

Lessons Learned – October-December 2003

Independent Review Lessons Learned:

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

- Functionality Assessment
- 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

Meaning of the Word “Solicitation”

The practical inexperience of PWS/Management Plan Teams can prevent the ability to utilize lessons learned and create the improper use of certain terms. A recent example of this occurred with the improper use of the term “solicitation”. PWS teams often equate the term “solicitation” to the Performance Work Statement (PWS) in everyday term usage. However, the PWS is only Section C of the solicitation. Solicitations normally include Sections A through M, listed below for your information and reference.

- a. Section A- Solicitation Contract Form, usually Standard Form 33, the front page titled, “Solicitation, Offer and Award”
- b. Section B- Supplies of Services and Prices, This is the bid sheet.
- c. Section C-Performance Work Statement with the following sub-sections
 1. Section C-1, General Requirements
 2. Section C-2, Definitions, Abbreviation, and Acronyms
 3. Section C-3, Government Furnished Property and Services
 4. Section C-4, Service Provider Furnished Equipment, Material, and Services
 5. Section C-5, General
 6. Section C-6, Directives, Publications and Forms
- d. Packaging and Marking, often not used
- e. Section E Inspection and Acceptance
- f. Section F Deliveries or Performance
- g. Section G Contract Administration Data
- h. Section H Special Contract Requirements
- i. Section I Contract Clauses
- j. Section J List of Documents, Exhibits and Other Attachments, This section is often not in alphabetical sequence, but is placed after Section C.
- k. Section K Representations, Certifications and Other Statements of Offerors
 - l. Section L Instructions, Conditions and Notices to Bidders
- Section M Evaluation Factors for Award

Proper usage the term solicitation will enhance communication and reduce confusion. Also, there are several websites listed below to assist in reducing this confusion:

<http://esol.navfac.navy.mil/> for NAVFAC,

<http://www.eps.gov/> for Fed Biz Ops

<http://www.neco.navy.mil/> used by NAVSUP and others

<http://www.navair.navy.mil/> for NAVAIR

http://www.sd.fisc.navy.mil/vendor_set.html for FISC San Diego

<http://procurement.msc.navy.mil/Contract/Welcome.jsp> for Military Sealift Command

Management Plan Development Phase

Communication between the MEO Team and the Contracting Officer

Management Plan (MEO) Teams continue to have difficulty understanding and complying with the requirement to maintain proper separation (or firewall) between the MEO Team and the PWS Team. The MEO Team is considered a bidder and must direct questions to the Contracting Officer in the same manner as other bidders. These questions should be submitted in writing, to allow the Contracting Officer should respond with answers by amendment so that all bidders have access to the same information.

Some MEO teams have encountered communication difficulties when the Contracting Officer is not co-located and, therefore, can only be reached via email or voice mail. These communication obstacles create frustration within the MEO team, because the question could be quickly answered by the near-by PWS team, but for the firewall . Written communication must be established early with the Contracting Officer, utilizing the same privileges that all bidders have to ask questions.

Developing the IHCE with the COMPARE model

Below is a list of simple mistakes in preparing the IHCE using COMPARE that should be checked and corrected:

1. Failure to use the CAMIS study number. Instead, a dummy number is used. The correct CAMIS number is required.
2. Failure to list the names and titles of the persons signing Lines 19 and 20. The COMPARE model has an input screen for this information.
3. The Severance Pay Cost Worksheet has an input block called "Number of Assigned Civilians in the Current Organization". Often, this number is incorrect. Lesson - there is no benefit to the MEO by trying to add or subtract from this number.
4. Position titles in the Line 1 Personnel Cost records should be the same as those on the Position Descriptions (PD). If the box is too small for the entire title, abbreviate to the required 18 character limit. Lesson - Create a cross-reference sheet so that the abbreviation can be easily linked to the correct PD.

5. Failure to cost cell phones, pagers and copiers that are not government furnished but are part of the efficient working of the MEO.

Solicitation and Source Selection Phase

Claimant Independent Review Officer

Claimants that provide motivated, trained Independent Review Officers for their Under 40 Independent Reviews reap the benefits of quick decisions and IRO signatures.

Implementation and Transition Phase

Executing the Transition Plan

The OMB Circular requires that the MEO be implemented in accordance with the Transition Plan. Problems have occurred when there is a protest or appeal not forecasted in the Transition Plan. This creates incorrect implementation dates in the transition plan and, therefore, different costs. Activity Commanders must document that the transition plan was changed to a different date and specify the reasons.

PWS Reading

Conducting open meetings to review PWS when tasked to implement an MEO allows for problem-solving and enhanced communication. The following are some suggested questions to ask during the meetings:

1. What does this portion of the PWS mean to you?
2. How are we doing this work now?
3. Are we doing work that is not required in the PWS?
4. Are our customers asking us to do work that we used to do, but is no longer in the PWS? What do we do about that?
5. How can we solve the problem that we are discussing?
6. Is this new? Is this work that is not in the PWS? Do we need to modify our PWS through the Activity Commander?
7. Do we have the right skills and equipment to do this work?