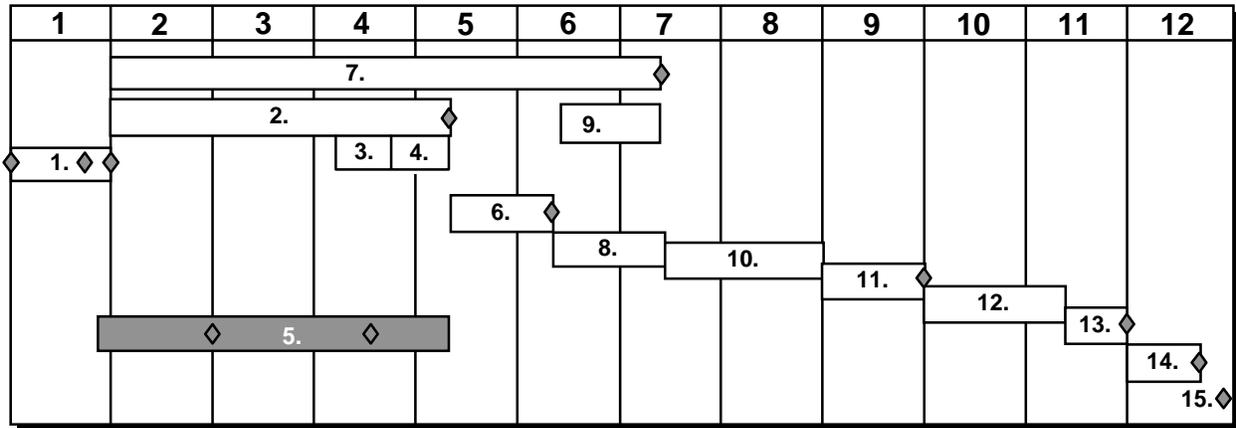


STEP 5: CONDUCT PRESOLICITATION ACTIONS

5.1 OVERVIEW



◆ Major Milestone Event

The purpose of Step 5 is to complete those actions necessary to lay the groundwork for the preparation of the solicitation. All activities are focused on supporting development of a quality solicitation. This step has two components. In the first, the CA team gathers data by performing informal market research; the second consists of the traditional presolicitation activities.

Market Research

One method for carrying out the informal market research is to conduct discussions with potential offerors and industry experts. During these discussions, the government can learn from industry experts how the function under study is actually performed and contracted for in the private sector. This process is intended to determine what new techniques, successful endeavors, and emerging trends exist and which of these processes or procedures can be included in the PWS and the Management Plan. Another method of market research is to conduct literature and Internet searches. The

purpose of the informal market research is to develop a detailed description of the function under study, including the means and methods of measuring performance. The objective of this data gathering is to prepare for the presolicitation meeting and ensuing solicitation.

The information learned can then be used in Step 2 and Step 7. In Step 2, this information can be applied to the development of the performance standards, the PWS itself, the QASP, and the other aspects of the solicitation. During the development of the Management Plan (Step 7), the information learned from private industry during Step 5 may be useful in developing new operating procedures that will improve the quality and efficiency with which the commercial activities are performed.

Presolicitation Announcement

Following the completion of the informal market research, the more formal actions of the solicitation are performed. These formal actions begin with the publishing of an announcement in the *Commerce Business Daily* notifying private industry that the government is seeking to identify vendors who have the capability and interest in performing services that are the subject of the procurement. The CA team leader coordinates with the contracting officer and the contracting officer publishes the announcement. Once this formal component of the solicitation process begins, the constraints on the procurement process contained in the Federal Acquisition Regulations (FAR) apply.

CO Tip: The *Commerce Business Daily* announcements are major milestones.

The CA team leader continues to coordinate with the contracting officer in preparation for the presolicitation meeting. Part of this coordination effort entails preparing a letter inviting prospective offerors to the presolicitation meeting. Next, the CA team leader prepares the briefing for the presolicitation meeting. The briefing will include a discussion of all pertinent information related to the activity under study (see Template 5.4.1). During this meeting, private industry will be provided an opportunity to comment on the proposed solicitation. Industry comments may be provided verbally during the meeting or in writing afterwards. Attendees should be advised that presolicitation information they provide is for government use and may or may not be used in the ensuing solicitation. The CA team will then analyze industry inputs for incorporation into the relevant portions of the solicitation.

Solicitation Announcement

A second *Commerce Business Daily* announcement is made in this step to announce the solicitation (Step 6). This second amendment provides an opportunity for all interested private firms to let the Contracting Officer know they may be interested in proposing on the work and to place their firm on the bidders list.

5.2 ROLES AND RESPONSIBILITIES

Key Players

- **CA Team/Team Leader**
Conducts preliminary data gathering and market research of private industry performance standards (benchmarking) and contracting practices. Uses this preliminary data in preparing for presolicitation meeting. Organizes and conducts presolicitation meeting to gather industry input. Leads analysis of industry input for incorporation into the solicitation
- **Contracting Officer.** Provides support to CA team leader regarding guidelines for industry interactions and contacts.

Advisory Players

- **Legal Counsel.** Ensures compliance with FAR requirements concerning the identification and notification of prospective offerors about the impending solicitation.
- **Union Representative.** May participate in presolicitation meeting to provide feedback to affected employees.

5.3 CHECKLISTS FOR KEY PLAYERS

- CA Team Leader

1. Coordinates *Commerce Business Daily* announcements with contracting officer
 2. Conducts preliminary data gathering
 3. Prepares briefing for presolicitation meeting
 4. Conducts presolicitation meeting
 5. Records and analyzes results of presolicitation meeting
 6. Incorporates appropriate industry inputs into solicitation
- Contracting Officer
1. Discusses ground rules for industry contacts with CA team
 2. Issues *Commerce Business Daily* announcements
 3. Compiles list of sources responding to *Commerce Business Daily* announcements
 4. Sends letter inviting industry sources to presolicitation meeting
 5. Participates in presolicitation meeting in advisory role

5.4 TASK TEMPLATES

The objective of presolicitation briefing is to describe to potential offerors the function under consideration.

Template 5.4.1: Presolicitation Briefing

The briefing should include a discussion of the following:

- Objective of the briefing—to solicit industry opinion concerning how this function is performed in the private sector and what are some measures of performance for this function used in the private sector.
- CA team
- Scope of the effort—a description of the function to be studied. If necessary, a flow diagram of the process that will clearly show the start and stop points.
- Profile of the fleet
- Workload summary
- Performance measures
- Unique features and/or requirements
- Solicitation methodology
- Industry comments.

The CA team leader should be prepared to collect and record information provided by the participants. The CA team leader should focus on capturing the alternative methods and means used by industry to perform this function and to measure performance for this function. The objective is to capture industry facts and views. Under most circumstances, the CA team leader is the senior manager at this briefing. However, studies involving sizable or critical functions may require Commanding Officer participation.

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