



Ordering Instructions

Federal Strategic Sourcing Initiative
Print Management
Blanket Purchase Agreement(s)

Conceptual Overview of Print Management

GSA has developed the following ordering guide for use of the multiple-award Federal Strategic Sourcing Initiative Print Management Blanket Purchasing Agreements.

1.0 Understanding Print Management

"Print Management" is defined, for the purposes of the Print Management Program Office, as a deliberative process of measuring and analyzing the way imaging output occurs within an organization and connecting data to an acquisition strategy designed to yield measurable organizational benefits.

Generation I has been organized with three over-arching strategic objectives:

- Provide tools to lower the total cost of ownership (TCO) for imaging output devices
- Offer agencies the most innovative technology designed to meet sustainability goals mandated by Executive Orders 13423 and 13514
- Gain transparency into government spending which will be enabled by the reporting aspects of this acquisition

The goals of the first generation solution are to increase transparency of TCO drivers and to begin lowering TCO across the federal government. Once the government has begun gaining control of its imaging fleets and the associated costs, it can begin to drive further reduction of those costs through additional managed services. Before an organization can gain control over fleet expenses and energy consumption, the organization must first discover where print is occurring, and how expensive that output has become. The initial stage of discovering where costs are occurring in order to control resources more effectively is termed "fleet assessment".

The BPA is divided into two distinct award areas termed "functional areas" designed to separate recommendations for devices (Fleet Assessment) from the procurement of devices (Device Plus). The Functional Area BPA awards are mutually exclusive. A contractor selected for Functional Area I, Fleet Assessment, cannot be selected for Functional Area II, Device Plus, and cannot perform work under a partnership or sub-contracting agreement with a contractor in Functional Area II, and vice versa.

The **fleet assessment phase** measures and describes hardware, software, network capabilities, imaging output, imaging costs, procurement duplication, business needs, and any other organizational inefficiencies that may inhibit optimization. The initial data collection and analytical work occurring in the fleet assessment phase informs the client. With information, clients are empowered to create more accurate business cases, requirements documents, and government estimates for new device procurement.

The **Device Plus** solution offered under Functional Area II, Contract Line Item (CLIN) 2 and (CLIN) 3 offers the lowest evaluated life-cycle costs for a federal agency seeking to procure new multifunction devices (MFD) and single function Network Printers (NPs). The **Driving Environmental Sustainability** offering under CLIN 4 offers devices that meet federal government requirements for technical specifications and performance while also representing advanced technology in energy efficiency, greenhouse gas emission reduction, and use of recycled and reused materials.

2.0 Understanding Functional Area I: Fleet Assessment

Functional Area I (FA I) is comprised of firm fixed labor hour rates for a wide range of assessment and analysis activities. Some specializations in this area include:

- Historical analysis of fleet costs
- Establishment of cost baselines
- Discovery of networked and non-networked devices
- On-going data collection and analysis
- Recommendations for asset rationalization and re-deployment
- Recommendations for optimization
- Functional device recommendations based on work flow and business needs
- Recommendations for improving workflow, security, and energy efficiency

The scope of services awarded under (FA I) must be defined in depth by the Ordering Official in a Statement of Work, Performance Work Statement, or Statement of Objectives. Contracting Officers should clearly define stated outcomes or work required to meet a set of deliverables for a specific organizational unit. Contracting Officers are encouraged to perform market research using information supplied by contractors issued FA I BPAs.

3.0 Understanding Functional Area II: Device Plus

Device Plus award pools that represent the lowest total cost of ownership (TCO) have been established by the FSSI Print Management Office. The evaluated TCO includes device price, service and consumables, and a calculation of the cost to operate the device.

Functional Area II (FA II) is an award pool of qualified MFD or single function Network Printers within defined volume bands designed to rationalize the device speed and capacity selections available in the market. The devices awarded under Functional Area II are packaged with consumables (excluding paper) and maintenance agreements/extended warranties. The purpose of bundling all life-cycle cost drivers into one award package is to allow the government to procure the cost of imaging output over time.

3.1 Defining Requirements/Using the Volume Bands

Ordering Activities should perform the following steps to ensure that requirements defined within the RFQ utilize the correct volume bands.

Step 1: Review data from legacy devices to determine actual output requirements

Step 2: Determine if changes in businesses processes will drive an increase or decrease in output volume for procured period of performance

Step 3: Develop an RFQ that specifically identifies the appropriate volume band for each organizational area

4.0 Sustainability Offerings

Ordering Activities searching for sustainable offerings may limit device offerings to CLIN 4, Driving Environmentally Sustainable Solutions. In addition to sustainable devices, CLIN 4 features sustainable consumable packages. Ordering Activities are encouraged to visit the FSSI Print Management web portal, www.strategicsourcing.gov, for additional information.

Devices available under this CLIN represent the most earth-friendly innovative technologies. These are designated with the following symbol:



5.0 Customizable Solutions

CLINs 2 through 4 also offer prices for devices that can be procured without additional life-cycle costs such as consumables and/or maintenance included. Ordering Activities who elect to procure devices alone must notify the GSA FSSI PMO at print.management@gsa.gov that the "Device Only" option has been selected. Ordering Activities using the Customizable Solutions portion of the BPA may be responsible for reporting all procurement costs to OMB.

