



U.S. General Services Administration

GSA Multiple Award Schedule Ordering Guide

Quick Reference
Summer 2020

This guide sets forth the procedures for issuing orders against GSA Schedule contracts through the U.S. General Services Administration (GSA) Multiple Award Schedules (MAS) Program.

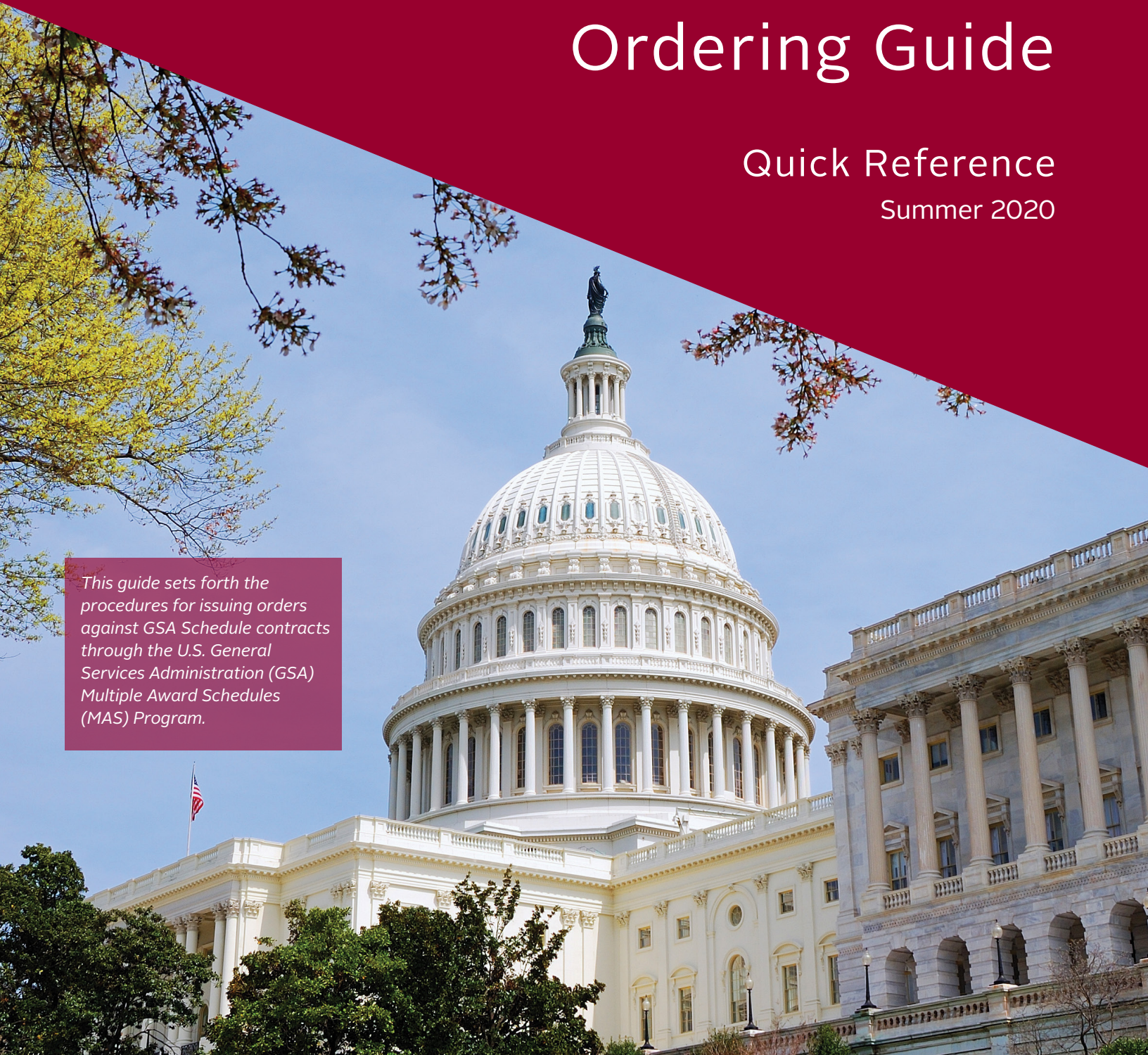




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Introduction

This guide will assist you throughout the acquisition process by explaining how to properly place an order against a GSA Multiple Award Schedule (MAS) contract and addressing contracting issues and concepts unique to ordering under MAS.

Throughout this guide, the terms “Schedule,” “GSA Schedule,” and “MAS” are used interchangeably. Each term refers to a GSA Schedule contract awarded under the MAS Program. The Federal Acquisition Regulation (FAR) refers to GSA Schedule contracts as “Federal Supply Schedules (FSS).”

