**MAP Case Study Materials**

# **Iteration 2.A: Understanding Your Needs and Agency Readiness**

## [Section 1: Case Study Overview](https://dsat.gsa.gov/courses/course-v1:OMBChallengeX+DAP01+2016_01/courseware/71b467daf27345b3aa759b287b8c22e1/7f2ac958495b4b07812ddd2b7499d1b2/)

**MAP Mission:**

The MAP Mission: Establish, publish, and enforce policy for the federal government regarding allowable literary practices, formats, and techniques in official government documents and agency records. MAP accomplishes this mission by:

* + - * Collecting and screening published, written work product content developed by employees of all federal government agencies employees for 1) violations of established literary policy, and 2) analysis of emerging literary trends. This includes federal agency reports, regulations, policies, and other content published and available for government and public consumption on federal web sites.
      * Reviewing requests from government agencies and private sector entities for use of non-compliant literary practices, formats, and techniques.

MAP’s secondary mission is to provide the private sector, which includes industry and private individuals, complete information on current government writing practices so that they can effectively communicate with government agencies in the written word.

**Existing conditions and other information**

MAP has an existing proprietary application in place supporting their mission called Communication Options, Written Services System (COWSS). It has a web interface for the users (agency employees and customers) and fixed (uneditable), web-based forms for both customers and case worker employees at the agency. The data fields in these forms are linked to an Oracle database built for COWSS that helps the employees perform their MAP mission and provides basic metrics for employees, supervisors, and senior leadership. MAP has had to purchase an Oracle enterprise license to run the database and receive patches/upgrades to Oracle.

* + - * COWSS also has the ability to accept user-generated attachments such as MS Office files and pdfs, as well as the ability to generate various reports and metrics based on an established set of data fields in the system.
      * COWSS’ is a proprietary software solution built by the contractor (Niagra Overpriced Software Enterprises or “NOSE”)
      * COWSS was developed using waterfall development and cost $6.6M over three years to develop and deploy on MAP agency servers.
      * The COWSS user interface has been optimized for laptops or desktops using Microsoft Internet Explorer.
      * The text editing and publishing features of the system run off of Adobe Acrobat and Microsoft Office Suite applications.
      * NOSE built interfaces integrate and connect the various different pieces of software that comprise the COWSS application. COWSS also interfaces with both internal MAP agency  systems and the external systems of other federal agencies  The interfaces between the systems were built by NOSE

**Program Environment:**

Recently, MAP has been getting feedback from its users and other stakeholders that COWSS application is not as user friendly or effective as it could be for both customers and MAP employees and leadership. Recent metrics from the system indicate that this is having an increasingly negative effect on mission accomplishment:

* + - * Conversion rates have dropped (Number of customers who come to the site and actually follow through on transactions using the system)
      * While the system has the ability to assign workload to appropriate divisions within the MAP agency based on customer needs, tracking the completion of that workload is problematic in the current system.
      * There is a substantial lack of granularity in available system metrics to help manage workload and provide the basis for MAP budget requests.
      * The web-based forms and their associated data fields/data elements were adequate when the system was first delivered, but the forms and their presentation in COWSS need to be updated for user utility and account for new data requirements.
      * The volume and frequency of use by both government and private sector customers has expanded substantially due to government transparency initiatives and the availability of the internet. The customer visits to the MAP COWSS website and transactions (data requests, content submissions, rules clarification requests, policy searches, etc.) has increased to over 1M/year from the 50K experienced when initially delivered and deployed in Jun 2013. As a result, neither the agency servers nor COWSS can effectively handle the traffic load.
      * Some processes, procedures, and policies that govern the interaction between MAP and its customers have changed and need to be reflected in the existing software application.
      * Due to the nature of the MAP agency mission, information on its budget, operations, and value to the US taxpayer needs to be posted to Data.gov and regularly updated in support of government transparency initiatives.

In July 2013, NOSE was awarded a sole-source “Base + 4” IDIQ contract with MAP with a ceiling, including all options, of $5.5M, equally divided among the contract period ($1.1M/year). The contract was issued primarily for Operations and Maintenance, and task orders have been executed and funded for this purpose in the base and every option year. The contract was executed as an Indefinite Delivery/Indefinite Quantity (IDIQ) so that MAP would also have the ability to issue task orders for upgrades and new functionality. The contract is currently a few months into its third option period.

**Your current situation and first steps:**

You are the new contracting officer supporting COWSS and other MAP digital services programs.

