GSA SmartPay®

Supporting Your Mission

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GSA SmartPay® 3
Pre-Award Transition Checklist

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Purpose

This pre-award transition checklist, provided by the Center for Charge Card Management, is a resource for agencies to utilize as they transition to GSA SmartPay3® (SP3). This checklist covers tasks up to (but not after) placing the agency's task order. The Center for Charge Card Management (CCCM) will provide a separate post-award transition checklist that details the tasks agencies will carry out after they have awarded their task orders.

How to Use this Checklist

● The checklist should be used as a guide to help begin planning your agency's pre-award transition activities, but may be customized to include any and all of the tasks your agency should undertake.

● At a high level, there are six major tasks:

Define Current Needs	Develop Internal Communication Plan	Determine Task Order Type	Develop & Issue Task Order	Award Task Order	Develop Contingency Plan

● Each of the major tasks, as well as their subtasks, are described in the rows of the table below. If your agency chooses to add tasks, you may include them in additional rows.

● Each of the columns – Duration, Timeline, and Person Responsible – should be filled in by your agency, based on your specific needs.

● Task Duration will vary depending on the agency size, level of preparedness, and available resources/FTEs. The durations included in the checklist are estimates based on a medium-sized agency with 3-4 dedicated FTEs. You should revise the duration estimates as needed so that they reasonably reflect the effort required by your own agency.

● The Timeline and Person Responsible columns are blank, and should be filled out by your agency. Carefully consider competing initiatives when developing the timeline and identifying responsible parties to come up with a realistic plan.

● Keep in mind that task order requests can not be issued until the new Master Contracts are awarded AND you have received the contractors' presentation packages, which will be available at the kick-off conference several weeks after award of the Master Contract (i.e.,in the summer of FY2017). However, you can begin the preparation needed to issue a task order request (e.g., Task 1, Define Current Needs) earlier.

- Depending on your agency's decision on Task 3, Determine Task Order Type, different tasks will follow.

- Predecessors for each task denote other tasks that have to be completed before you can begin the task.

- Sample "Critical Path Diagrams" that show both the different "paths" you would follow, based on your agency's decision at Task 3, as well as the predecessors between tasks, are included as an Appendix to this checklist.

- Use of this checklist is not mandatory. This document is meant to be a resource to support your efforts.

Key Tasks	Duration	Timeline	Predecessors	Person Responsible
1. **Define Current Needs**	**6 months**		**N/A**	
a. Perform self assessment to determine where your program currently is and where you want to get to in the future program				
b. Identify the agency's system(s) interface requirements				
c. Develop a requirements document				
i. Review previous SP2 SOW, requirements, or tailored task orders for comparison and ideas. Discuss requirements and ideas with other similar sized agencies				
ii. Survey stakeholders where appropriate				
iii. Utilize GSA guidance				
d. Determine agency requirement for tag-alongs				
i. Communicate with current tag-along agencies and obtain feedback				
ii. Make updates to requirements document as necessary				
e. Plan resources for transition				
i. Determine necessary resources for pre- and post-award activities				

	ii. Identify potential funding sources				
2.	**Develop Internal Communication Plan**	**1 month**		**N/A**	
	a. Determine what needs to be announced, when, to whom, and how it needs to be announced				
	b. Update address lists, so that they are accurate. Cross-reference lists with HR/payroll systems				

3.	**Determine Task Order Type**	**2 weeks**		**1**	
	a. Identify gaps between the GSA SmartPay 3 program offerings and agency requirements				
	b. If the GSA SmartPay 3 program offerings meet agency requirements, follow tasks 4 and 11				
	c. If the GSA SmartPay 3 program offerings do not meet agency requirements, follow tasks 5-9 and 11				
	d. For agencies that want to tag-along (or be in a pool), identify agencies that permit tag-alongs (or research the GSA pool), and follow tasks 10 and 11				
4.	**Issue a Standard Task Order Request**	**1.5 months**		**1,3**	
	a. Review the task order guide and Contractor presentation packages				

(provided at the kick-off conference).				
b. If needed, contact the Master Contractors for additional information (Note: Fair consideration must be given to all qualified Contractors under the master contract.)				
c. If desired, request better pricing for products and services offered (CCCM recommends that all agencies provide historical payment and billing cycle information and request better pricing at the task order level)				
d. Agencies do not need to submit a separate statement of work with the standard task order request				
e. If desired, formally or informally compete the requirement or negotiate with Contractors (this is not required with standard task orders)				
5. **Write SOW[1]/Tailored Task Order Request**	**6 months**		**1,3**	
a. Identify specific resources for writing the SOW				
b. Translate requirements into SOW language				
c. Develop evaluation framework				

