GSA SmartPay®
Task Order Type Tool

Purpose

The Task Order Type Tool was designed to assist lead A/OPCs and/or their Contracting Officers as they conduct their agencies'/organizations' Pre-Award transition activities. Determining Task Order Type is one of the six major tasks contained in the **GSA SmartPay 3 PreAward Transition Checklist** as shown below:

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

Agencies/organizations can use this tool when considering which of the four task order types – **Standard**, **Tailored**, **Tag-along**, or **Pool** – will best fit their needs.

Upon completion of this tool, A/OPCs will have written an explanation for their recommended task order type that is specific to their agency/organization. This explanation can be used to facilitate a discussion with agency/organization executives to gain approval for the recommendation.

How to Use this Tool

● This tool is meant to be used following completion of the **Needs Assessment Tool**. Agency/organization needs will be a critical factor in selecting a task order type. Have a copy of your completed or in-progress Needs Assessment Tool available for reference as you begin to use this tool.

● This tool provides a series of questions and considerations to help determine which type of task order will best fit the agency's/organization's needs, including:

   o Descriptions of each task order type;

   o Pros and cons for each task order type;

   o Step-by-step instructions for selecting a task order type;

   o Factors to consider when determining the task order type; and

   o A template for explaining your recommended task order type to agency/organization executives.

● If you are a lead A/OPC, you may find it helpful to work through this tool with your Contracting Officer and/or to ask your Contracting Officer to review your recommendation before briefing your agency/organization executives.

Use of this tool is not mandatory. This document is meant to be a resource to support your transition efforts. Should you have any additional questions, please contact the Center for Charge Card Management (CCCM) at gsa_smartpay@gsa.gov or (703) 605-2808.

Overview of the Task Order Types

Introduction

Begin by reviewing the brief descriptions below to gain a general understanding of each of the four possible task order types:

- **Standard**: Contains the same requirements as the GSA SmartPay 3 (SP3) Master Contracts, but also allows agencies/organizations the flexibility to diverge from "defaults"[1] in the Master Contracts as needed.

- **Tailored**: Includes additional, agency/organization-specific requirements, which, as a rule of thumb, would increase the level of effort required from the Contractor beyond what is required under the Master Contracts, but still within their scope.

- **Tag-along**: Involves using another agency's/organization's task order. Agencies/organizations that tag-along will receive the same services as the lead agency/organization within the tag-along arrangement. The lead agency/organization may or may not charge a fee for the tag-along arrangement.

- **"Pooling" arrangement:** Two or more agencies/organizations collaborate to develop and issue one task order which will meet the agencies'/organizations' needs.

Requirements of All Task Order Types

Regardless of the type of task order selected, agencies/organizations must comply with Federal Acquisition Regulations (FAR), in particular those related to **acquisition plans** and **fair opportunity**.

Acquisition Plans:

Agencies/organizations are not exempt from FAR requirements involving the development of an Acquisition Plan (FAR 16.505(a)(7)(i)); the acquisition plan must be approved internally before the task order can be issued. Acquisition plans must include the task order type as well as the reasons for selecting the task order type. In addition, each agency/organization has specific requirements which must be met in order to issue task orders. A/OPCs must work closely with their contracting personnel to ensure all internal agency/organization requirements, and FAR regulations for issuing task orders are met.

Fair Opportunity:

Agencies/organizations must give fair opportunity to all Contractors. Fair opportunity requires reviewing all Master Contractors awarded the required business lines/CLINs for potential award. This can be accomplished through agency/organization review of the presentation packages. For more information on fair opportunity, see FAR 16.505(b)(1).

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[1] There are a number of clauses in the Master Contracts followed by the statement: "unless otherwise specified by the agency/organization at the task order level", or similar text. These requirements are known as "defaults" and, as stated, allow for flexibilities (within scope) at the task order level..

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Detailed Task Order Type Descriptions

Each task order type is described in detail below. Please review in detail to gain a clear understanding of each of the different task order types.