The term “order” refers to task or delivery orders placed against a GSA Schedule contract.

Who Will Benefit from this Guide?

This guide is designed for all federal contracting personnel planning to use GSA Schedule contracts to meet their acquisition requirements. It will aid contracting professionals in their use of GSA Schedule contracts to deliver solutions to meet mission needs and streamline the procurement process.

When properly administered, orders under MAS contracts offer federal contracting professionals a streamlined process that will reduce procurement administrative lead time (PALT) through the use of streamlined procedures found in FAR Subpart 8.4.

Information to assist contracting professionals with using GSA Schedule contracts is available online at www.gsa.gov/schedules. For a deeper discussion of the topics discussed in this guide, please refer to the MAS Desk Reference (www.gsa.gov/masdeskreference).

Roles and Responsibilities

GSA is responsible for the award, administration, and management of the Federal Supply Schedules program. The ordering activity is responsible for the award, administration, management, and closeout of orders placed against Schedule contracts. The ordering activity must comply with the Schedule contract terms and conditions, the FAR, and local agency policies, as applicable.

GSA responsibilities:

- ❖ Administer GSA Schedule contracts, including annual subcontracting goal reporting, contract modifications to implement new FAR guidance, and updating the GSA Schedule contract terms and conditions, so they remain relevant and FAR compliant.
- ❖ Provide advice and guidance to ordering activities regarding GSA Schedule matters, as requested by the ordering activity.
- ❖ Negotiate fair and reasonable prices when awarding GSA Schedule contracts.

Ordering activity responsibilities:

- ❖ Define order requirements, including evaluation criteria.
- ❖ Prepare requirements documents for solicitations against Schedule contracts. This includes a Statement of Work (SOW) or Performance Work Statement (PWS) for task orders and product listings and other necessary information for delivery orders.
- ❖ Properly manage funds in accordance with (IAW) their agency rules and regulations.
- ❖ Evaluate quotes IAW the agency defined evaluation criteria.
- ❖ Monitor performance, including appointing a Contracting Officer's Representative (COR) when applicable.

Definitions

Ordering Contracting Officer (OCO): the agency-warranted Contracting Officer (CO) placing the order.

GSA Schedule Contracting Officer: the GSA-warranted PCO or ACO who awards and/or administers the GSA Schedule contract.

GSA Special Item Number (SIN): the unique identification number assigned to specific product or service categories under the Schedule.

Contractor Pricelist: the most favored customer pricing terms, which have been negotiated by GSA at the Schedule contract level.

Contractor Team Arrangement (CTA): two or more GSA Schedule contractors working together to provide a total solution to the ordering activity, whereby each contractor is working under their respective Schedule contracts. This is not a sub-prime arrangement. See www.gsa.gov/cta for more information.

Scope Determination

The ordering activity must determine whether the products and/or services required are within the scope of the GSA Schedule contract. The process for making a scope determination differs for products and services.

Scope Determination for Products

If the ordering activity has a bona-fide need for the product and it is available on the GSA contract, it is within scope. There is no requirement for the ordering activity to receive a GSA scope determination. Products awarded under the Schedule contract may be viewed at www.gsaadvantage.gsa.gov.

Scope Determination for Services

The ordering activity may use the steps below to verify that the requirement can be adequately met through a GSA Schedule contract:

Step 1: Check the Schedule category description using GSA eLibrary at www.gsaelibrary.gsa.gov. If the buyer is unsure of the scope fit based on this review, go to step 2.

Step 2: Review the category descriptions available in the GSA Schedule solicitation category attachments. The solicitation and category attachments may be accessed through <http://www.gsa.gov/mascategoryrequirements>.

For most procurements, the ordering activity's CO can make a scope determination by following steps 1 and 2 above. However, if additional information is needed, the CO may contact GSA for further assistance at maspmo@gsa.gov.

Services Not Allowed on Schedule Task Orders

Schedule task orders shall not include any of the following:

- ❖ Inherently governmental functions – see the prohibition at FAR Subpart 7.503(a)
- ❖ Personal services as defined in FAR Subpart 37.104(a)
- ❖ Architect-Engineering (A&E) services subject to the Brooks Act and FAR Part 36 procedures
- ❖ Construction – except: minor repair and alterations can be provided as ancillary under the MAS category ANCRA. Services provided under this SIN must be purchased in conjunction with items under the subcategories of Facilities Supplies, Facilities Solutions, Facilities Services, Furniture Services, Machinery and Components, Industrial Products, Structures, and Logistical Services. Ancillary Repair and Alteration services provided under this SIN must be ancillary to products or services purchased under one or more of nine subcategories and are not permitted to supplement products or services provided under the remaining subcategories.
- ❖ Services for any remediation, transportation, or disposal of radioactive waste, asbestos, and/or paint abatement or radon mitigation.

