific notes to whoever on our staff might be getting this -- you know, things like just a summary, or if you have certain evaluation factors that you want to keep in mind, or delivery dates that are required, these types of things, who you want to be on the distribution -- feel free to just make a memo to the file. Throw that in the Force submission, and we’ll pay attention to that.

A fun little thing here to kick off, I think, three slides of Force tips. I’ll scan through these pretty quickly. I hate to read slides, but these might go best if we just read this, so that you can see them and maybe dissect them later on. But these are things that we gathered. Mostly Jacqueline put these together through her interaction with you, as we’ve brought documents in. Things that we’ve seen that maybe you could tuck away to keep in mind as you submit your requirements through Force. Just make sure that you select the correct site when coming our way. If you don’t want to go through the local network, and then it’s kind of lost in the ECMS for a bit, and we’ve got to spend some time pulling that across.

Two fields to pay attention to -- the instant action amount is really the current value, and then contrasting that, the total amount would be the total contract value, so pay attention to those two dollar values when you submit. Again, as before, this is driving some of our thresholds and dollar values for the requirement. The government estimate should include pricing estimates for the total contract value, so when you’re creating that government estimate, that should match that second dollar value.

Very important here to submit your Force action. When you see that status change to planning, that’s the time to submit your 2237. What this does is, when you see that flip to planning, that means that Jacqueline’s pulled it from Force into ECMS, and it’s in our hands. Then when you submit the 2237, they match up, and then the 2237 comes to our office, again, rather than floating out to the NCO.

Please pay attention to the request type. These that are noted here, it’s important that we do that. We can change this when it comes in, but this is just helpful in determining how we assign our work, and knowing what type of request is coming in. When you do have a modification task order option, please include the contract number that we’re modifying or exercising an option against or issuing a task order against. That just helps us get that action to the contract owner faster. When we have our Indeed templates, we ask that you use those things, the things coming out of our office, rather than from the local NCO.

When you’re entering a title or description, please just be clear to make this a descriptor of what we’re buying, or what the requirement is, rather than saying the university, or maybe the doctor that’s being supported. Make it clear what the research project is, and we’ll use some of those other things as we can or need to later. But it’s important to have a valid description, like a more -- not generic, but specific to the action being performed, rather than, again, a vendor name, or the doctor who’s requiring it.

Need dates are important. I know sometimes we get behind the eight ball, and it’s tough to overcome some crunches. We do the best we can with what we can, but it’s important that those are valid dates, so that it’s not just -- you know, we can take it seriously when you submit a program need date. Every action that you submit, I look at, and especially the new requirements, I look at those. So as they come in, I take into account that date, the desired start date, our workload, and arrive at an estimated date of award for our staff to accomplish an action. It’s important that your need date is accurate, so that I can hopefully arrive at a due date or an estimated award date that can make us all happy.

I ask that you not put a contracting officer’s name for new submissions, new requirements. We’ve got eight people, and sometimes things may need to change hands. It won’t always go to who did it before. Opposite of that, when you’re doing a modification, please do click the person there, again, with that contract number that hopefully you’ve been in contact with. Please don’t sign the J&A where the contracting officer is supposed to sign. We see that sometimes on document submissions.

When we’re submitting a modification, if we’re increasing or decreasing funds from a prior year or current year where a PO in VISTA is obligated, if the funds are in the fund control point, we don’t need a new 2237, and honestly, more 2237s makes things more confusing, harder to track, harder to reconcile, and just kind of more cumbersome to chase down. If we need to maybe start with a conversation with the contracting officer, and we can kind of help guide what to submit and what to answer, what to include in those submissions, especially for mods. We’ll probably have a specific training just on modifications at some point.

Returning versus cancelling an action. If a 2237 is to be updated and sent back to us, we’ll use the return function there. So we’ll return it to you, you can update, and then resubmit it. If we’re going to cancel it and it’s not to be used again, that’s the cancel function. We’re going to cancel and kill it. Last one, if an action is in to us, and it is in the planning status, and if you need to add or update a document, here’s a tip on how to do that. You can click this, the icon to add the document, upload it to AMS -- AMS is the ECMS system -- and then please just look to see that you processed through to get this check mark you could see there towards the right of the screenshot.

Then you can also check the status over here on the right, when you look at the details tab. All the way on the bottom, if you see the VA thing there, or a person’s name, you know it’s been assigned, and there’s also the planning status in the middle on the right there. When it’s in that planning status, we need to follow these directions here, to click that icon to add the document or upload it, specifically. If you run into challenges with this, please contact Jacqueline.

One last thought here, and then hopefully we have some time for Q&As if we need to. I just want to touch on and share lead times. These are like a starting point and standard, and obviously drive toward the procurement cutoff dates for the end of the year. Most actions take us 60 to 90 days. Those are standard requirements that are even less than two hundred fifty thousand. Usually something that’s twenty-six thousand dollars might and probably does oftentimes take us just as long as something that’s two hundred thousand dollars or so, so many things are going to take in this threshold.