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[1] Statement of Work

	Duration			
d. Finalize SOW/tailored task order request[2]				
i. Establish evaluation factors				
ii. Determine evaluation strategy				
6. Issue SOW/Tailored Task Order Request (CCCM recommends agencies allow one month response period, assuming no provision for questions and clarifications)	**1 month**		**5**	
a. Respond to inquiries about the SOW				
b. Collect quotations				
7. Convene Task Order Response Evaluation Panel	**3 months**			
a. Draft guidance for the Panel				
b. Determine participants (including IT, finance, procurement, purchase, travel, fleet, and integrated personnel, as required)				
c. Determine the roles and responsibilities of the Evaluation Panel members				
8. Evaluate Responses	**1 month**		**6**	
a. Evaluate quotations (technical and pricing)				
b. Conduct and evaluate oral presentations (if needed/ desired)				

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[2] GSA will provide samples and templates of task order requests.

c. Document findings/develop technical evaluation reports, consensus reports, etc. as required by agency procurement policies				
d. Conduct formal discussions with Contractor(s) if required (NOTE: Formal discussions can only be conducted by the agency's contracting officer)				

9. **Award Task Order**	**1 week**		**8**	
a. Award Final Task Order				
10. **Issue a Tag-Along or Pool**[3]	**2 months**		**1,3**	
a. Determine which agencies allow tag-alongs				
b. Determine which of these agencies best fulfills your agency's requirements				
c. Follow the guidelines and timelines established by the agency your agency is tagging-along with, or follow the guidelines and timelines GSA has established for its pool				
11. **Develop Contingency Plan**	**1 month**			
a. Develop a contingency plan in case of any delays or issues during the transition process (on the part of the Government or the contractor)				

[3] GSA will provide additional guidance specific to tags and pools.

Appendix

Sample Critical Path Diagrams
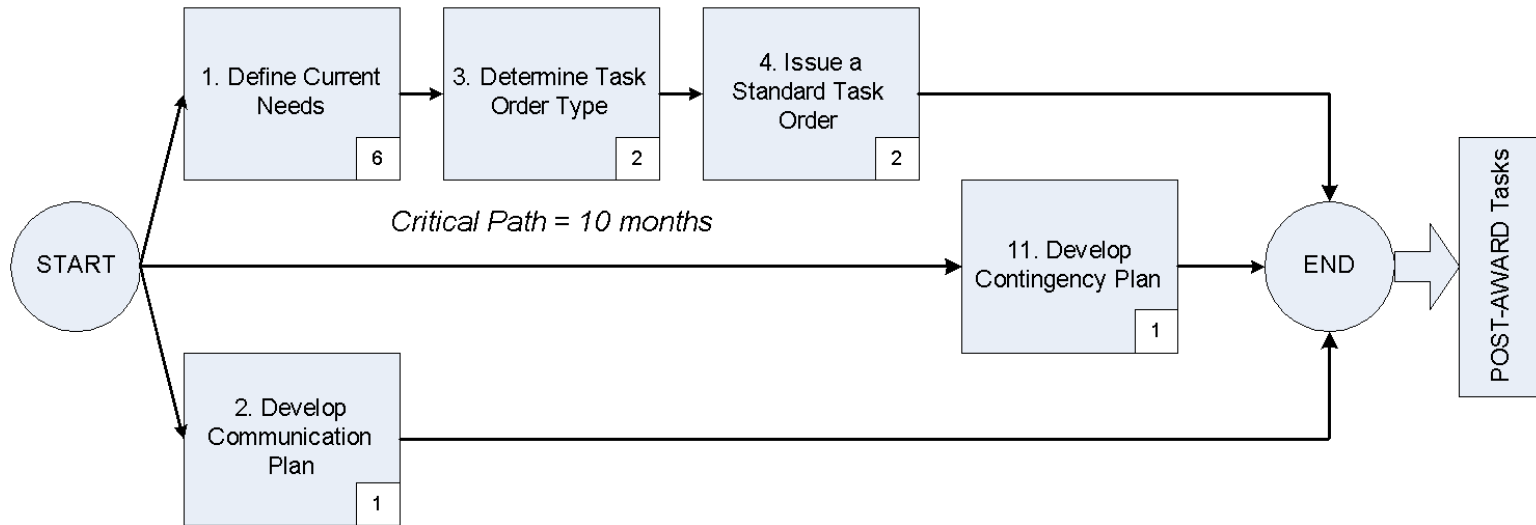
Reading the Critical Path Diagram

