

**Standard Operating Procedures
for the Use of Blanket Purchase Agreements (BPAs)
To Acquire CORE PLUS Program Services**

Vendors: Centre Consulting Inc. (BPA Award No.NBCA08001)
SRA International (BPA Award No. NBCA08002)

COTR: David Emmerson (CADR Office)

Type of Services Available:

Conflict Assessment	Conflict Coaching
Mediation	Organizational Development
Facilitation	Change Management
Ombuds	Training (including curriculum design)
CORE PLUS Program support	

Background:

The Office of Collaborative Action and Dispute Resolution (CADR) in the Office of the Secretary competed and awarded Blanket Purchase Agreements to support the operation of the Department's CORE PLUS program for managing conflict in the workplace. The BPAs are available for use by any DOI Bureau or Office to acquire a wide variety of conflict management and dispute resolution services to effectively resolve any type of workplace or employment related conflicts or disputes and improve the quality of work life throughout DOI. The attached memorandum describes the purpose of these BPA awards.

These standard operating procedures are intended to facilitate the understanding and use of these BPA awards.

Step I. Determine the appropriate services needed through a convening process that identifies the parties involved and the needs presented in the situation.

- A. Does the requesting office require the services of a mediator, facilitator, conflict coach, organizational development expert, change management expert, curriculum design professional or trainer, ombuds, or assistance with strategic planning, administrative or technical support for CORE PLUS program management, and/or other CORE PLUS related services or assistance?
- B. Are the neutral services of an expert or neutral sought to assist with current or anticipated litigation or a dispute situation?

Step II. Determine if the services sought are intended to address any current or anticipated litigation or dispute and select the most appropriate process for acquiring the services needed based on the specific circumstances presented.

Under the FAR (Section 6.302-3(2)(iii)), such services (i.e. conflict assessments, conflict management or dispute resolution assistance including conflict coaching, mediation, conciliation, facilitation, training or team building as an intervention):

A. Can either be sole sourced or competed between the two CORE PLUS vendors.

B. Procedure for Sole Sourcing option.

1. When initial determination indicates dollar value of services will not exceed \$3,000:

a. This is a MicroPurchase, and with the exception of engagements involving travel, can be handled directly between the program office requesting the service (Requesting Office) and the vendor.

b. The Government Credit Card can be used for micropurchases provided the engagement does not involve travel.

c. If the engagement does involve travel, the Requesting Office must go through its contracting office and obtain a Purchase Order, despite the fact that the value of the services is under \$3,000.

d. In working directly with a BPA vendor Requesting Office must obtain a verbal or written proposal (an e-mail is sufficient) for the service/s from the vendor.

e. If Requesting Office accepts the proposal, it must issue an acceptance in writing (an e-mail is sufficient) to the vendor. The acceptance should contain:

- i. a brief statement of the services purchased.
- ii. the time and location where the services will be rendered.
- iii. the number of hours estimated to be involved in completing the service, including time spent preparing for, and following up on, the service.
- iv. the name(s) of the individual(s) performing the service.
- v. whether the work will be billed at a firm fixed price rate or an hourly rate.
- vi. The fixed cost of the work to be done or the number to hours and the hourly rate.
- vi. The process for how the Requesting Office will be invoiced upon completion of the job.

f. If the vendor's proposal is accepted, Requesting Office/COTR shall work with vendor to make arrangements for services to be provided. This may include:

- i. Scheduling date and time for meetings/sessions.
- ii. Reserving meeting location/session space.
- iii. Other responsibilities included in the BPA.

g. During the process Requesting Office/COTR must monitor vendor performance to ensure it is complying with BPA.

h. Upon completion of process, providing terms and conditions of acceptance and BPA are satisfied, Requesting Office must pay vendor invoice.

2. When initial determination indicates that value of services will exceed \$3,000, or travel will be involved.

a. Requesting Office must work through its Contracting Office to obtain a Purchase Order.

b. Requesting Office should prepare a "Sole Source Justification" for its Contracting Office.

c. The sole source justification should cite Section 6.302-3(2)(iii) of the FAR, which allows for an exception to full and open competition "To acquire the services of an expert or neutral person for any current or anticipated litigation or dispute."

d. Requesting Office should prepare a Statement of Work (SOW) requesting a proposal for the service that should include:

- i. A brief statement of the services requested.
- ii. The time and location where the services will be rendered
- iii. The name of the individual performing the service.
- iv. The intended result of the process.
- v. The estimated price of the work.
- vi. Deadline for the proposal.
- vii. Requested format of the proposal (e mail, length, word document, etc.)
- viii. Invoicing information
- ix. Work Plan
- x. Labor categories involved in the work
- xi. Other expenses involved in performing the work.
- xii. Whether work will be performed at a firm fixed price or hourly rates.

e. Contracting Office will send by e mail the SOW to the BPA vendor.

f. If the vendor submits a written proposal that is accepted by the requesting office, Contracting Office may issue a Purchase Order to the vendor for the service. Note: Requesting Office must comply with procurement rules relating to availability of funding, etc.

g. If proposal is accepted, Requesting Office shall complete steps outlined in II (B)(1)(f) above regarding making arrangements for services, monitoring vendor performance, and remitting payment for invoices.

C. Procedures for Competing “Anticipated Dispute/Litigation Opportunities” between the BPA Vendors.

See competitive procedures outlined in Section III.

Step III. For services or assistance not related to “any current or anticipated litigation or dispute”:

- A. If the cost of the services is under \$3,000, services can be sole sourced as a micro purchase, provided no travel is involved. (See micro purchase procedures in Section II (B)).
- B. If cost exceeds \$3,000, then Requesting Office must work through contracting office to compete the opportunity between the two BPA vendors unless the opportunity fits within an exception (other than the “anticipated dispute” exception noted above) to full and open competition under the FAR. As an example, Section 6.302-1 of the FAR allows for sole sourcing when only one responsible source and no other supplies or services will satisfy agency requirements or *when one of the vendors will be providing follow on work or continuing to provide ongoing services in a situation where it would not be practicable or cost effective to engage a new vendor*. To satisfy these exceptions, Requesting Office must prepare a Sole Source Justification that is approved by its Contracting Officer.
- C. Requesting Office should draft a scope of work (SOW) containing all information listed in Section II(B)(2)d) above.
- D. Contracting Officer will send SOW to BPA vendors and specify response time.
- E. Requesting Office must determine selection criteria for evaluating proposals:
 - 1. Best Price: Award to vendor submitting lowest price.

2. Best Value: Award to vendor offering best value to government, with price and technical ability given consideration in evaluation. Lowest price does not necessarily win the Task Order.

F. Requesting Office reviews proposal(s) against these selection criteria.

G. After determining which proposal to accept, Requesting Office informs Contracting Officer, and Contracting Officer issues Purchase Order for services (including invoice information) to successful BPA vendor.

H. If proposal is accepted, Requesting Office shall complete steps outlined in II (B)(1)(f) above regarding making arrangements for services, monitoring vendor performance, and remitting payment for invoices.

Attachment: Award Announcement dated January 4, 2008