When I review actions, I’m giving them at least 60 days, maybe upwards of 90, for actions that are less than two hundred fifty thousand dollars. Once we cross that threshold, we’re going to tack a month on at each of these different levels, and some might take four, five, six months or more, depending on the complexity, again. All this to say, early in the year, we need to be planning and even now submitting actions, and probably nearly almost all should be submitted in the next few weeks or month, month to two months here, so that we’re ready to go to the end of the year. I know last year we had a huge bottleneck in June and July, and now is the time to be preparing submissions, even though we see some of these things that show dates April, May, June. The more time, the sooner we can get things in, obviously the better that helps us in our execution plan.

Last slide that I have prepared -- you should be seeing an assignment message for new actions that come in. Hopefully you’re getting those. If you’re not, please let Jacqueline and I know. When I review -- this is new requirements. When they come in, we populate a database, and then that sends an automated email. It might look like it comes from Jacqueline, I think. Those are from the new requirements. I’m actually populating that, reviewing, setting that estimated date of award, picking who it’s getting assigned to, and moving out on that.

Status updates. We’re working on a way to share this best with the field. We have an internal process where we can provide status comments, where the procurement is in its life cycle. That’s for me to review, and our staff to keep track of each action as it moves through the procurement process. Working with Tony on how to best share that with you. I think he sends it out periodically. We’re exploring options on ways we can maybe put that on our customer center, to update that regularly and have it at your fingertips whenever you need it.

As I’ve said a few times here, continue to communicate with us. We’re available, we’re interested in talking. I believe that the more we dialogue, the better things go, and once you get that action assigned, you should know who you’re working with. Stay in touch with them. We should be communicating with you. If you have questions, reach out to that person, or always feel free to come to myself.

Parker, might need some help if we open up for questions. I don’t know that I can see the --

Parker: Yes. We’re --

Seth Custer: -- typing stuff, so --

Parker: We’re going to bring them up now, and I think we’ve got a few. \_\_\_\_\_ [00:55:48] through as many as we can. We can go a couple minutes over, and then if there’s any unanswered ones, we can pass them off to you as well after the fact.

Unidentified Male: Parker, can we go through -- let’s maybe ten more minutes for question and answers, and then stop after that. Would that be okay?

Parker: I think so. Brandon, are you all right as well on time?

Brandon: I’m good to go.

Parker: Great. Yeah. Yeah, so we’ll go to 3:10 here.

Seth Custer: Is there a -- okay.

Unidentified Male: Yeah. Seth, we’ll normally read out the question, and then you answer it.

Seth Custer: Okay, so the question is, “Is RPO East accommodating of provisions of FAR 62302-3A2II, to establish or maintain an essential engineering research or development capability, to be provided by an educational or other nonprofit institution, or a federally funded research and development center, the valid exception on the sole source and market research submission? The regional NCO office here is hesitant/inconsistent in their willingness to use on unique research equipment requirements.”

My answer to this, and maybe some of my staff, if you have more specific interest in this, or experience -- I would hesitate to say anything that’s coded, that’s funded through ORD, would be called research. I’d look more specifically at what’s being done in the procurement, and if the point of the effort is specifically research and research driven, I would lean on this justification, or if especially we’re in the affiliate agreement arena, lean on that statute to partner with an affiliate for research items. So not to say it depends, but I think it depends.

An example I gave earlier -- we saw a requirement for maintenance of exhaust hoods. This was a few months ago, I think, or fume hoods. Even though that fume hood may sit in a research office or a research space, and it may be funded by research dollars, I don’t know that I’d call that requirement research. So something like that, I wouldn’t lean on this justification for going sole source in that case. That’s kind of the line I draw there. If we’re performing research, I’d consider looking at this.

“I’m seeing more requests to purchase tablets” -- I think -- “for data collection at point of contact with study participants. Are requests for purchasing tablets something we can submit through RPO East, or should we rely on our local acquisition teams?” I stepped into a situation here where I think there were varying degrees of training, and familiarity with research, and the package requirements here. Our staff is pretty well taxed at this point, and our mission is intended to be research-specific, and kind of on the more complex end. We’re working to expand our resources internally, staffing specifically, with the hope of taking everything that’s funded ORD 161, 0161. Until we get to that point, I think if you can go to the NCO for something simple like this that’s just purchasing tablets, I really think that that might be your best and quickest avenue. Tony, any other thoughts or comments on that topic?

Tony: Yeah. I think that the question about the tablets for data collection, one is you’ve got to follow the IT guidelines, and is it IT or not, and that’s the first thing. But then I think the other part of it is true, that we really need to look out for the amount of acquisition packages going to RPO East. In terms of the current staffing, I will tell you that the numbers are shocking, from the perspective of the number of actions that each of the contracting officers have at RPO East, in relation to what the national standards are. And so, we’re hoping to remedy that, and work with VHA finance to address some of the concerns and go from there, but we’re very supportive of trying to increase the staffing levels at RPO East now.

