**Digital Acquisition MVP**

**Release 3: How Do You Buy? – Classroom Session**

Release 3 – Collaborative Classroom Session Participant Materials

November 2016

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# Digital Acquisition MVP Release 3: How Do I Buy? Collaborative Classroom Session

## Overview

The Digital Acquisition MVP Release 3 Collaborative Classroom Session brings you together to:

* Reflect on what you learned in Release 2 on understanding what you’re buying, and continue developing your acquisition strategy from Release 3.
* Transition from the acquisition strategy to developing an acquisition package.
* Share the results of your live digital assignment with the rest of the cohort, focusing on your testing plan, progress to date, and challenges encountered.

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| Tuesday, November 15 8:00 a.m. – 4:00 p.m. |
| * Release 2 Review * The Acquisition Strategy & Organizational Readiness * Exercise: Exit Strategies |
| **LUNCH** |
| * Pricing/Contract Type for Cloud and Agile * Live Digital Assignment Group Work |

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| Wednesday, November 16 8:00 a.m. – 4:00 p.m. |
| * Using the Lean Acquisition Canvas * Competing, and WINNING, in the Arena of Ideas |
| **LUNCH** |
| * Challenge.gov Guest Speakers * SOOs, SOWs, PWSs…Oh My! |

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| Thursday, November 17 8:00 a.m. – 4:00 p.m. |
| * MAP Case Study: SOO Selection * Putting It All Together * Security Considerations |
| **LUNCH** |
| * Acquisition Package Vendor Roundtable Activity |
| Friday, November 18 8:00 a.m. – 4:00 p.m. |
| * Release 4: Awarding & Administering Digital Service Contracts Intro * Metrics Activity |
| **LUNCH** |
| * Live Digital Assignment Report Out and Reflection * Classroom Session Conclusion |

# Release 2 Review Session

William Randolph discusses important digital services acquisition strategy concepts from Release 2: Understanding What You Are Buying.

Use the space below to record any questions that you have, any points you find interesting, or to take notes on any concepts that your assessment results indicated were not your strongest.

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# The Acquisition Strategy & Organizational Readiness

Traci Walker of USDS will walk through key points of the acquisition strategy, including different strategies to use based on your organization’s readiness.

Use the space below to record notes during the session. Resources to aid your acquisition strategy are on the following pages.

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## Digital Service Acquisition Strategy Guide

You saw an earlier draft of this strategy guide in the MAP Case Study: Developing the RFQ – Part I activity from Iteration 3.B: Acquiring Digital Services. Below is an updated version that Traci will review with you.

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|  | **Novice** | **Intermediary** | **Expert** |
| Agency/Program Persona Characterization | Has not done agile or digital service before. | Has done agile or digital service as a project and is familiar with concepts and deliverables | Comprised of designers, engineers, agile SMEs who are steeped in the concepts and can actually perform the work |
| Requirements Document | SOO | SOO + PWS | SOO + PWS + SOW |
| Trust Factor | Build Together | Walk in the door | Inherent throughout |
| Team Composition: Gov to Contractor blend | High contractor blend for majority of work: Government provides: COR, Product Owner and stakeholders government | Moderate to high level of contractors providing majority of work: Government provides: COR, PO, Stakeholders, UX, UI, some Dev | Blended team environment with potentially equal blend of Government and contractor. |
| Implementation Pace | Slow/Methodical | Ramping up | Ground Running |
| Initial POP Recommendation\* | Minimum 3 months - 6 months | 6 months- 1 year | 1 year + options |
| How success is determined | End Users of system happy with outcomes,  Program team understands how success was met | End users happy,  Program team and stakeholders happy with value delivered | End users happy, Program team satisfied with performance, Gov’t Dev/Engs approve of practices/process |
| How to validate vendor’s proposals in solicitation | Past Success in delivering product in bureaucratic environment, Solution provides the “HOW” | Past success, describe How, and some measure of validation  (Orals, scenario based response, due diligence) | Past Success, body of work (github repos, portfolio), coding challenges |
| General Pace of Delivery | Slower delivery, best practices forming | Continual release of working product, optimization occurring with teams and program | Rapid + continuous development and implementation |
| Contract Type | T&M for baselining; with plan to convert and define FFP for future tasks | FFP per Iteration | T&M |
| Key Personnel | Not Recommended | Certain Roles potentially | Yes |
| Incentives | None, Award Term, Past performance | Award Term, Past performance, Incentive or Award Fee | Past Performance, Award Term |

## How Do I Buy Digital Services?

Use the following guidelines to aid you in buying digital services.