The Critical Path Diagram is an important tool in project management. The diagram is a visual representation to help project managers determine the shortest possible duration of a project, based on the duration of each task, and the dependencies between tasks. The example above shows how one should read and interpret a critical path diagram, from left to right.

Example: Building a House
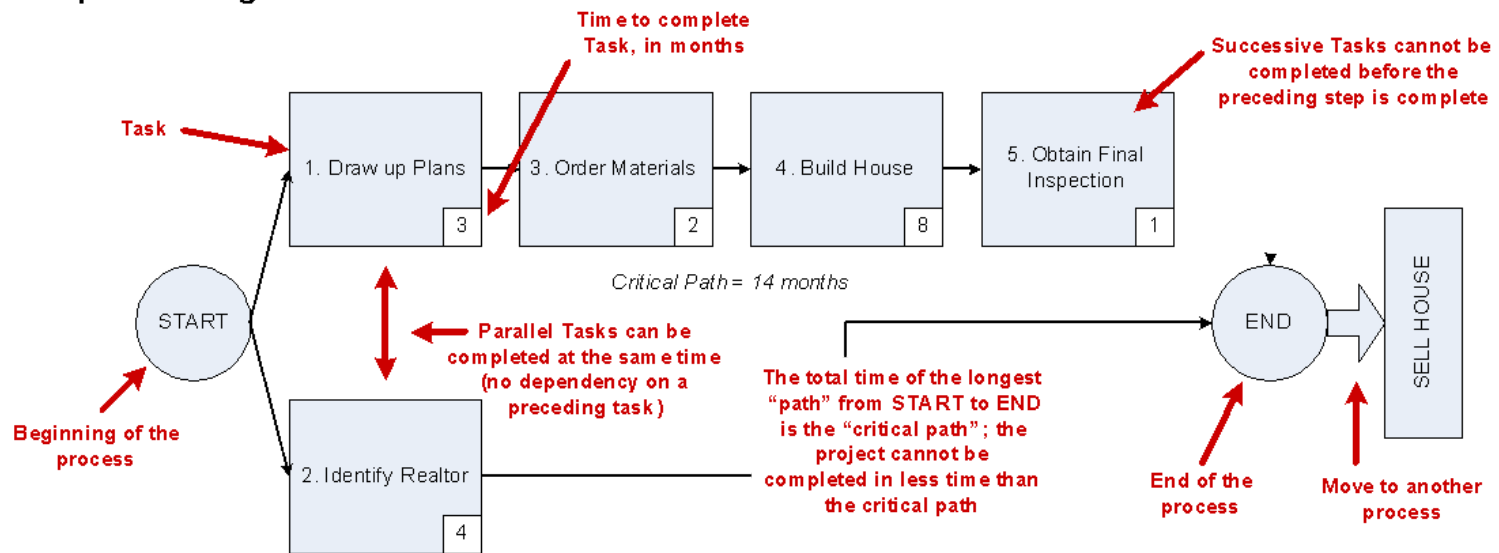
Three sample critical path diagrams have been developed for the pre-award transition activities, based on the estimated durations included in the checklist. Each of the three diagrams corresponds to a possible "path", which agencies will determine at Task 3, Determine Task Order Type. At that point, agencies will choose to: (1) issue a standard task order, (2) issue a tailored task order, or (3) tag-along or pool with other agencies. The sample critical path diagrams for each of these "paths" are included on the following pages.

