



## **Schedule 03FAC | Facilities Maintenance and Management**

When you need complete facilities maintenance or management solutions the following is handled under the 03FAC Schedule.

Federal customers can obtain facilities maintenance services under Schedule 03FAC. These services cover complete operations, maintenance, repair and alterations of military and government facilities. Customers may choose one or any combination of the services offered.



## **These services include, but are not limited**

Refrigeration/Heating, Cooling, and Air Conditioning (HVAC), Plumbing/Pipe fitting; Elevator Inspection and Maintenance; Electrical Systems/Energy Management Control Systems (EMCS); Energy Management and Audit Services; Fire Alarm and Fire Suppression Systems Maintenance; Smart Buildings; Landscaping/Snow Removal; Painting; Pest Control; Janitorial; Marine Vessel Maintenance and Repair Services; and Cemetery Maintenance.



## **The GSA Schedule Advantage**

Over 2000 Agencies can buy direct from you

Less competition in the procurement process

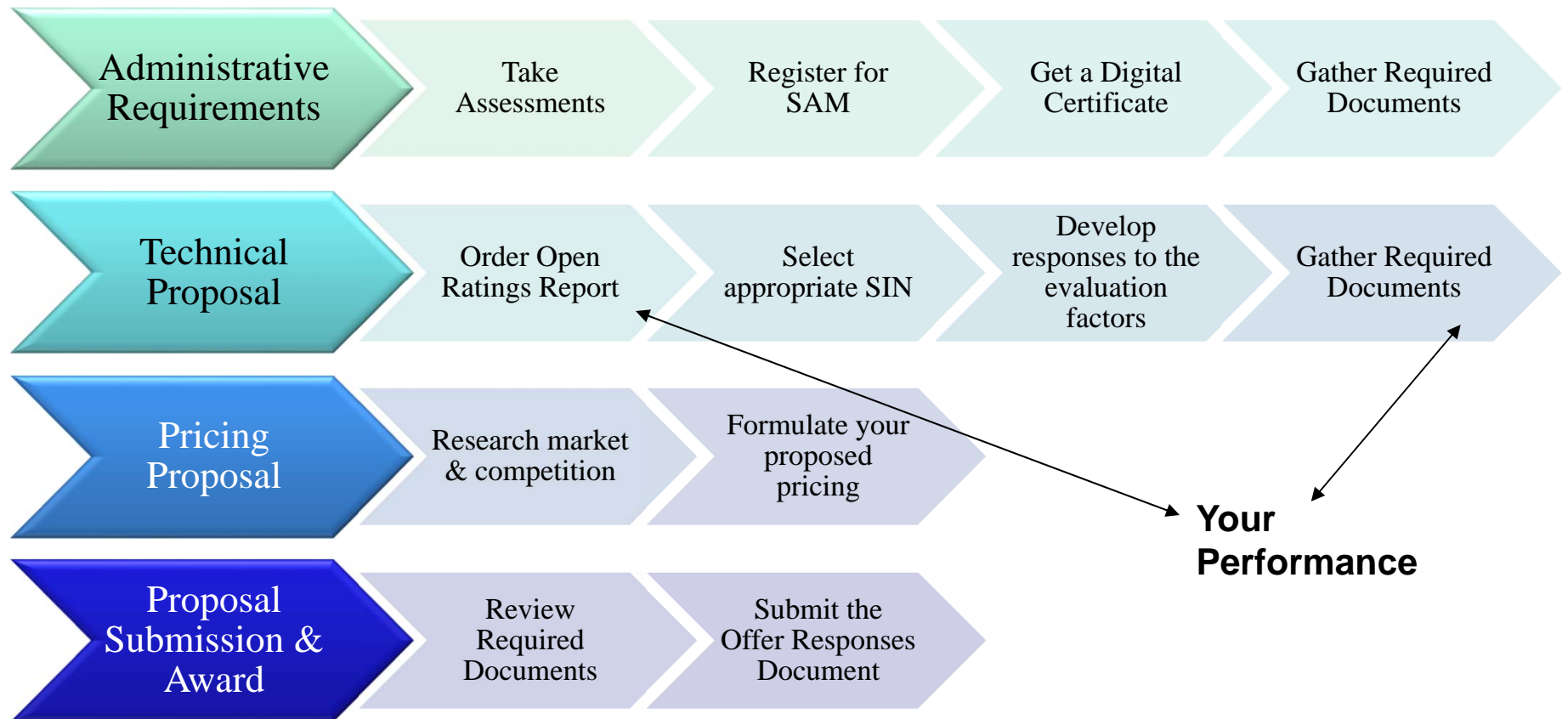
State and Local Governments can purchase off the Federal Schedule before, during, and after in declared Emergency areas, Cities, and or entire US States.