**Acquisition Principles for Digital Service Procurements:**

1. Focus on the **most pressing needs** for end users; procure outcomes that deliver **customer-centric solutions.**
2. Great digital service providers are often motivated by the **problem they can solve**; use agency mission and user challenges to **attract this talent** to solicitations.
3. Pay for **results,** not time; **working product** is the ultimate metric of success.
4. Contract scope should be designed to capture the **spirit of ever-changing technology**; use period of performance and pricing strategies in lieu of **locking in** technical requirements.
5. Technology enhancements do not **“end”**; buy design and agile software development services as a **repeated process** for the delivery of working product.
6. Budgets should be **investments** into finding the best technological solution; use that solution only to the extent that it continues to **derive value.**
7. **Buy small, build small, test, iterate if necessary;** set up your contract for a **quick win** then determine how to scale the success.
8. Acquisition of digital services should leverage the **efficiency of commercial contracting methods;** these services and supplies are defined and sold by the commercial marketplace.
9. Evaluate the **quality of previous delivery expertise** as an indicator for future performance; choose teams that have **demonstrated success** in developing trust, accountability, and navigating cultural barriers.
10. Get solutions into the hands of end users **quickly**; incorporate accessibility, security, and other compliances into the process to **avoid bottlenecks.**

# Exercise: Exit Strategies

Think about how you would handle the scenarios from this activity in your own agency. Record your thoughts below.

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# Let’s Talk Pricing/Contract Type for Cloud and Agile

USDS speakers will walk through key points of pricing and contract types for cloud and agile procurements.

Use the space below to record notes during the session.

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# Using the Lean Acquisition Canvas

So far in Iteration 3.A: Developing an Acquisition Strategy, you have:

* Completed the lean acquisition canvas template.
* Identified what information would prevent you from completing the strategy.
* Identified the strategy you would use to secure the outstanding information needed to complete your acquisition strategy.

For this activity, you will use your draft acquisition strategy. Review the activity instructions below, and prepare to report out to the cohort at the conclusion of this activity.

## The Situation

Using the MAP Case Study, compare notes on your individual lean canvases.

## The Challenge

As a team, develop one consolidated lean canvas for the MAP case study. You should document trade-off decisions, areas where you still need information, and critical decision points.

* Work in your teams to develop a consolidated lean acquisition canvas on paper as a team
* Two teams will combine to discuss and develop one consolidated lean canvas

**Structure**

* Work in your teams to develop a lean canvas
* Prepare a verbal briefing to share what choices you made in combining your strategies and any tradeoffs made in the process
* Be prepared to share your results with the class

**Instructions**

* Take 30 minutes to complete your team canvas
* Take 45 minutes to review other teams’ canvases and develop a joint strategy with sticky notes

**Time**

# Using the Lean Acquisition Canvas

In the space below, record any notes you gather working with your team, including: trade-off decisions, areas where you still need information, and critical decision points.

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# Competing, and WINNING, in the Arena of Ideas

Will Randolph will speak about influence tactics you can use to ensure you have a winning acquisition package.

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# Challenge.gov Guest Speakers

In the space below, record any notes from this guest speaker session.

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# SOOs, SOWs, PWSs…Oh My!

Record any notes from this session on the different types of requirements documents.

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# MAP Case Study: SOO Selection

For this activity, you will

## The Situation

Using the MAP Case Study, you choose the SOO that best suited your acquisition strategy as individuals.

## The Challenge

In teams, work together to determine the best SOO for your strategy.