Ordering Activities with requirements for short term use of MFDs and NPs are encouraged to use short-term rental agreements provided under this BPA. Short-term rental agreements do not include charges for consumables unless a consumables package is included in the rental agreement.

6.0 Understanding Per Unit Measurement Metrics

Prices for the Blanket Purchase Agreements have been evaluated on a cost per copy (cpc) basis. The cost per copy measurement is a fully loaded unit of measurement that captures the cost of the device, total cost of services, cost of consumables, and cost of energy per impression, specifically excluding the cost of paper.

Devices awarded under the FSSI BPA are designed to achieve the lowest total cost to the Government given all cost factors over time, and given the unique technical, environmental, and security requirements of the federal government, but prices still vary based on each contractor's unique design.

Ordering Officials are encouraged to develop independent cost estimates that use fully-loaded CPC units of measurement when conducting acquisition planning. Ordering Activities should refer to the FSSI web portal for lists of prices for all supplies and services offered under the Print Management BPA.

7.0 Statement of Work/Performance Work Statement/Statement of Objectives Preparation

Orders under this BPA are subject to terms and conditions of the BPA and FAR Part 8.405-3, Blanket Purchase Agreements. Ordering Activities should determine when placing orders whether the regulations at 8.405-1 or 8.405-2 will govern the requirements.

BPA-level agreements with contractors establish minimum technical specifications and minimum service level requirements at firm-fixed labor hour rate and firm-fixed prices. The Ordering Official must develop work requirements at the Order level that meet individual agency security, performance, and IT requirements.

Ordering Activity Administrative Information

Ordering Officials should develop a written statement of work/performance work statement or statement of objectives with clearly defined deliverables used in accordance with FAR 8.405-1 and FAR 8.405-2. Standardized templates for specific Ordering Activities may be available. Contact the Print Management Program Office for more information.

The Ordering Official may request a level of service or a specific technical specification above and beyond what is established in the BPA. Price for additional levels of service or unique specifications are allowed, but must be within the scope of the Contractor's Multiple Award Schedule 36 and must not exceed prices established in the schedule contract.

Ordering Officials should utilize performance-based contracting methods to the maximum extent possible, including the development of specific performance standards and methods of quality surveillance.

8.0 Equipment Leasing

FAR Part 7.4 provides guidance to Ordering Officials attempting to determine whether to buy or lease devices. Ordering Officials should examine options and choose the most appropriate, given the needs of the agency. Each method presents advantages and disadvantages. FA II provides the following acquisition options for agencies: purchase, lease to own, operating lease, rental, cost per copy, and flat rate.

Device purchase is the least expensive acquisition method. However, funding for purchases is sometimes subject to additional regulations depending on the dollar value of the purchase. Circumstances may justify an acquisition through methods other than purchase.

Ordering Activities who wish to fund multiple year leases with annual operating appropriations are advised that in a multiple year contract, the full term of the lease must be funded OR the Ordering Activity must separately fund a termination liability fee that ensures the contractor in the event that the lease is terminated for the convenience of the government for a reason other than the unavailability of government funds prior to the lease's scheduled end.

A five year lease, funded with annual appropriations, will be divided into five, 12-month ordering periods. The full termination liability is calculated as percentage of the full lease cost and is reduced in twelve month increments over the period of the lease.

Ordering Activities should consider the terms of Schedule 36, Operating Lease and Lease To Ownership Plans (LTOP) SINs when placing orders. Ordering Agencies are responsible for the obligation of the funding consistent with fiscal law when entering into any lease arrangement, particularly with respect to long-term leasing arrangements and early termination liability fees. Particularly, agencies should consult Schedule 36, leasing terms, Leasing of General Purpose Commercial Equipment.

Ordering Activities are encouraged to perform acquisition planning and to consider obtaining approval for either capital funds for purchase or approval to enter into a multi- year contract as described in FAR Part 17. Particularly, Ordering Activities are encouraged to consider the authority under a multi-year contract to cancel a contract (FAR Part 17.106-1).

9.0 Veteran-Owned Small Business Preferences

Award preferences for service-disabled veteran-owned small businesses and small businesses have been made for FA I.

10.0 Competition

Normal competitive procedures require the Ordering Activity to issue an RFQ to an appropriate number of BPA holders in accordance with FAR Part 8.4 for orders exceeding the micropurchase threshold. Orders exceeding the simplified acquisition threshold must be posted in eBuy.