# What we work with to create a GSA Schedule

- **Administrative/Contract Data:**
  - Readiness Assessment
  - Pathways to Success Certificate
  - Financial Statements (Last)
  - Offer Responses Document
  - Production Point
  - Commercial Agreements
  - Performance PWS/SOW Documents
- **Technical Proposal:**
  - Evaluation Factor Documents
- **Pricing Proposal:**
  - Commercial Pricelist/Market Rate Sheet
  - Proposed Pricing Document
  - Commercial Sales Practices Format (CSP-1)
  - Economic Price Adjustment (EPA) Mechanism
  - Labor Category Matrix as needed
  - Professional Compensation Plan



# My Steps to Organizing Your Approach





# Administrative Requirements



Administrative Requirement

Technical Proposal

Pricing Proposal

Proposal Submission & Award



## **Required Assessments from GSA You Can Expect to complete during the Proposal Process**

### **Pathways to Success Certificate:**

- Must be completed by at least CEO or Designated Rep

### **Readiness Assessment:**

- Detailed questionnaire to gauge overall understanding of MAS program

# Important Registrations Are Up To Date





# YOUR DIGITAL SIGNATURE- BEFORE SUBMISSION

- Digital Certificate
  - Online digital identity
  - Access to eOffer
  - Costs approximately \$120
  - Must be updated every two (2) years
- Available from:
  - IdenTrust Inc – [www.indenttrust.com](http://www.indenttrust.com)
  - Operational Research Consultants (ORC) Inc – [www.orc.com](http://www.orc.com)



# Financial Statements... During Proposal Process

- Required Documentation:
  - Balance Sheets (for past two fiscal years)
  - Income Statements (for past two fiscal years)
  - Indicated whether they have been audited.





# Financial Statements- Facts & Figures For GSA

## What GSA Looks For:

- Short-term Liquidity: Current Ratio, Quick Ratio, etc.
- Long-term solvency: Debt to Equity Ratio
- Sales: Average sales, annual sales growth, etc.
- General Guidelines:
  - More Assets than Liabilities
  - Have significant sales - positive sales trend
  - Access to credit
  - Be proactive - explain any issues





## The Proposal Preparation

- Contains Proposed SINs
- Preponderance of work (NAICS Code)
- Annual Sales Projections per SIN
- PWS/SOW extracts from Past & Present Contracts
- Past Schedule contracts-
- Required clauses e.g. Delivery Info, Marketing POC, etc.
- Authorized Negotiators
- Inputs entered into the eOffer system
- Final document generated by the eOffer system



## **Reselling – Anything you Want To Add?**

- THIS IS FOR A DETERMINATION TO ADD PRODUCTS:
  - Submit complete Letter(s) of Supply from Manufacturers or other evidence of sustainable sources of supply
  - Letter of Supply template is available in solicitation attachments

**NOT PLANNED WITH SUBMISSION**



## **Additional Compliance Checks**

### **Commercial Agreements**

- All agreements WILL be submitted for review.
- Terms and conditions WILL be FAR-compliant
- Agreements include – EULAs, Service Agreements, etc.

### **Production Point**

- Location where “End Product” was manufactured
- Establishes Trade Agreement Act Compliance

**NOT PLANNED WITH SUBMISSION**



# **Additional Required Documents I am Preparing**

## **Agent Authorization Letter**

- Identifies any third parties authorized to discuss offer.
- Identifies pre & post award authority to:
  - Sign contract actions
  - Negotiate with the Government
  - Submit modifications
- Required template is include in the solicitation.

## **Sub-contracting Plan**

- Not Planned



# Technical Proposal







## Evaluation Factors

- Factor 1: Corporate Experience
- Factor 2: Past Performance
- Factor 3: Quality Control



# Evaluation Factors

## Factor 1: Corporate Experience -

- Two (2) page maximum I am working with in detailing:
  - Years of relevant experience (Min. 1 Year Best at 2 Years)
  - Organization's structure, including size, experience and resources
  - Brief history of the organization's activities
  - Ability to acquire resources/manpower proposed
  - Schedule-specific marketing strategy



# Evaluation Factors

## Factor 2: Past Performance

- Past Performance Evaluation from Open Ratings, Inc. (ORI).
  - Available at: <http://www.ppereports.com>
  - Minimum of six (6) references
  - May take up to 30 days to receive report
  - Cost of the report is at offeror's expense (Approx \$185)
  - Valid for 1 year.
- Address any negative feedback in the report:
  - Provide a plan to mitigate the concerns.