Standard Task Order:

If the products and services in the Master Contracts meet your agency's/organization's requirements, then you should choose the standard task order approach. It is expected that a standard task order will meet the needs of the majority of agencies/organizations. Developing and awarding a standard task order consists of three major tasks: developing the task order request (which documents the agency's/organization's selected alternatives to the "defaults" in the Master Contracts, among other information), evaluating the Contractors' task order fair opportunity proposals, and developing the task order award document. **A separate statement of work (SOW) is not required.**

Under a standard task order, the agency/organization could solicit task order fair opportunity proposals from only the Contractors that meet the agency's/organization's needs. CCCM requires that your agency/organization request a price proposal from the Contractor(s) awarded the required business lines/CLINs. Agencies/organizations can provide historical sales information and payment information (ie. length of billing cycle, speed of payment). Contractors are not required to provide better pricing, but all Contractors awarded the required business lines/CLINs should be offered the opportunity.

Tailored Task Order:

If you find that there are unique provisions, products, or services that the agency/organization requires that are not included as a standard offering under the Master Contracts, but are within the scope of the Master Contracts – for example, reporting is included within the scope of the Master Contract but a specific report your agency/organization may need is not included in the standard offering – you may choose to develop a tailored task order.

The purpose of the tailored task order is to incorporate additional agency/organization-specific requirements that are not included in the Master Contracts. Developing and awarding a tailored task order also consists of the three major tasks listed above, but each step is more complex and time consuming. Developing the task order request includes the documentation of the agency's/organization's additional requirements in a SOW. Evaluating the Contractors' responses is a longer process, which may include the formation of a Technical Evaluation Panel (TEP). Finally, developing the task order award document involves additional work as well. Be sure to document in the contract file the "rationale for place and pricing of each order", as discussed in FAR regulations (FAR 16.505(b)(4)).

You should also develop an evaluation framework so you can rate fair opportunity proposals based on the factors that are most important to meet the agency's/organization's needs. (Note: Consult your agency's/organization's procurement policies for additional documentation requirements in addition to those outlined here.) The agency/organization contracting officials must be included in this process. You may also contact CCCM at gsa_smartpay@gsa.gov or (703) 605-2808 for additional assistance.

Tag-Along:

Agencies/organizations which do not have the desire or resources to develop their own task order may wish to pursue a tag-along arrangement with an agency/organization that has the same or similar requirements built into its own task order (either standard or tailored). Under a tag-along agreement, the agency/organization agrees to the terms of the lead agency's/organization's task order and receives the

same services and pricing as the lead agency/organization. (Note: The lead agency/organization may charge a fee for use of its task order.)

If you are interested in tagging-along on another agency's/organization's task order, and their task order meets the agency's/organization's needs, you should contact the agency/organization to see if they allow tagging-along. Lead agencies/organizations must state whether or not they allow tag-alongs in their task orders; the lead agency/organization may or may not charge a fee for tagging-along. GSA will allow other agencies/organizations to tag-along with its task order(s), and does not charge a fee. Note: An agency requiring paper invoices or reports for centrally billed accounts can not tag along under GSA's task order. GSA's task order is 100% electronic for centrally billed accounts.

In a tag-along arrangement, task order development, award (including observing fair opportunity), and administration activities will be performed by the lead agency/organization; tag-along agencies/organizations are not responsible for developing and awarding an individual task order.

For additional support in identifying agencies/organizations with which to tag-along, please contact CCCM at gsa_smartpay@gsa.gov or (703) 605-2808.

Pool:

A pooling arrangement is one whereby two or more agencies/organizations develop a combined set of requirements (which may be a standard task order, or a tailored task order), and jointly issue one task order. Agencies/Organizations have the option of requesting GSA assistance to facilitate pooling arrangements. Interested agencies/organizations may contact GSA at gsa_smartpay@gsa.gov or (703) 605-2808 for additional assistance.

Pros and Cons of Each Type

Consider the following pros and cons listed in the table below for each task order type. You may wish to refer to this chart as you proceed through the remainder of this tool to help you explain the recommendations you make for your agency/organization.