Critical Path Diagram for Standard Task Order Option

START

1. Define Current Needs — 6

3. Determine Task Order Type — 2

4. Issue a Standard Task Order — 2

Critical Path = 10 months

2. Develop Communication Plan — 1

11. Develop Contingency Plan — 1

END

POST-AWARD Tasks

Critical Path Diagram for Tailored Task Order Option

5. Write Tailored Task Order — 4

6. Issue Tailored Task Order Request — 1

8. Evaluate Responses — 1

9. Make Award — 1

Critical Path = 16 months

1. Define Current Needs — 6

3. Determine Task Order Type — 2

7. Convene Technical Evaluation Panel (TEP) — 6

11. Develop Contingency Plan — 1

2. Develop Communication Plan — 1

START

END

POST-AWARD Tasks
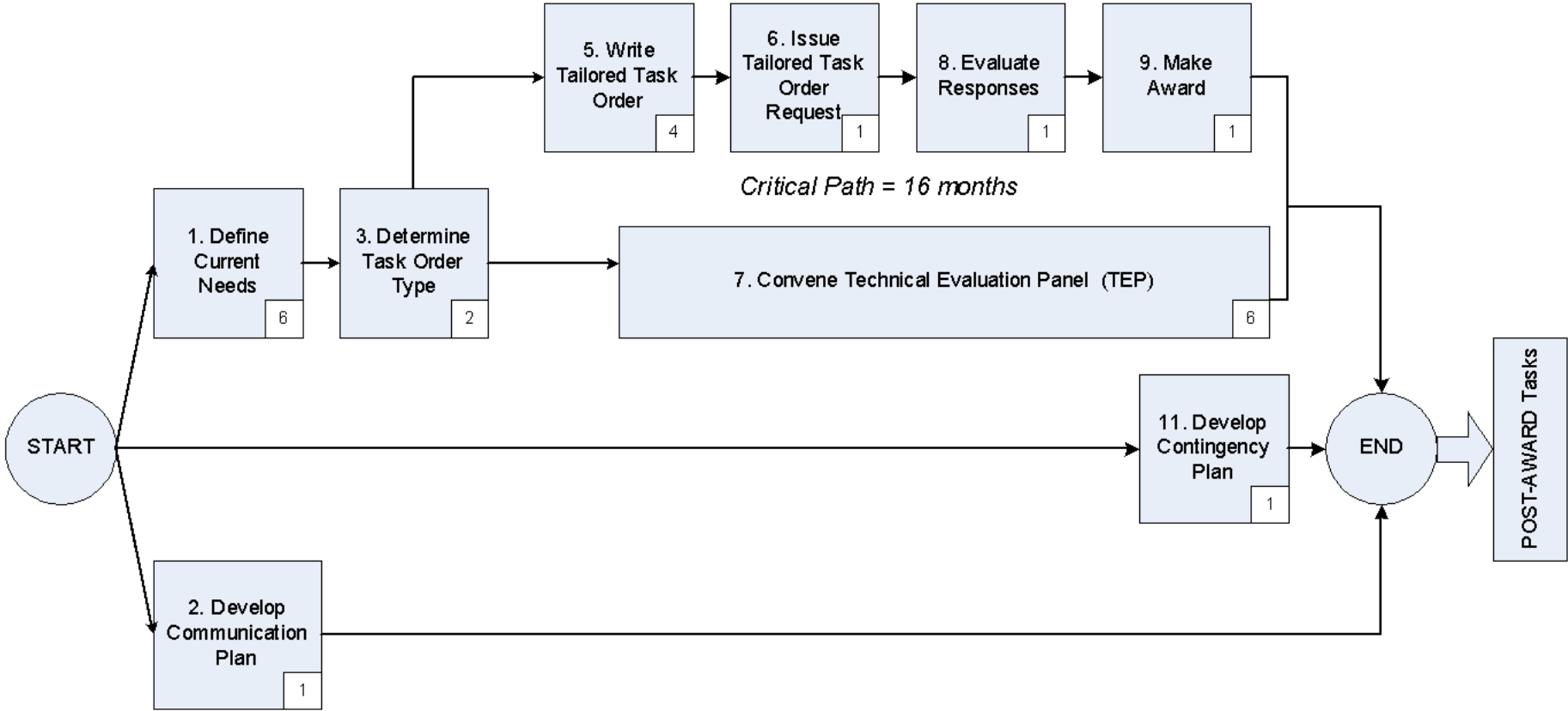
Critical Path Diagram for the Tag-Along or Pool Options


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START

1. Define Current Needs  [6]
→ 3. Determine Task Order Type  [2]
→ 10. Issue a Tag-Along or Pool  [2]

Critical Path = 10 months

11. Develop Contingency Plan  [1]

2. Develop Communication Plan  [1]

END

POST-AWARD Tasks
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