Seth Custer: Another question. “How do we get access from our logistics partners and myself to RPO East in force? Checked to see if RPO East was an option, and it was not listed.” I believe your local network ECMS coordinator should be able to help. You might need to ask somebody in contracting who that is. They tend to be on the contracting side of the house. If you run into issues, please let me know. Our coordinator, Julie Stahl, is great with that access, and she’s here in the East, but knows her counterparts throughout the country. So I would start with your NCO ECMS coordinator, and hopefully they can help.

“Vendors often ask for assistance with SAM registration and/or to update registration. Is there a POC we can refer them to?” On the SAM site, there is a SAM helpdesk. That of course is the best place to go. They should be able to help walk through. It should be free. I’d advise them -- I think, jeez, two, three, four years ago, I had heard of some maybe not authentic sources that were charging like five hundred dollars to help get vendors registered. There should be a free resource to get vendors into SAM, so please, if you’re sharing information with them, tell them to go to the helpdesk that’s on the site. I think phone numbers and chat available, or email availability. They should be able to help get them through. Really, we’re not an expert in there, and it’s all of the information is vendor information that they should have to provide, or be able to provide, and that helpdesk can help get them there.

“Can I contact your office for assistance with CPARS?” Yes. I didn’t mention CPARs. Part of delegating a COR and considering that, and the thresholds we would look at COR delegation, part of the roles and responsibilities with that is completing CPARs. So if you have questions or concerns specifically about how to rate someone, or the types of things you’d want to include in that, you can reach out to our office, of course. Yes. The way that process works, in a quick matter of seconds here, you would provide the information on your end. We kind of look and validate it. Then it goes off to the vendor for their input.

If there’s any dispute or disagreement in that, it comes back to the next level above. So usually that first review on the contracting side is by the contracting officer, and then if there’s this dispute or disagreement between what we, the VA, enters, and what the contractor sees, or the vendor sees as their performance, a lot of times they might say, “No, I wasn’t -- I was better than what you said,” or, “I didn’t do that,” or whatever. Then it comes to someone like myself, to kind of be the arbiter of that determination. So if you need assistance, sure, you can come our way. If you need anything technically, we can find the right resources as well.

“Can RPO East be used for service contracts for things like external IRB or affiliate animal husbandry services?” We’ve done some of these contracts in some of the animal husbandry services. I think our initial interest is to continue to work renewals of the efforts that we have. I know there are some of these requirements that exist in the field currently. Given what we said earlier, I think we want to maintain that posture until things change, maybe in two or so. My official answer here right now would be let’s keep it where it is. If it’s with us, we’ll take it. If it’s with your local NCO, I think you should try to continue to work it there.

“What is the primary difference between modification of existing contract and order against existing contract?” All right. Different types of contracts exist. One that -- there’s two primary types that have orders against them. You could have BPAs, which are a type of an agreement, or what we call IDIQs, or Indefinite Delivery/Indefinite Quantity. There’s another type of indefinite delivery contract, IDR, Indefinite Requirements Contract. They function similarly, IDRs and IDIQs, and BPAs. Basically, those types of contracts set the terms. They show the ordering methodology, the dollar values, and things that we’d order.

The thing is with these, we don’t necessarily know when we’ll have a need for the requirement, or how often maybe, or how much we might need. So we basically set the overarching contract -- and this is kind of like -- I forget who I was meeting with, but I kind of talked like, this is like you’re going into a fast-food restaurant, and they’ve got their prices set up on the board. Right? I can drive by McDonald’s 50 times but not need anything, if I’m not hungry. The time that I am, I might go in there, and I might need chicken nuggets that day, so I’ll order the chicken nuggets. That’s my order against that contract. Or I might want a Big Mac, and I’ll order against and pick that line item, to order against the contract. So an IDIQ/IDR or BPA might function like that restaurant with their order that’s published, with set pricing that we can go in and order against any time that we have a need.

Differently, a modification against an existing contract is any of our contracts -- a purchase order, a definitive contract, where these usually have a C in the middle of it -- 3624E22C, and four more numbers. These are defined, and the pricing structure is usually we’re paying monthly or a one-time fee, or quarterly on this for this service, or whatever. If we need to change the terms of that contract, or change the dollar value of it, then you would submit a modification to that contract. Usually, changing terms, decreasing dollars, or increasing funds, or otherwise changing the terms that are associated with the contract would be what we call a modification to an existing contract.

Tony: Seth, I think we’re going to cut it there. We definitely have more questions, so we’re going to make sure those get to you, and we can figure out how we would like to get any answers out that you might want to give.

Seth Custer: Yeah, sure. Sounds good. Hopefully this was helpful. I enjoyed it. Not too bad. Hopefully it was valuable, helpful information. Again, hopefully this is just the kickoff of dialogue, so if anyone has specific questions or other things, follow up with -- again, feel free to reach out to us. We’re planning to have more and more specific information to come.

Tony: Fantastic. Thank you, Seth, for the presentation, and thank you folks for joining us. This, the recording and the slides will be up in the webinar archive, and possibly some follow-up to that unanswered Q&A. So please look for that, and we appreciate any feedback on the post-webinar survey. With that, thank you all, and have a good afternoon.