Ordering Activities will choose between one of the following options when competing an Order-level RFQ:

- Orders that require a Statement of Work must be made available to all BPA holders
- Orders that require a Statement of Work and have associated brand-name restrictions must be made available to all relevant BPA holders. A Limited Sources Justification must be posted in e-buy in accordance with FAR Part 8.405-6.
- Device-Only procurements conducted under the Customizable Solutions portion of the BPA that do not require a Statement of Work and are under the Simplified Acquisition Threshold require the Ordering Activity to review the prices of at least three BPA holders.
- Device-Only procurements conducted under the Customizable Solutions portion of the BPA that do not require a Statement of Work for any dollar amount may be conducted through reverse auctioning

There is no limitation in this BPA on open market items, however, Ordering Officials are advised that all open market items procured are subject to full and open competition procedures in FAR Part 8.402 (f), such as FAR Part 5, 6, 12, 13, and 19, etc. Ordering Officials are advised that any open market item procured ancillary to a BPA order is subject to all commercial item restrictions described in the FAR, such as the Buy American Act.

11.0 Post-Award Reporting Requirements

All Contracting Officers who use the FSSI BPA are responsible for reporting the date of award, the task order number, the award amount, and the contractor to the GSA FSSI Program Management Office (PMO) at print.management@gsa.gov within 10 days of task order award. Information submitted by the Ordering Activity will be cross-referenced with information provided by the contractors.

The GSA PMO will monitor the contractor's compliance with the initial and quarterly reporting requirements in Appendix C. Ordering Activities will be contacted by the FSSI Print Management PMO and asked to submit evaluations of contractor and sub-contracting performance.

12.0 Use of Past Performance Data in Evaluation

Contracting Officers are encouraged to inquire with the FSSI Print Management PMO regarding previous performance and subcontracting performance when evaluating Order level RFQ offers. The FSSI PMO will provide information to Ordering Activities on the percentage of goals and total sub-contracting goals achieved during the performance of previous Orders beginning December 2011.

Contracting Officers are encouraged to use the FSSI Print Management PMO data on sub-contracting performance as a non-price evaluation factor in best value competitions. The FSSI portal will publish subcontracting goals achieved for all large businesses beginning December 2011.

13.0 Service Level Agreements

Ordering Activities are encouraged to use a performance based approach in the form of a Quality Assurance Surveillance Plan (QASP) in order to ensure performance compliance with the Service Level Agreement (SLA) that has been established by the ordering activity. A sample QASP is provided below:

PERFORMANCE REQUIREMENTS	METHOD OF SURVEILLANCE	STANDARDS <i>(Numbers may be adjusted after real data is collected)</i>	INCENTIVE / DISINCENTIVE
<p>Performance Requirements are taken directly from tasks in the SOW</p> <p>Performance Requirement A: The contractor shall deliver 15 MFDs to location x no later than 4 weeks ARO</p>	<p>Identify the COR or COTR, the data that will be collected, how data will be collected, and how the data quality will be ensured</p> <p>COR will verify delivery</p>	<p>Describe standards in terms of quality, quantity, timeliness, and cost-effectiveness</p> <p>Met: Delivery date is on or before 4 weeks ARO</p> <p>Not Met: Delivery date is after 4 weeks ARO</p>	<p>The government may identify disincentives and incentives, or allow the contractor to propose disincentives and incentives. If incentives are proposed, the Contracting Officer must ensure that funds are available</p> <p>Disincentive: The Government will assess the full cost of work interruption or other collateral costs to the contractor</p>
<p>Performance Requirement B: The contractor shall provide break/fix support</p>	<p>COR will monitor reports of down machines</p>	<p>Each quarter, device fleets will be 95% operational 100% of the days when the government is open for business</p>	<p>Ordering Official should negotiate with Contractor</p>
<p>Performance Requirement C: The contractor shall report meter reads for data outlined in Appendix C in a timely and accurate manner</p>	<p>GSA FSSI PMO will collect random samples</p>	<p>100% of data will be entered 10 days after the end of the quarter with 98% accuracy</p>	<p>Ordering Official should negotiate with Contractor</p>

14.0 Remedies for Performance Failure

Ordering Officials are encouraged to identify delivery milestones, delivery instructions, and specific information regarding the specifications of the device to the maximum extent possible in the Order SOW. Remedies for performance failure range from taking corrective action through the assessment of disincentives under a Quality Assurance Surveillance Plan (QASP), to termination for cause using the procedures described in 8.405-6, Remedies for Non-Conformance. FAR Part 52.212-4, Contract Terms and Conditions, Commercial Items, is incorporated into every Schedule 36 contract against which the FSSI BPAs are placed.

If the Ordering Official encounters a performance failure, the Ordering Official may issue a cure letter with corrective action steps outlined. If the cure letter fails to remedy performance, the Ordering Official may issue a show cause letter. If the contractor fails to respond meaningfully to the show cause letter, the Ordering Official may proceed with a termination for cause, and award the Order to the contractor next in line for award during competition. The government may assess any costs associated with the termination against the contractor. Additionally, Ordering Officials are encouraged to document non-performance, slow performance, and poor customer service in government-wide past performance databases.

Process for Issuing a FSSI BPA Order RFQ

Step 1: Identify your procuring contracting office

Step 2: Develop requirements

Step 3: Issue RFQ in eBuy

Step 4: Report award to the FSSI PMO within 10 business days

Step 5: Perform contract administration and quality assurance activities

Contact Information

Print Management Office
GSA Federal Acquisition Service

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