* Work in your teams to choose a “team SOO” for your case study

**Structure**

* Work in your teams to prepare a briefing on why you chose a certain SOO over another; what were the tradeoffs?
* Be prepared to share your results with the class

**Instructions**

* Take 15 minutes to discuss, analyze, and formulate a verbal briefing to share your findings with the class.

**Time**

### Report Out

While working with your group, prepare to address the following questions:

* What SOO did you choose?
* Why?
* What were your tradeoffs?

# Putting it All Together

Now that you have chosen the SOO that is best suited for your acquisition strategy, you will develop evaluation criteria and complete the RFQ.

* In the same teams, you are now moving from SOO selection to development of evaluation criteria.
* Choose a team leader to report out to the class, as well as a person to document your evaluation criteria.

**Structure**

* As a team, write your evaluation criteria language, based on your SOO and strategy.
* Be prepared to share your results with the class.

**Instructions**

* You will have 45 minutes to discuss, analyze, and formulate a verbal briefing to share with the class.

**Time**

## Report Out

Each team will take 5 minutes to brief out their evaluation criteria and provide any tradeoffs or considerations they had to resolve.

# Acquisition Package Vendor Roundtable Activity

By the end of this activity, you will be able to discuss/analyze a draft acquisition package and incorporate feedback from vendors.

You will also continue developing your ability to think innovatively around how to effectively procure digital services that deliver outcomes for the government.

## High-Level Instructions

* Teams will present their draft acquisition packages to vendors who have had experience responding to innovative RFPs.
* Vendors will provide feedback based on their past experiences in the digital services space.
* Teams will update their acquisition packages based on feedback.
* Report-Outs
  + 5 minutes to present
  + 5 minutes for question
* Roundtable discussion with vendors

## Ideas, Tradeoffs, Thought Process

For the first **15 minutes** of this activity share your acquisition package with the vendors.

* What led you to this point?
* What decisions were made along the way?

## Vendor Feedback

For 30 minutes, listen to feedback from your vendor. Take any notes below:

## Acquisition Package Revisions

Based on your vendor’s feedback, you will have **30 minutes** to revise your acquisition package. Reach out to your assigned vendor or facilitation staff if you have any specific questions.

## Team Report-Outs

Use the space below to write down any questions or notes from the team presentations.

# Vendor Roundtable

Record any notes from vendor roundtable discussion below.

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# Digital Services: More Secure Than You Think They Are

Guest speaker Evan Cooke will discuss leveraging the cloud -- how the cloud works, securely connecting to the cloud, mobile devices and the cloud, and compliance and the ATO process. Take any notes from the session in the space below.

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# Release 4: Awarding & Administering Digital Service Contracts Introduction

**Iteration 4.A: Awarding Digital Service Contracts**

* The source selection and award process
* Preparing for post-award management, kick-off, expectations, schedule

**Iteration 4.B: Digital Services Delivery**

* Performance evaluation – How do you know when it is going badly?
* Using an exit strategy

Use the remaining space to take notes on the Iteration 4.A and 4.B previews.

# Metrics Activity

## Why this Activity is Important

The importance of tracking and monitoring digital and agile:

* COs don’t need to run the data, but they do need to know the questions to ask to uncover potential issues or risks to your project
* Gives you a sense of the types of challenges that arise when managing digital and agile projects

A total of 5 scenarios you could encounter when managing agile, Kanban, and Cloud

* Recognize that the same data could tell different stories
* Work with your group to generate questions and answers about the data and identify what is, or should be, happening in each scenario
* Learn from others’ experiences managing these projects

**Activity Overview**

* Set of cards on your table that include a situation on metrics (each table has a different set of cards)
* Cards include 3-4 questions that become more involved/introduce new details – take about 4-5 minutes on each question – you will have 15 minutes on each rotation

**Activity Instructions**

* Turn over the first card, review the situation, and respond as a group
* Turn over the next card in your stack, respond to it, etc.
* Organize the stack for the next group and rotate; you’ll rotate to all 5 situations