Table 1: Pros and Cons

Task Order Type	Pros	Cons
Standard	• Streamlined task order award process: task order request documents the variations from the "defaults" in the Master Contract and simpler evaluation process • May require fewer resources for pre-award activities and facilitate a faster award	• The Master Contract requirements may not address unique agency/organization needs
Tailored	• Provides flexibility to request additional agency/organization-specific requirements (still within the scope of the Master Contracts) to meet unique agency/organization needs	• Requires development of a more detailed task order request, and a technical evaluation of offers (i.e., longer process that may require additional agency/organization resources)

		● May result in a longer time to award, allowing less time for post-award activities
Tag-along	● Streamlined task order award process -- task order request documents the variations from the "defaults" in the Master Contract and simpler evaluation process ● Provides additional services/products listed in the lead agency's/organization's task order, but that were not specified in the Master Contract ● For a small agency/organization, this option may provide a higher refund than the agency/organization could negotiate on its own (due to level of spend).	● Tag-along agencies/organizations have no direct control over the timing of the transition to SP3; they must transition on the same date as the lead agency/organization. ● There may be costs involved (e.g., if the lead agency/organization charges an administrative fee) ● This option provides less flexibility to the tag-along agency/organization to specify unique needs; the lead agency/organization typically determines requirements for task order
Pool (Standard)	● For a group of small agencies/ organizations, this option may provide a higher refund than the agencies/ organizations could negotiate on their own (due to combined level of spend) ● Streamlined task order award process; task order request documents the variations from the "defaults" in the Master Contract and simpler evaluation process	● Requires coordination and cooperation between agencies/organizations ● The Master Contract requirements may not address very unique agency/organization needs
Pool (Tailored)	● For a group of small agencies/organizations, this option may provide a higher refund than the agencies/organizations could negotiate on their own (due to combined level of spend) ● Provides flexibility to request additional services or change the "defaults" in the Master Contract to meet unique agency/organization needs	● This is probably the most difficult task order process, because it requires coordination and cooperation between agencies/organizations to define common requirements; in most cases, this will not be the best option for agencies/organizations. This option is most feasible in unique cases where 2 or more agencies/organizations have very similar requirements *and* the resources needed to share task order award tasks ● Requires joint development of task order request, technical evaluation of offers (i.e., longer process that requires agency/organization resources) ● Agencies/organizations might achieve the same (or even better) pricing with a tag along task order

Selecting a Task Order Type

Narrowing Down the Field

While you may have already eliminated one or more task order types by reviewing the previous sections, it will be useful to complete the exercise on the following pages to ensure that you fully consider each option and that you are making an informed decision. There are two or three major decisions to make (as shown in **Figure 1**, below) as you narrow down the options to find the best fit for the agency's/organization's needs:

Standard vs. Tailored:

Do the standard offerings under the Master Contract meet the agency's/organization's needs (i.e., standard task order), or does the agency/organization have specific needs which will need to be outlined specifically in the task order (i.e., tailored task order)?


Work Alone vs. Join With Others:

Should the agency/organization write its own task order, or join along with other agencies/organizations (i.e., tag-along or pool)?

If the agency/organization decides to join along with other agencies/organizations and share a task order, there is one additional decision to make:

Tag-along vs. Pool:

Should the agency/organization tag-along with a lead agency/organization? Or should the agency/organization join a pool with other agencies/organizations and jointly write the task order?