# Evaluation Factors

## Factor 3: Quality Control

- Work on a description of internal review procedures that facilitate high-quality standards
- Identification of individuals responsible for ensuring quality control-
- How potential problem areas and solutions are handled
- How quality control will be managed when completing multiple projects for multiple agencies simultaneously



# Pricing Proposal



Administrative Requirement

Technical Proposal

Pricing Proposal

Proposal Submission & Award



# Pricing Proposal/Narrative I Am Working to Finalize

- Pricing Proposal Document (template in solicitation):
  - Special Item Number
  - Item Description & Part Number (Table Format Here)
  - Commercial Rate
  - GSA Discounts & Pricing (with and without Industrial Funding Fee)
  - Most Favored Customer Discount & Pricing
  - Volume Discounts, Warranty, Etc..
- Submission Must Haves:
  - Commercial Price/Market List (including effective date)
  - Pricing support (invoices, quote sheets, etc.) for all items

# Proposal Pricing Document-

Schedule # 70– Information Technology, Software Services

SIN(s) PROPOSED	SERVICE PROPOSED (e.g. Job Title/Task)	MINIMUM EDUCATION / CERTIFICAT ION LEVEL	MINIMUM YEARS OF EXPERIENC E	COMMERCIAL LIST PRICE (CPL) OR MARKET PRICES	UNIT OF ISSUE (e.g. Hour, Task, Sq ft)	MOST FAVORED CUSTOMER (MFC)	BEST DISCOUNT OFFERED TO MFC (%)	MFC PRICE	GSA(%) DISCOUNT (exclusive of the .75% IFF)	PRICE OFFERED TO GSA (excluding IFF)	PRICE OFFERED TO GSA (including IFF)	QUNATITY/ VOLUME DISCOUNT

Most Favored Customer's Discount or Discount Range (MFC) \_\_\_\_\_.  
 GSA's Discount or Discount Range W/O IFF \_\_\_\_\_.  
 Quantity/Volume Discount \_\_\_\_\_.

## Acronyms

UOI: Unit of Issue  
 COO: Country of Origin  
 SIN: Special Item Number  
 MFC: Most Favored Customer  
 IFF: Industrial Funding Fee (Clause 552.238-74): Fee is 0.75% (less than 1%)  
     IFF Calculation      List Price: \$100.00  
                                     GSA % Discount: 10%  
                                     GSA Price excluding IFF: \$90.00  
                                     GSA Price including IFF: \$90.00/0.9925 = \$90.68

# Labor Category Matrix – ONLY IF USED IN SALES

## APPROACH

Commercial Labor Category	Minimum/ General Experience and Years of Experience	Functional Responsibility	Educational Requirements	Contract #D12345 Sub or Prime T&M or FFP? Period of Contract:	UAF Contract # E12345 Sub or Prime T&M or FFP? Period of Contract:	Boeing Contract # F2345 Sub or Prime T&M or FFP? Period of Contract:	Commercial Rate ** Show Effective Date of Pricelist	Proposed GSA Schedule Rate without IFF
Program Manager	10 Years Experience  Or state " Same as GSA pricelist" if in fact it is the same.	State what the individual's function was/is (not duties) on the contract(s) shown or state " Same as GSA pricelist" if in fact it is the same.	Bachelor's Degree* in Computer Science, Engineering, or Information Technology Or state " Same as GSA pricelist" if in fact it is the same.	\$135	\$135	\$135	\$135	\$135
System Engineer	5 Years Experience  Or state " Same as GSA pricelist" if in fact it is the same.	State what the individual's function was/is (not duties) on the contract(s) shown or state " Same as GSA pricelist" if in fact it is the same.		\$135	\$135	\$135	\$135	\$135





# Commercial Sales Practices (CSP)

## What is the CSP?

- Details of offeror's discounting practices & policies.
- Prepared for each SIN offered
- Entered into eOffer system

## Must provide:

- Sales to the general public – 12-month period
- Projected sales under this contract
- Discounting Policies or Standard CSP
  - Matrix of Customers and Discounts
  - Narrative description