Accessing Schedule Contracts Terms and Conditions

The best and easiest way to review Schedule terms and conditions is to access the current MAS solicitation through beta.sam.gov. Go to www.gsa.gov/mascategoryrequirements and click the link for the "Multiple Award Schedule," which will link to beta.sam.gov. Be sure to review both the base solicitation and the category attachment.

Ordering Procedures for Schedule Orders

Ordering procedures for GSA Schedule contracts are prescribed at FAR Subpart 8.4. It is imperative that ordering activities follow these procedures and do not mix FAR 13 or FAR 15 procedures. **FAR Part 15 does not apply to Schedules orders.**

The following FAR parts apply to Schedule orders:

- FAR Part 7, Acquisition Planning
- FAR Part 10, Market Research
- FAR Subpart 33.1, Protests
- FAR Subpart 17.5, Interagency Acquisitions (for orders exceeding \$550,000)
- FAR Subpart 37.6, Performance Based Acquisition

The following FAR Parts **DO NOT** apply to Schedule orders:

- FAR Part 5, Publicizing Contract Actions
- FAR Part 6, Competition Requirements
- FAR Part 13, Simplified Acquisition Procedures, except 13.303-2(3)(c)
- FAR Part 14, Sealed Bidding
- FAR Part 15, Contracting by Negotiation
- FAR Part 19, Small Business Programs, except 19.102(b)(3) and 19.202-1(e)(1)(iii)
- FAR Part 36, Construction and Architect-Engineering Contracts

The Ordering Process

Step 1: Plan the Acquisition with an MAS contract

Orders against the GSA Multiple Award Schedule are not exempt from acquisition planning as prescribed in FAR Part 7.

The complexity and circumstances of each acquisition should determine the level of detail of the market research. You are encouraged to submit Requests for Information (RFI), draft solicitations, and other documents to Schedule contract holders as part of your market research efforts.

Using GSA eBuy for market research: GSA's online Request for Quotation (RFQ)/Request for Information (RFI) platform, eBuy, is an excellent tool for conducting market research. Ordering activities may use eBuy to issue an RFI to all prospective Schedule contract holders. Ordering activities are encouraged to register for and use eBuy at www.ebuy.gsa.gov.

Generally, for orders placed against Schedule contracts, the contracting officer shall follow the ordering procedures at FAR Subpart 8.4. Unless an authorized exception applies, fair-opportunity procedures prescribed for the dollar value of the order must be followed. When the OCO plans to award an order based on an exception to fair opportunity, a Limited Sources Justification (LSJ) must be prepared and approved as part of the planning process. All required notices and postings must also be issued. Refer to FAR 8.405-6 – Limited Sources.

Order-Level Contract Types

Subject to FAR and agency-level required consideration criteria, limitations, and/or prohibitions, you may use any appropriate contract type within an order against a Schedule contract **except cost reimbursement**. Appropriate Schedule order contract types include:

- ❖ Firm-Fixed-Price (FFP)
- ❖ Time-and-Materials (T&M)
- ❖ Labor-Hour
- ❖ Hybrids of any of these types, e.g., FFP with T&M Contract Line Item Numbers (CLINs)

Assign a NAICS Code to Each Order

The OCO must assign a North American Industry Classification System (NAICS) code to each task order solicitation.

The NAICS code assigned should reflect the principal nature of the work required under the task order and must come from the available NAICS codes awarded on the GSA Schedule contract. NAICS codes not represented on the Schedule contract may not be used at the order level.

GSA's MAS Program uses special item numbers (SINs) to delineate discrete categories under the 83 subcategories that make up the Schedule. These SINs are NAICS based and assist the ordering activity in applying the proper NAICS code for the order. e.g. The SIN for general engineering services is 541330ENG and the NAICS is 541330.

Caution: In accordance with regulations, contracting professionals must select the NAICS code for the order based upon the preponderance of work to be performed.

Size Standard Representations

Orders placed against Schedule contracts may be credited toward the ordering activity's small-business goals. For purposes of reporting an order placed with a small-business Schedule contractor, an ordering agency may only take credit if the awardee meets a size standard that corresponds to the work performed.