Figure 1: Task Order Type Decision Process
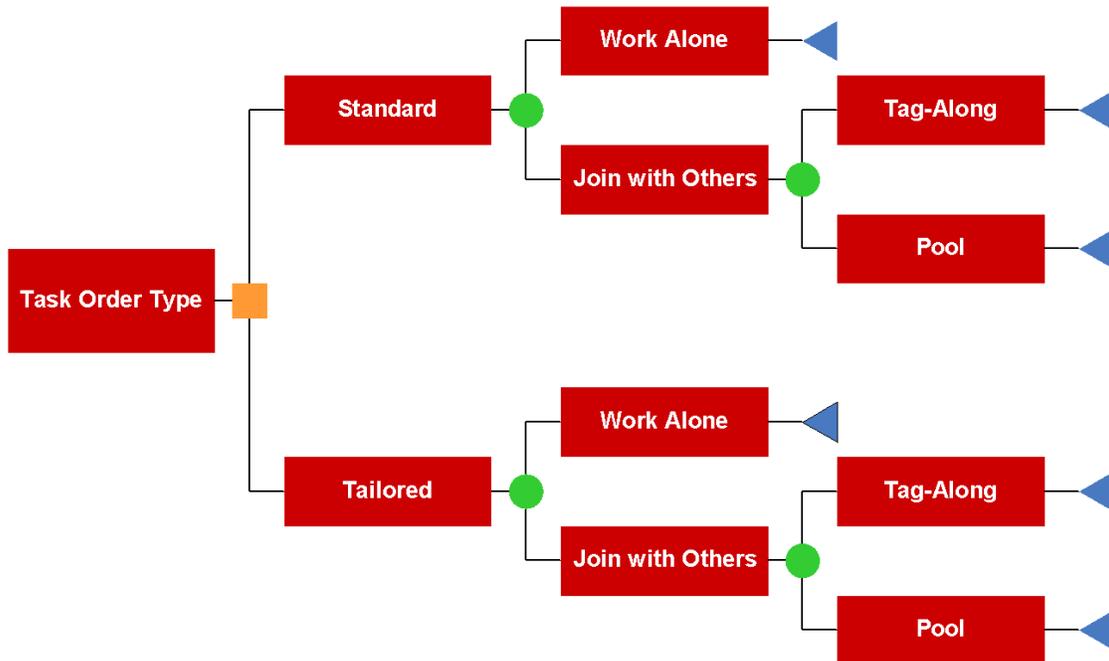
This section will walk you through the decision process as explained on the previous page. Begin with Step 1 (below), and proceed as instructed. Each step has been developed to direct you to the next set of options based on the choices you make along the way, so you may not need to complete all 3 steps. If you have questions, you may find it helpful to ask other agency/organization personnel or CCCM for assistance.

Step 1: Standard Task Order vs. Tailored Task Order:

It may be useful to consider the following factors (listed below in priority order) when determining whether the agency/organization needs a standard or tailored task order type. The answer to 1.a, "Agency/Organization Needs" below may be the most compelling argument for your choice.

1.a. Agency/Organization Needs

You may recall that a tailored task order is required if an agency/organization wants to include specific requirements that are not included, but still within the overall scope of the Master Contracts. Review the needs that the agency/organization identified using the Needs Assessment Tool. If you answered "yes" to any of the questions in the Needs Assessment Tool listed in **Table 2** below, you will need to write a tailored task order. Review **Table 2** and **circle the questions to which you answered "yes"**. Next, review all of the "yes" answers and indicate whether the need indicated is a low, medium, or high priority for the agency/organization in the "Priority Level" column.

Table 2: Needs Assessment Tool Questions Which Indicate a Tailored Task Order

Section in Needs Assessment Tool	Question Number	Priority Level (Low, Medium, High)
II.C. Customer Service	6, 7, 8, 9	
II.D. Quality Assurance	10, 11, 14	
II.E. Establishing & Maintaining Accounts	18, 22	
II.F. GSA SmartPay Tax Advantage Card Accounts	25, 26, 27, 28,	
II.G. Delinquency and Suspension	30, 32	
II.J. Emergency Card Use	34	
II.K. Tax Exemption / Reclamation	35, 37	
II.L. Merchant Acceptance	38, 39	
II.M. Strategic Sourcing	40	
II.N. Program Monitoring and Analytics	41, 42, 43, 44	
II.O. Fees	45, 46, 47	
II.P. Invoicing / Billing / Payment	48, 49, 50, 51, 53, 54, 55, 56, 59, 61, 63	
II.Q. Electronic Access System (EAS)	64, 65, 66	
II.R. Security	70, 71, 72, 73, 74,	
II.S. Data	76, 77, 79, 82	
II.T. Reporting	83, 84, 85	
II.U. Record Retention / Retrieval	86, 87	
II.V. Communications	89	
II.W. Knowledge Sharing	90	
II.X. Training	92, 93, 94, 95, 96, 97	
II.Y. Transition	98, 105	
II.Z. Controls / Authorization / Notification / Alerts / Risk Mitigation	114, 115, 117, 118, 119	
II.AA. Contracting	120	

If the agency's/organization's answers to the questions you circled in **Table 2** reflect needs/requirements which are high priorities for the agency/organization, then the best option is a tailored task order. However, if the needs/requirements identified above are moderate to low priorities, you may want to reconsider the answer to that question, and reassess whether a tailored task order is actually the best option for the agency/organization. Regardless of your choice at this point, review Sections 1.b. and 1.c. below to ensure that you have considered all relevant factors.

1.b. Agency/Organization Resources

In general, the development and award of a tailored task order will likely require more resources than the development and award of a standard task order.

Developing/writing the task order request: A tailored task order request needs to document only those requirements which are not considered standard offerings under the Master Contracts. An agency/organization with a significant number of "yes" answers to the Needs Assessment Tool questions listed in **Table 2** may have a fairly complex and lengthy tailored task order, and therefore may require additional resources in order to write the task order. However, an agency/organization with only one or two "yes" answers above may find it fairly simple to develop its tailored task order, and may not require as many resources.

Task Order Evaluation and Award: The evaluation and award of a tailored task order includes additional steps beyond those required for awarding a standard task order. It can be assumed that more resources may be needed in order to award a tailored task order.

Consider any discussions you have had with your agency/organization executives (e.g., utilizing the Executive Briefing Tool) regarding the resources available to complete transition activities, and the potential for securing additional resources to support transition efforts. If you anticipate developing a fairly complex tailored task order, you may want to revisit the topic of additional resources with agency/organization executives to ensure that there are sufficient resources to support task order pre-award, award, and administration tasks.

1.c. Agency/Organization Size

Due to their size and complexity, it may be reasonable to assume that larger agencies/organizations are more likely to have needs that are unique, beyond the offerings (but still within the overall scope) of the Master Contracts. Conversely, many smaller agencies/organizations may find that the standard offerings of the Master Contracts meet their needs. However, this may not always be the case; it is not advised that larger agencies/organizations write tailored task orders simply because of their size. The Master Contracts under SP3 include greater flexibility than the current program, and it is very possible that a large agency/organization would find that a standard task order meets its needs.

Standard vs. Tailored Recommendation:

After considering the information above, make a choice for the agency/organization below.

□ Standard task order   □ Tailored task order

Standard vs. Tailored Explanation:

Next, cite the reasons behind your decision in the template provided in **Appendix B.** A sample explanation of this decision is provided below in **Table 3**. When you have written this explanation, proceed to Step 2 below

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Table 3: Sample Standard vs. Tailored Task Order Explanation

Topic	Rationale
Recommendation	The agency/organization will require a tailored task order.
Agency/organization Needs	The agency/organization has a unique need for a non-web-based electronic access system (EAS) (Question #66), which is an additional requirement for EAS functionality and not a specific offering under the Master Contracts.
Agency/organization Resources	The agency/organization already has the resources in place to complete task order award activities, and the work involved to complete these tasks will not overburden the staff.
Agency/organization Size	The agency/organization is large and complex, and has agency/organization-specific needs.

Why were other options eliminated?	The standard task order option was eliminated because the agency/organization has unique needs that were not addressed in the Master Contracts.

Step 2. Writing Your Own Task Order vs. Joining with Others in a Task Order:

When making a decision between writing your own task order and joining with others, you may want to consider the following factors (listed below in priority order):

2.a. Agency/Organization Size

In general, larger agencies/organizations may tend to want to write their own task orders, whether standard or tailored, while smaller agencies/organizations may wish to tag-along or pool to increase negotiating power with the banks (e.g., based on higher spend volumes achieved by pooling, or through the lead agency/organization in a tag-along arrangement). Larger agencies/organizations will likely have some higher degree of negotiating power due to their relative size.

2.b. Agency/Organization Resources

Agencies/organizations should consider the resources they have in place (or resources they anticipate being able to secure) to complete task order pre-award, award, and administration tasks. Agencies/organizations that already have resources in place to complete task order award activities may not feel a strong need to join with others. However, those agencies/organizations that do not have sufficient resources to support these activities may choose to join with others in writing, awarding, and managing a task order (either through a pool or tag-along) in order to reduce the administrative burden.

2.c. Agency/Organization Needs

If the agency's/organization's needs are very specific and unique, it may be difficult to find other agencies/organizations with similar needs with which to join in writing a task order. Therefore, the agency/organization may choose to write its own task order.

Be advised that by joining with others (i.e., being a tag-along or pool agency/organization) you may have limited latitude to shape the requirements of the task order, so the agency's/organization's unique needs may not be met. A tag-along agency/organization can mitigate some of this lack of control by researching other agencies'/organizations' needs, and choosing to tag-along with an agency/organization that has developed a task order that most closely meets its needs.

Work Alone vs. Join with Others Recommendation:

After considering the information above, make a choice for the agency/organization below.

□   The agency/organization will work alone to develop and award its task order.

□   The agency/organization will join with others in writing a task order.

Work Alone vs. Join with Others Explanation:

Next, cite the reasons behind your decision in the template provided in **Appendix B**. A sample explanation of this decision is provided below in **Table 4**.

Table 4: Sample Write Own Task Order vs. Join With Others Explanation

Topic	Rationale
Recommendation	The agency/organization will write its own task order.
Agency/Organization Size	The agency's/organization's card program spend is large enough to negotiate alone.
Agency/Organization Resources	The agency/organization has already secured resources to complete the task order process, so the administrative burden to complete these tasks is not overwhelming.
Agency/Organization Needs	The agency's/organization's needs may not be shared by other agencies/organizations; it will be difficult to find other agencies/organizations with similar enough needs to write a joint task order.

Why were other options eliminated?	The agency/organization will not join with other agencies because we are large enough to negotiate a good deal on our own, and we already have the resources to complete the task order award process.

If, at this point, you have decided to write your own task order, skip ahead to "**Explaining Your Recommendation**" on page 15. If you are recommending that the agency/organization join with others in a task order, proceed to Step 3 below to determine whether you will tag-along with a lead agency/organization or join a pool.

Step 3: Tag-along vs. Pool:

When deciding whether the agency/organization should join with a lead agency/organization by tagging-along, or join a pool with other agencies/organizations, it may be useful to review and consider the information included in **Table 5** on the following page.

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Table 5: Considerations for Joining With Others to Write a Task Order: Tag-alongs vs. Pools

Topic	Tag-along	Pool
Getting Started	● Agencies/organizations considering the option of tagging along should begin the process by talking to potential lead agencies/organizations about their needs, and determining which ones might have a task order that will fit the agency's/organization's needs ● It may be easier to find an agency/organization to tag-along with if you require a standard task order ● If you require a tailored task order, and cannot find an agency/organization to tag-along with that fits your needs, you may need to consider joining a pool or writing your own task order ● Agencies/organizations interested in tagging-along with GSA should contact the Center for Charge Card Management	● Agencies/organizations interested in joining a pool should contact the Center for Charge Card Management for assistance in identifying a pool to join
Coordination	● Once you choose an agency/organization to tag-along with, coordination with the lead agency/organization is all that is required to put the task order in place (i.e., there is no need to develop your own task order request and conduct proposal evaluations)	● Once you find a pool to join, coordination and cooperation with the other agencies/organizations in your pool will be necessary to complete the task order award process
Agency/ organization Resources	● As stated previously, no task order award process is required for a tag-along agency/organization; the task order is written and awarded by the lead agency/organization. Tag-along agencies/organizations will not need additional resources to support these efforts	● If you are joining the GSA Pool, the administration of the task order award process will be completed by GSA ● If you are not joining the GSA Pool, the responsibility for the task order award process is borne by the members in the pool. Some resources may be needed in order to complete these tasks ● **Tailored Pool**: This is probably the most difficult task order process, because it requires harmonization of different agencies'/organizations' needs, and coordination for evaluation and award
Cost	● Tag-along agencies/organizations may be required to pay an administrative fee to the lead agency/organization	● If you are joining the GSA Pool, there are no costs involved in pooling arrangements except for those associated with the resources necessary to support the administration of the pool's task order ● **Tailored Pool:** There may be costs involved with the resources needed to compile and agree upon requirements, and to develop, evaluate, and award the task order
Transition Timing	● Tag-along agencies/organizations have no direct control over the timing of the transition	● All agencies/organizations within the pool must transition on the same date.