# Commercial Sales Practice Matrix Sample

Use for Most Favored Customer Analysis

Type of Customer	Standard Discounts & Pricing Policies	Non-Standard Discounts (including degree and frequency)	Prompt Payment Discount	% of Gross Sales
State & Local Governments	10%	None	None	30%
National & Corporate Accounts	Does not sell to the category of customer	None	None	
Commercial End Users	16%	None	None	10%
Other Federal Government (List individual agencies)	NASA - 15% US Air Force – 10%	None	None	60%
Other: (Specify)				
GSA Discounts	20%			



## Price Reductions Clause

### GSAR 552.238-75

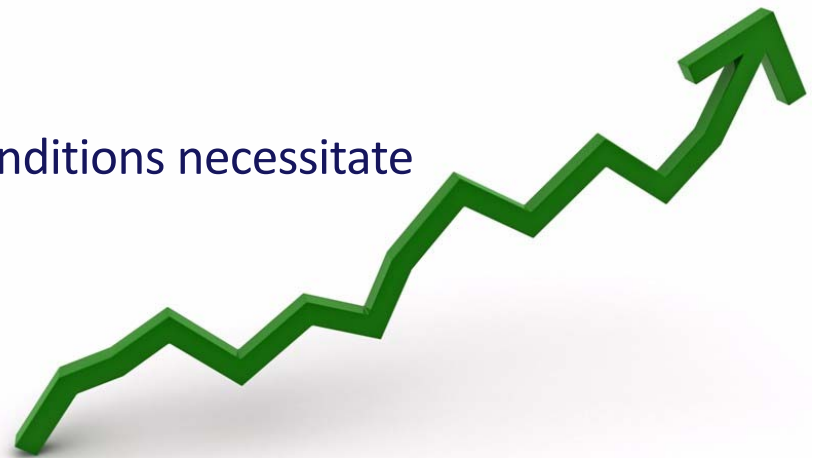
- Establishes a Basis of Award Customer/Most Favored Customer Relationship
- Relationship shall not be disturbed
- Price reductions shall apply when contractor:
  - Revises the commercial catalog to reduce prices;
  - Grants more favorable discounts or terms and conditions
  - Grants special discounts to the BOA customer



## Economic Price Adjustment Clause

### **GSAR 552.216-70: Items/Services with a Commercial Pricelist**

- Prices increases based on increases to commercial price list
- No increases in the first 12 months
- Up to 3 increases per 12 month period
  - Not to exceed 10%
  - Govt. may raise ceiling if market conditions necessitate





## Economic Price Adjustment Clause

I-FSS-969: Contracts Not Based on a Commercial Pricelist

- Annual Escalation Rate
  - Percentage Rate for each 5-year contract period
- Market Indicator (typically the Employment Cost Index)





## Price List Overview- Post Award Actions

- Will be uploaded to GSA Advantage & GSA eLibrary
- Visible to potential ordering agencies
- Clause I-FSS-600 provides the format for the pricelist:
  - Identify SINs and items offered
  - Pricing
  - Geographic Scope of Contract
  - Payment and Delivery Info
  - Terms and Conditions

## Compensation Plan for Professional Employees- May or May not be Utilized

- Required for any services offerings
- May submit general compensation practices from Offeror's Employee Handbook – not for product
- WILL include information about:
  - Paid vacation/sick leave policies
  - Healthcare benefits (if any)
  - Retirement benefits (if any)
- Should be in line with industry compensation practices





# Proposal Submission & Award



Administrative  
Requirement

Technical  
Proposal

Pricing  
Proposal

Proposal  
Submission &  
Award





## Recap:

- **Administrative/Contract Data:**
  - Readiness Assessment
  - Pathways to Success Certificate
  - Financial Statements
  - Offer Responses Document
  - Production Point
  - Commercial Agreements
- **Technical Proposal:**
  - Evaluation Factor Documents
- **Pricing Proposal:**
  - Commercial Pricelist/Market Rate Sheet
  - Proposed Pricing Document
  - Commercial Sales Practices Format (CSP-1)
  - Economic Price Adjustment (EPA) Mechanism
  - Labor Category Matrix and Descriptions (optional when only products)
  - Professional Compensation Plan (Only if used in approach)



***Your Battle Plan***

## Final Tips for Success

- Read and understand the important solicitation sections
- Be proactive – clearly explain any weaknesses
  - Provide any mitigating information
- Ensure all figures are consistent throughout offer
- Submit all required documents
- Be prepared to negotiate





**TIME TO**



***CONTRACT FOR PROPOSAL IS \$5000 DOLLARS SPLIT  
INTO TWO PAYMENTS WITHIN A CLEAR CONTRACT  
EXPLAINING ALL RESPONSIBILITIES.***

## Award Process Overview For Your Reference:

