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Lessons Learned –January-March 2001

Independent Review Lessons Learned:

OSD has asked that the services collect Lessons Learned in five categories:

- Performance Work Statement (PWS) Development Phase
- Management Plan Development Phase
- Solicitation and Source Selection Phase
- Cost Comparison and Administrative Appeal Phase
- Implementation and Transition Phase
- Other

Performance Work Statement (PWS) Development Phase

Union Participation

Union participation is occasionally a problem. Union representatives are usually asked to attend each meeting, but often lose interest and fail to attend. This can result in no record of fulfilling the legal requirement to “Consult DoD Employees” (10USC2467). Sharp CA Teams document the invitation to attend the meetings concerning the development of the PWS.

Addressing the entire Solicitation Package

Reflecting the Full Solicitation Package. CA teams often do not address the entire solicitation in the Management Plan. Instead of only addressing the PWS (Section C of the solicitation), the CA teams should develop the management plans with the entire solicitation (Sections A-M) in mind. Often, Section L of the RFP, Instructions to Offerors, provides guidance and instruction of how staffing in the TPP should be demonstrated, or on plans to be submitted by all offerors.

Historical Workload

Workload reflected in the PWS needs to be identifiable/traceable in the study documents, MEO/TPP. Business Process Reengineering and Business Process Improvement reductions must be clearly reflected and savings clearly stated from historical data represented in the PWS.

CA teams should understand the rationale and significance of historical data and its application to A-76 studies. While historical levels of work and time required need not be used as the sole basis for study calculations, deviations from historical levels should be clearly explained, and an audit trail maintained. For example, each of the following would be acceptable reasons for deviating from historical data:

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- One tenant activity is placing their own contract for facilities maintenance service, and will not be a customer of the BOS contract or MEO. All service tickets and IJOs for that customer have been deleted from the study workload.
- The installation is building a new 50,000 square foot admin facility, which will be completed in FY 2002. To reflect this increase in requirements, we have adjusted the historical data upwards using the following projection ...
- Average time per service ticket in the electrical shop has been reduced by 8.0 percent, due to the following business process improvements ...

These are a few examples of an almost infinite number of valid reasons why projected workload or time required could deviate from historic experience. The key, in each instance, is that a verifiable reason for deviation from historical data is provided, with quantified backup documentation. The adjustments to historical data should be replicable by the IR team.

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Management Plan Development Phase

WinCompare software mandatory

The new WinCOMPARE2 software is mandatory for Navy Activities for cost comparisons where a complete set of documents listed in Section B of the "Guide to Reviewing Cost Estimates Prepared Under the Commercial Activity Program" have not been submitted to the Independent Review Contractor on or before 15 April 2001. Any cost comparison not in this format after 15 April will require written approval of OPNAV N465 via 3SO to complete IR.

A-76 Independent Review Calendar

The A-76 Independent Review Calendar is available on the 3SO web site. Go to the front page, then Program Status to find the Independent Review Calendar. The calendar currently shows the dates of the site visit for planning purposes.

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Management Plan Development Phase

MEO Supporting Documentation

Supporting Documentation. Questions are raised regarding why supporting documentation is required, when it is required and to what extent it is required. The IRO is required to determine if the MEO described in the Management Plan can accomplish the work required by the PWS. Supporting documentation is required to make this determination.

- a. PWS Workload. The original organization required a certain number of personnel to accomplish a certain workload (this should be in supporting documentation). Ideally, this documentation should go back over 3 years to provide a through analysis of the function(s). If this much information is not available, an analysis of available information should be completed (and recorded as supporting documentation) to allow a reasonable decision on the work required in the solicitation. The workload in the PWS should be the same as the historic workload (actual or derived) or the PWS team should be able to demonstrate (through supporting documentation) how the new workload was determined.
- b. Management Plan Staffing. The MEO team must demonstrate (through supporting documentation) how historical efficiency is related to the efficiency assumed in the Management plan (such as efficiency measures the MEO will employ to increase efficiency). These calculations should be based upon the same workload used in the solicitation.
- c. Cost Estimate. All non-labor costs in the IHCE must have supporting documentation. This includes MEO subcontracts, travel and materials.

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Solicitation and Source Selection Phase

Independent Government Estimate

Independent Government Estimate (IGE) . The IRO is not required to review the IGE. Since the IRO has no need-to-know, the IGE, a procurement-sensitive document, should not be shared with the IRO or IR support contractor.

Implementation and Transition Phase

Post MEO Review, Required Documentation

Post MEO reviews continue to fuel the discussion about how the MEO should document the quality and quantity of their work. The Quality Control Plan and the Quality Assurance Surveillance Plan will be used whomever wins the cost competition. If there is no quality control documentation during the first year of MEO performance, there is no way to show that MEO provided the quality of work required by the PWS.