	to SP2 because they must transition on the date that the lead agency/organization specifies in its task order. If you choose to tag-along, make sure the lead agency's/organization's transition timeline meets the agency's/organization's needs	This should be agreed upon early in the Needs Assessment phase

Tag-along vs. Pool Recommendation:

After considering the information in **Table 5**, make a choice for the agency/organization below.

☐   Tag-along   ☐   Pool

Tag-along vs. Pool Explanation:

Next, cite the reasons behind your decision in the template in **Appendix B**. A sample explanation of this decision is provided in **Table 6**, below.

Table 6: Sample Tag-along vs. Pool Explanation

Topic	Rationale
Recommendation	The agency/organization will join a pool.
Getting Started	The agency/organization will likely join the GSA pool.
Coordination	Coordination will be minimal; the Center for Charge Card Management will complete task order award tasks for the pool.
Agency/organization Resources	The agency/organization does not have the resources to complete task order award activities, and will only need to supply minimal resources under this scenario.
Cost	The agency/organization does not have the funding to provide a fee for administration of its task order.
Transition Timing	The agency/organization is flexible with regard to transition timing, and can adjust as necessary to transition at the same time as the rest of the pool.

Why were other options eliminated?	The tag-along option was eliminated because the agency/organization does not have the funding to pay an administrative fee to a lead agency/organization, and does not have the resources to administer its own task order.

Explaining Your Recommendation

Now that you have developed a recommendation for the type of task order that the agency/organization should use under the GSA SmartPay 3 program, you will need to obtain executive support to facilitate moving forward with task order development and award activities.

The next step is to develop a brief but comprehensive document to highlight the reasons behind your recommendation. You have already completed most of this explanation document (see **Appendix B**) by completing Steps 1-3. Now it's time to finalize your recommendation document by stating your final recommended task order type in the last row of Appendix B.

If you asked other agency/organization personnel to assist you in thinking through your task order type selection, you may want to ask for their assistance in developing this explanation, or you may wish to have them review it prior to sharing it with agency/organization executives. This document is intended to be used as a discussion document to help facilitate a meeting with agency/organization executives, and should not be used *in place* of a meeting.

Next Steps

Once you have obtained executive support for your decision, review the **Pre-Award Checklist** and move forward with task order award activities, based on the selected task order type. The Task Order Guide also provides guidance for all task order types regarding the next steps to complete.

Agencies/organizations that choose to join a pool or tag-along with another agency/organization should begin working to identify a pool or lead agency/organization, respectively, that will meet the agency's/organization's needs.

Agencies/organizations that choose to develop their own standard or tailored task orders should begin developing their task order requests (including the Acquisition Plan, other internal agency/organization required documents, and SOW) and evaluation criteria (Note: a formal evaluation plan is not required), utilizing the **Task Order Guide**.

Further Assistance

For further assistance or guidance with this transition tool, please contact the Center for Charge Card Management**.**

Appendix A

Sample: Explanation to Executive Personnel for Task Order Type Selection

This sample explanation document can be used as a reference when developing your own document to present to your agency/organization executives. This document will outline the reasons for your recommendation of the selected task order type.

Topic	Rationale		
What is the purpose of selecting a task order type, and why is it important?	The GSA SmartPay 3 (SP3) Master Contracts were written to be flexible to meet the needs of nearly 350 agencies and organizations that use the current program. Each agency/organization user must award a task order against the Master Contracts (or tag-along with another agency's/organization's awarded task order, or pool with others to award a task order). One of the first steps in this process is for the agency/organization to determine what task order type is needed.		
Task order type options	**Standard**: Contains the same requirements as the SP3 Master Contracts **Tailored**: Includes additional, agency/organization-specific requirements **Tag-along**: Involves "riding" another agency's/organization's task order **Pool**: Two or more agencies/organizations collaborate to develop and issue one task order which will meet the agencies'/organizations' needs		
Why is this task order type recommended?	**Standard vs. Tailored**	Agency / Organization Needs	The agency/organization has a unique need for a non-web-based electronic access system (EAS) (Question #66), which is an additional requirement for EAS functionality and not a specific offering under the Master Contracts.
		Agency / Organization Resources	The agency/organization already has the resources in place to complete task order development and award activities, and the work involved to complete these tasks will not overburden the staff.
		Agency / Organization Size	The agency/organization is large and complex, and has agency/organization-specific needs.
		Why was the other option eliminated?	The standard task order option was eliminated because the agency/organization has unique needs that were not addressed in the Master Contracts.
	Write Own vs. Join with Others	Agency / Organization Size	The agency's/organization's card program spend is large enough to negotiate alone.
		Agency / Organization Resources	The agency/organization has already secured resources to complete the task order process, so the administrative burden to complete these tasks is not overwhelming.

		Agency / Organization Needs	The agency's/organization's needs may not be shared by other agencies/organizations; it will be difficult to find others with similar enough needs to write a joint task order.
		Why was the other option eliminated?	The agency/organization will not join with other agencies because it is large enough to negotiate a good deal alone, and already has the resources to complete the task order award process.
	Tag-along vs. Pool	Getting Started	N/A
		Coordination	N/A
		Agency / Organization Resources	N/A
		Cost	N/A
		Transition Timing	N/A
Task order type recommended	**Tailored task order, written by our agency/organization**		

Appendix B

Template: Explanation to Executive Personnel for Task Order Type Selection

As you proceed through the "Selecting a Task Order Type", and "Explaining Your Recommendation" sections in this tool, you will be instructed to complete the "fill ins" in the table below (denoted by [red, underlined, bracketed text]).

Topic	Rationale		
What is the purpose of selecting a task order type, and why is it important?	The GSA SmartPay 3 (SP3) Master Contracts were written to be flexible to meet the needs of nearly 350 agencies and organizations that use the current program. Each agency/organization user must award a task order against the Master Contracts (or tag-along with another agency's/organization's awarded task order). One of the first steps in this process is for our agency/organization to determine what task order type is needed.		
Task order type options	● **Standard**: Contains the same requirements as the SP3 Master Contracts ● **Tailored**: Includes additional agency/organization-specific requirements ● **Tag-along**: Involves "riding" another agency's/organization's task order ● **Pool**: Two or more agencies/organizations collaborate to develop and issue one task order which will meet the agencies'/organizations' needs		
Why is this task order type recommended?	Standard vs. Tailored	Agency/Organization Needs	[Insert response for **Step 1**]
		Agency/Organization Resources	[Insert response for **Step 1**]
		Agency/Organization Size	[Insert response for **Step 1**]

		Why was the other option eliminated?	[Insert response for **Step 1**]
	Write Own **vs. Join with Others**	**Agency/Organization Size**	[Insert response for **Step 2**]
		Agency/Organization Resources	[Insert response for **Step 2**]
		Agency/Organization Needs	[Insert response for **Step 2**]
		Why was the other option eliminated?	[Insert response for **Step 2**]
	Tag-along vs. **Pool (if applicable)**	**Getting Started**	[Insert response for **Step 3**]
		Coordination	[Insert response for **Step 3**]
		Agency/Organization Resources	[Insert response for **Step 3**]
		Cost	[Insert response for **Step 3**]
		Transition Timing	[Insert response for **Step 3**]
		Why was the other option eliminated?	[Insert response for **Step 3**]
Task order type recommended	**[Insert final recommendation here]**		