Important: Ordering activities should rely on the small-business-size representations made by Schedule contractors at the Schedule-contract level. These representations and certifications are maintained by the GSA CO and the site of record is GSA eLibrary. OCOs should not rely on the System for Award Management (SAM) for the size standard of a Schedule contractor for an individual order. Schedule contractors certify at the time of the initial offer for the Schedule contract and the size standard is valid for five years. The size standard reflected in GSA eLibrary is the official size standard for all orders placed against the Schedule contract.

However, agencies may request a size-standard re-certification at the order-level or BPA-level, at their discretion.

Small Business Evaluation Factors

Ordering activities may consider socioeconomic status when identifying contractors for consideration or competition for award of an order or Blanket Purchase Agreement (BPA) – (see FAR 8.405-3). At a minimum, ordering activities should consider, if available, at least one small business, veteran-owned small business, service disabled veteran-owned small business, HUBZone small business, women-owned small business, or small disadvantaged business Schedule contractor(s). GSAAdvantage!® (www.gsaadvantage.gov) and eLibrary (www.gsaelibrary.gsa.gov) contain information on the small-business representations of Schedule contractors.

Order Level Materials

Order-Level Materials (OLM) OLMs are supplies and/or services acquired in direct support of an individual task or delivery order placed against a Schedule contract or BPA. OLM pricing is not established at the Schedule contract or BPA level, but at the order level. Since OLMs are identified and acquired at the order level, the ordering contracting officer (OCO) is responsible for making a fair and reasonable price determination for all OLMs.

OLMs are procured under a special ordering procedure that simplifies the process for acquiring supplies and services necessary to support individual task or delivery orders placed against a Schedule contract or BPA. Using this new procedure, ancillary supplies and services not known at the time of the Schedule award may be included and priced at the order level.

OLM SIN-Level Requirements/Ordering Instructions:

- ❖ OLMs are:
 - ◆ Purchased under the authority of the FSS Program
 - ◆ Unknown until an order is placed
 - ◆ Defined and priced at the ordering activity level in accordance with GSAR clause 552.238-115 Special Ordering Procedures for the Acquisition of Order-Level Materials. (Price analysis for OLMs is not conducted when awarding the FSS contract or FSS BPA; therefore, GSAR 538.270 and 538.271 do not apply to OLMs)
 - ◆ Only authorized for use in direct support of another awarded SIN
 - ◆ Only authorized for inclusion at the order level under a Time-and-Materials (T&M) or Labor-Hour (LH) Contract Line Item Number (CLIN)
 - ◆ Subject to a Not To Exceed (NTE) ceiling price

For more information see www.gsa.gov/olm.

Order Funding and Funding Limitations

All orders made against Schedule contracts must be funded by the agency requiring and requesting the supplies or services. Orders placed under Schedule contracts may not be used to circumvent conditions and limitations imposed on the use of funds. Funds management and administration are the responsibility of the ordering activity. The ordering activity determines if the type of funds being used is appropriate for the order commodity or service being acquired.

Security Clearance Considerations

The order solicitation should clearly express all requirements for security clearances, both facility and personnel. These requirements must be prescribed and administered at the task-order level.

Order Period of Performance

The period of performance (POP) for each order awarded under a Schedule contract shall be specified in the order when it is initially awarded by the ordering activity. Orders must be solicited and awarded prior to the Schedule-contract POP expiration.

Options on Schedule Orders

MAS contracts include the standard FAR clause 52.216-22, Indefinite Quantity, to allow ordering activities and MAS contractors to continue orders up to 60 months after the base MAS contract has expired, including exercising options.

In accordance with the requirements of FAR 17.207, Exercise of Options, Options may be included on orders placed against Schedule contracts, provided that the options are clearly stated in the requirement and are evaluated as part of the ordering activity's "best value" determination.

Such options may be exercised provided that:

- ❖ Funds are available
- ❖ The requirement covered by the option fulfills an existing government need
- ❖ Before exercising an option, you ensure that it is still in the government's best interest, i.e., the option is the most advantageous method of fulfilling the government's need, with price and other factors considered
- ❖ The term for each order placed under the Schedule contract is specified in the order. Under no circumstances may an order be placed under the Schedule contract if the Schedule contract has expired or if the government has terminated or cancelled it.
- ❖ Pricing on an order, including options, does not exceed pricing on the Schedule contract. Pricing for any order, including options, must be in place before the award of any order including those extending beyond the Schedule contract ordering period

Option to Extend Services

The ordering activity must include the clause at FAR 52.217-8, Option to Extend Services, at the order level if it anticipates that it will be needed for that order.

Maximum Order Limitations

There is no maximum-per-order limitation under Schedule contracts. At the Schedule-contract level, GSA uses the term "maximum order threshold (MOT)" for contract-management purposes. Additionally, contractors have the right to refuse any order exceeding the MOT. However, this is simply a threshold for contract administration purposes and does not constitute a maximum order limitation.

Service Contract Labor Standards (SCLS)

Schedule contracts contain both SCLS and non-SCLS labor categories. Bona-fide executive, administrative, and professional labor categories are exempt from the SCLS. GSA has applied the SCLS at the Schedule-contract level where applicable.

OCOs may order, as ancillary support, any labor typically found in the Department of Labor's "Service Contract Act Directory of Occupations" if this labor is deemed necessary to deliver a total mission solution integrated across professional disciplines and/or the enterprise. In this situation, it is the responsibility of the OCO to ensure the SCA is properly applied and administered to any non-Schedule labor categories.

Rights Reserved by the GSA Procuring Contracting Officer (PCO)

Only the GSA Schedule PCO is authorized to modify the Schedule contract terms and conditions. Ordering activities may include their own local terms and conditions in their orders if they do not conflict with the basic terms and conditions set forth by GSA in the Schedule contract.

IMPORTANT: LABOR CATEGORY REQUIREMENTS

The ordering activity may NOT allow deviations to labor category descriptions and requirements at the order level. Any deviation from labor category requirements and qualifications (e.g. experience and education) by the selling contractor may result in unqualified labor and may be subject to the False Claims Act, which could result in both civil and criminal penalties.

Other Significant Planning Considerations

Other key considerations to address in developing your acquisition plan and preparing for an order solicitation include:

- ❖ The Economy Act does not apply to Schedule orders; GSA is specifically authorized by law to purchase supplies and *non-personal* services on behalf of other agencies. No documentation is required unless mandated by ordering agency policy (see FAR 17-502-2(b)).
- ❖ The requirements official should provide the OCO with a written determination that *inherently governmental functions* are not included in the scope.
- ❖ Personal services are not authorized on Schedule contracts.
- ❖ Commerciality determination is made by GSA, but may also be required at the order level, based on agency policy.
- ❖ Performance-based contracting methods are preferred.
- ❖ Identifying and evaluating potential organizational conflicts of interest (OCIs).
- ❖ Preparation of the Quality Assurance Surveillance Plan and identification of performance metrics, as applicable.
- ❖ Evaluation factors and methodology.

Cancellation of Solicitations

Cancellation of an order-level Request for Quotation (RFQ) is at the discretion of the OCO. It is a good practice for the OCO to document the cancellation decision rationale and communicate the rationale with the affected Schedule contractors.

Step 2: Define the Requirements and Develop the Solicitation

Requirements-Development Support Resources

Agencies have access to a considerable array of support resources during the requirements development phase, such as

- ❖ Sample SOWs/PWSs at www.gsa.gov/sowlibrary
- ❖ Contract terms and conditions at www.gsaelibrary.gsa.gov
- ❖ OMB guidance on structuring contracts, including
 - ◆ Increasing competition
 - ◆ Using Performance-Based Service Acquisition (PBSA) and commercial solutions
 - ◆ Selecting the best contract type
 - ◆ Mitigating risk on T&M/Labor-Hour types
 - ◆ Using incentives effectively
 - ◆ Transitioning to lower-risk contract types¹
- ❖ Best practices postings at interact.gsa.gov
- ❖ Schedule Services Pricing Tool (Contract-Awarded Labor Category [CALC]) at calc.gsa.gov

¹OMB Memorandum to CAOs and SPEs, October 27, 2009; https://www.whitehouse.gov/sites/whitehouse.gov/files/omb/assets/procurement_gov_contracting/increasing_competition_10272009.pdf

Developing the Solicitation

Use the solicitation form and format for task and delivery orders normally prescribed and used by your agency for task/delivery order solicitations, consistent with FAR 8.4 procedures. Keep in mind that FAR 15 guidelines do not apply to orders placed against Schedule contracts.

Note: Use of the Uniform Contract Format found at FAR 15.2 is not required for Schedule orders. Furthermore, it is not recommended for use for Schedule orders, because it can lead to confusion between the ordering procedures found in FAR 8.4 versus the source selection procedures found in FAR 15.3, which are not applicable to Schedule orders.

Evaluation Factors

The procedures in FAR Subpart 15.3 (Source Selection) **do not** apply to the Schedule ordering process (see FAR 8.404(a)).

Ordering activities must establish their own evaluation factors at the order level.

The order solicitation and award process should be as streamlined as practical to reduce solicitation and proposal preparation costs and time for both the government and contractor.

Step 3: Issue the Solicitation

Methods of Issuing the Order Solicitation

A Request for Quotation (RFQ) against a GSA Schedule contract can be issued:

- ❖ By posting the notice on GSA's eBuy at <http://www.ebuy.gsa.gov>
- ❖ By contacting Schedule contractors directly via email, phone, etc., as long as adequate competition requirements are met
- ❖ Through the ordering agency's preferred method, e.g., agency website, databases, contracting software, etc.

The use of any one of the preceding mediums to broadcast an RFQ notice to *as many contractors as practicable* satisfies the "fair opportunity" notification requirement.

The beta.sam.gov website shall **not** be used for Schedule order-level solicitations (see FAR 8.404(a)).

Step 4: Evaluate Quotes

OCOs should evaluate proposals based on the methodology stated in the order solicitation to maintain fairness in the ordering process and mitigate protest risk.

Prices

GSA Schedule contract prices have been determined to be fair and reasonable (see FAR 8.404(d)). Pricing at the order level should be evaluated to ensure that the quoted price does not exceed the awarded price on the Schedule contract and to determine if discounts have been offered.

Overall price reasonableness determination for services: The ordering activity is responsible for considering the level of effort and the mix of labor proposed to perform a specific task being ordered, and for determining that the total price is reasonable (see FAR 8.405-2(d)).

Cost-reimbursement Type Orders

FAR 12.207 only allows for Firm-Fixed-Price, Time-and-Materials, and Labor-Hour contract types under commercial contracts, therefore cost-reimbursement orders are not allowed under the MAS Program. Only Firm-Fixed-Price, Time-and-Materials, and Labor-Hour orders may be awarded. See FAR 8.404(h).

EEO Clearance

The GSA Contracting Officer complies with the EEO clearance procedures at FAR 22.805, when the contract value is estimated to be greater than \$10M. The Ordering Contracting Officer must contact the GSA CO to determine whether or not the EEO clearance has been completed for a specific contract. If it has not been done, the OCO should ask the GSA CO to complete the clearance based on the value of the anticipated order.

Step 5: Award the Task Order

Order Award Documentation

Document your awards in accordance with regulations and local policy.

Schedule order documentation includes:

Minimum Documentation Requirements – FAR 8.405-1(g) Products	
Schedule contracts considered, noting the awardee	✓
Description of the supply purchased	✓
Price	✓
Limited Source Justification, if applicable (See 8.405-6)	✓
When the order exceeds the SAT, evidence of compliance with the ordering procedures at 8.405-1(d)	✓
<i>The basis for the award decision should include the evaluation methodology used in selecting the contractor, the rationale for any tradeoffs in making the selection, and a price reasonableness determination for services requiring an SOW.</i>	✓

Minimum Documentation Requirements – FAR 8.405-2(f) Services	
Schedule contracts considered, noting the awardee	✓
Description of the service purchased	✓
Price	✓
The evaluation methodology used in selecting the contractor to receive the order	✓
The rationale for any tradeoffs in making the selection	✓
The price reasonableness determination required by paragraph (d) of this FAR subsection	✓
The rationale for using other than a Firm-Fixed-Price order or a performance-based order	✓
<i>When an order exceeds the simplified acquisition threshold, the ordering contracting officer must document the file with evidence of compliance with the ordering procedures at 8.405-2(c).</i>	✓

Minimum BPA Documentation Requirements – FAR 8.405-3(a)(7)	
Schedule contracts considered, noting the awardee	✓
Description of the supply or service purchased	✓
Price	✓
Limited Source Justification, if applicable (see 8.405-6)	✓
Justification for Single-Award BPA, if applicable	✓
Determination for a single-award BPA exceeding \$103 million, if applicable	✓
Documentation supporting the decision for multiple or single award BPAs	✓
Evidence of compliance with competitive procedures – See 8.405-3(b)	✓
<i>The basis for the award decision should include the evaluation methodology used in selecting the contractor, the rationale for any tradeoffs in making the selection, and a price reasonableness determination for services requiring an SOW.</i>	✓

Use of Limited Sources Justification

Schedule orders may be awarded on a sole-source or brand-name basis as required by the ordering activity. Such orders must have an approved Limited Sources Justification (LSJ – see FAR 8.405-6 for procedures), and the OCO must post the required public notice within 14 days after placing the order. This posting requirement includes posting the approved LSJ at the government point of entry at beta.sam.gov for a minimum of 30 days (see FAR 8.405-6(a)(2)). FAR part 6 does not apply to LSJs under MAS.

Order-Level Protests

All protests at the order-level are handled by the ordering activity. FAR Subpart 33.1 is applicable to orders of any dollar amount under Schedules. Protests may be filed with GAO or the ordering activity. Protest risks include:

- ❖ Mixing procedures from FAR Parts 13/15 with FAR Subpart 8.4 procedures
- ❖ Scope issues, i.e., placing orders under the wrong Schedule sub-category
- ❖ Not following the ordering procedures in FAR Subpart 8.4
- ❖ Not following evaluation procedures as stated in the ordering activity's solicitation

Step 6: Administer the Order / Execute the Work / Close Out the Order

Quality Assurance – Contractor Surveillance

The OCO is responsible for ensuring contractor performance meets the minimum requirements established in the order, documenting the order file and communicating with the contractor to ensure the government is receiving the contracted services.

Monitoring contractor performance should be delegated to a properly trained and certified COR. The specific authority/limitations of the COR should be delineated in an appointment letter from the OCO, a copy of which should be provided to the contractor.

Subcontracting and Limitations on Subcontracting

Subcontracting may be used under Schedules at the discretion of the OCO. However, FAR Clause 52.219-14 – *Limitations on Subcontracting* applies to all contracts or orders that have been set-aside or reserved for small business or 8(a) concerns, including orders under the GSA MAS Program. For a prime/subcontractor structure, the small-business prime must perform at least 50 percent of the value of the work to meet the limitations on subcontracting requirements.

Performance Evaluation

Each OCO is responsible for ensuring that the contractors' performance on each order exceeding the Simplified Acquisition Threshold is reported in CPARS in accordance with the policies in FAR Subpart 42.15. Follow agency procedures for preparation, review, and submission of performance reports. GSA will consider order performance information as part of performance evaluations at the master indefinite-delivery/indefinite-quantity (IDIQ) contract level.

Order Closeout

Order files shall be closed out in accordance with the policies in FAR Subpart 4.804-1, or, if the order is administered by another office, FAR Subpart 4.804-2 applies. The procedures prescribed at FAR Subpart 4.804-5 shall be used except when it is appropriate to use the quick closeout procedures at FAR Subpart 42.708.

Appendix A: Contract File Checklist

GSA Schedule Order: Contract File Checklist

This checklist may be used for the award of task or delivery orders against General Services Administration (GSA) Federal Supply Schedule (FSS) contracts (also referred to as “Multiple Award Schedule,” “GSA Schedule,” or “GSA MAS” contracts) and the establishment of Blanket Purchase Agreements (BPAs) against GSA FSS contracts.

Note 1: Additional agency-level and/or local requirements may apply and should be followed in addition to the items identified below.

Note 2: All items listed below will not apply to every order. This is a comprehensive checklist and should be used at the Contracting Officer’s discretion. It is recommended that an “N/A” be placed to the left of items that do not apply at the individual-order level.

Note 3: The Economy Act does not apply to orders placed against GSA Schedules (see FAR 17.502-2(b)).

Note 4: Procedures in FAR 15 do not apply to orders placed against GSA Schedules, except DOD activities – see class deviation on determination of fair and reasonable pricing.

<http://www.acq.osd.mil/dpap/policy/policyvault/USA001004-14-DPAP.pdf>

GSA Schedule Contract Number:
Contractor Name:
Contractor Point-of-Contact Information: [Insert name] [Insert address] [Insert email address] [Insert telephone number]
Delivery/Task Order or BPA Number:
Award Date:
Base Period of Performance (excluding options):
Period of Performance (including options):

Tab Section/Tasks	Complete	Date
Tab A – Award Documents		
Signed original task or delivery order		
Signed original modifications		
Tab B – Pre-solicitation		
Acquisition Requirements Package (check each sub-task below):		
❖ Acquisition strategy		
❖ Acquisition plan (AP – See FAR 8.404(c)(1), FAR Subpart 7.1.)		
❖ Independent Government Estimate (IGE)		
❖ Description of the supplies or services (e.g., Performance Work Statement)		
❖ Funding document		
❖ Other acquisition request document(s) _____		
Market research documentation (See FAR 10.002(e).)		
Information technology (IT) acquisition strategy (See FAR 8.404(c)(1); FAR 39.101(b)(2).)		
Limited Source Justification (See FAR 8.405-6.)		
Procedures for placing orders under Blanket Purchase Agreements (BPAs) (See FAR 8.405-3(a)(3).)		
Small Business Review Form (e.g., DD Form 2579) (See FAR 7.104(d), FAR 8.405-5.)		
Certifications for assisted or direct acquisitions by a non-DOD agency, if applicable		
Other _____		
Tab C – Determinations and Pre-solicitation Clearances		
SAM Exclusions, www.sam.gov (See FAR 9.405(b).)		
Documentation for use of other than firm fixed price		
Use and evaluation of options (See FAR Subpart 17.2.)		
Non-personal services (See FAR 37.103(a).)		
Use of government-furnished property, equipment, or information (See FAR Subpart 45.3.)		
Service Contract requirements (See FAR 37.103, DFARS 237.170-1.)		
IT clearance (See FAR Part 39.)		
Acquisition of printing and other related supplies (See FAR Subpart 8.8.)		
Other _____		

Tab Section/Tasks	Complete	Date
Tab D – Solicitation/Ordering Procedure		
Request for quotation and amendments (See FAR 8.405-1(c)(2); 8.405-2(c).)		
Rating/evaluation plan		
GSA eBuy posting (See FAR 8.405-1(c)(2); 8.405-2(c).)		
List of Federal Supply Schedule (FSS) contractors surveyed and their prices quoted (See FAR 8.405-1(c)(1).)		
Solicitation correspondence		
Other _____		
Tab E – Technical Evaluation		
Signed technical evaluation score sheets/report (See FAR 8.405-2(d).)		
Conflict of interest/confidentiality forms for reviewers (See FAR 3.104.)		
Other _____		
Tab F – Successful Quotation		
Successful respondent's original/final technical and price quotation (See FAR 4.803.)		
Approved Pricing Schedule/Table ²		
All products/services awarded are offered under a GSA awarded SIN on the Schedule contract		
Other _____		
Tab G – Price Evaluations/Reductions		
Evaluation-team analysis of contractor's price/technical quotation		
Record of price reductions and discounts sought/obtained (See FAR 8.404(d); 8.405-1(d); 8.405-2(c)(3); 8.405-4.)		
Questions and responses, including record of oral discussions (See FAR 4.803.)		
Price evaluation/best value analysis and award decision documentation (See FAR 8.405-1(c)(3); 8.405-1(e). For DOD activities, determination of fair and reasonable pricing is required; IAW DOD Class Deviation to FAR 8.404(d) issued on March 13, 2014.)		
Determination to use a T&M or Labor-Hour task order (See FAR 8.405-2(e).)		
Other _____		

²Approved price list may be a screenshot from GSAAdvantage![®] for products or other pricing list provided by contractor and verified through GSAAdvantage!. For services, the approved labor rates should come from the pricelist posted in GSA eLibrary in the contractor's terms and conditions file (found on the contractor detail page).

Tab Section/Tasks	Complete	Date
Tab H – Pre-award Documentation, Funding, and Clearances		
SAM exclusions (See FAR 9.405(d)(4).)		
Funding document (e.g., requisition)		
Internal/other file review		
Data entry in FPDS (See FAR 4.602.)		
GSA Schedule Contractor Team Agreement		
COR certification of training		
COR designation memorandum (See FAR 7.104(e).)		
Other _____		
Tab I – Notices, Reports, Debriefings, and Protests		
Award notification to unsuccessful respondents (See FAR 8.405-2(d).)		
Feedback documentation (See FAR 8.405-2(d).)		
Protest documentation, if applicable (See FAR 33.103; 33.104.)		
Award transmittal letter(s)		
Other _____		
Tab J – Task Order Administration		
Post-award orientation (See FAR Subpart 42.5.)		
Annual reviews for BPAs (See FAR 8.405-3(e).)		
Post-award correspondences		
Tab K – Task Order Closeout		
Final reports including certification from COR		
Notification letter to contractor		
Final invoice/voucher (marked final)		
Final Past Performance Evaluation Report		
Data entry in the Federal Procurement Data System (FPDS)		

Appendix B: Schedule Tools Available to the OCO

GSA eLibrary: the source for the latest GSA contract award information. www.gsaelibrary.gsa.gov

GSA eBuy: an electronic Request for Quotation (RFQ) system designed to allow government buyers to request information, find sources, and prepare RFQs online for the myriad of services and products offered through GSA's Multiple Award Schedule (MAS) Program. Government buyers can use eBuy to obtain quotes or proposals for services, large-quantity purchases, and purchases with complex requirements. www.ebuy.gsa.gov

GSA Advantage!®: the online shopping portal for Schedule products. www.gsaadvantage.gov

MAS Desk Reference: www.gsa.gov/masdeskreference

Training:

- ❖ Training resources may be viewed at www.gsa.gov/govtraining.
- ❖ Webinars on Schedule topics are conducted monthly. The schedule for upcoming webinars is posted at www.gsa.gov/events.
- ❖ DAU Continuous Learning Modules: GSA has posted continuous learning modules on the DAU portal at <https://icatalog.dau.edu/onlinecatalog/tabnavcl.aspx?tab=FAC>. GSA modules have "GSA" in the title.



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