The program and contract have the visibility of the Agency Director, due to it being the principal interface between the agency and its customers. With federal digital services getting such frequent media coverage, the critical nature of the agency’s mission, and the Open Data transparency initiative, the Director of MAP (D/MAP) wants to make sure that what the agency has is not only mission-effective, but also cost-effective.

Because of this directive, the COWSS program has been slated to be transformed into a digital service product that will serve the customers. The Agency Director wants to utilize modern technology and capitalize on the digital trends but does not understand the market well enough to prescribe a solution.

The first step you have taken is to work with your requirement owner(s) to develop a Product Vision that identifies the digital services needs and will guide your subsequent work in conducting market research, defining requirements, developing an acquisition strategy, source selection, and ultimately, contract performance management.

It is important to note that the Product Vision does not immediately specify *how* you will proceed to satisfy the agency’s need but talks to what success and outcomes look like.

After a three intense days of work, you and your team have developed the following Hypothesis, Assumptions and Product Vision:

*Hypothesis: By improving the underlying technology solution for the system that provides government and private sector customers a way to submit written content for review, request, and receive guidance on approved literary formats and protocols, customers have easy, intuitive, and immediate access to all appropriate MAP content, real time status of their cases, and follow-up which will improve the quality of published government literature.*

*Assumptions:*

*\*The system will need to provide flexibility to rapidly incorporate and integrate new data fields, forms, and web-site organization/presentation in support of changing mission processes, data needs, workload management and metrics/reporting needs, and government transparency policies.*

*\*End users will want to access this system on both mobile and web formats.*

*\*The current system will not be able to handle the requests of end users beyond the year without a change.*

*Product Vision: This product will enable government and private sector customers with the ability to create and receive real time feedback on compliant government documentation which adapts to current literary trends and protocols.*

**Activity: Analyzing a Digital Services Need**

Using the scenario information and the Product Vision provided, analyze the digital services need to determine what services or products in the digital marketplace already exist and may be useful in satisfying the MAP agency needs.  Explore whether open source, proprietary, or COTS will be most effective. Consider this in light of the recently published Federal Source Code Policy instructions about the three step [Software Solution Analysis](https://sourcecode.cio.gov/Three-Step-Software-Solutions-Analysis/) which states, “agencies must consider open source, mixed source, and proprietary software solutions equally and on a level playing field.” As a Contracting Officer, you need to be able to understand the differences between these types of solutions and where they exist in the market.

Your research and deliverables in this assignment will be used in a team exercise during the Release 2 classroom session. Bring the results from your individual assignment below to the session and be prepared to contribute, discuss and present findings on a team basis.

**Individual assignment:**

1. List the sectors of industry that might need a similar product or service other than the federal Government. Can you determine what products they use? If so, describe or list them:
2. Consider the digital services layers and what market segment areas may be applicable to satisfying the agency need. Describe how you think these products and services could satisfy the agency need. What are examples of available products and services that could be used for this system (e.g., Wikipedia)?
3. Individually research potential Open Source, Commercial Off-The-Shelf (COTS) and Proprietary solutions and their likely respective impacts (positive and negative) on satisfying the product vision. Your individual research in this portion of the assignment is assigned according to which team you are on:
   * + - Members of the WebExers and Pied Piper teams will research Open Source solutions.
       - Members of the Stone Ponies and Team US teams will research COTS solutions.
       - Members of the Scrum n’ Roses and Fragile Development teams will research Proprietary solutions.

*Open Source: (Members of the* WebExers *and* Pied Piper *teams)*

* + - * Research and provide an example of an Open Source product(s) or community that might be able to meet this need?
      * What are the attributes of this open source product that potentially make it a fit for the product vision?
      * Can you determine what kind of license does this open source product use? (<https://opensource.org/licenses>)
      * What are your initial pros and cons of this solution that can be identified through your market analysis?

*Commercial Off-The-Shelf (COTs): (Members of the*Stone Ponies*and*Team US *teams)*

* + - * Research and provide an example of a COTS product(s) that might be able to meet this need.
      * Is it an out of the box solution or do you think configuration would be required to meet the product vision?
      * What are your initial pros and cons of this solution that can be identified through your market analysis?

*Proprietary: (Members of the* Scrum n’ Roses*and* Fragile Development *teams)*

* + - * Assuming there is no COTS system that out of the box is available that may satisfy the need, is there one that can be customized to meet this requirement?
      * Are there products or solutions that can be added to the current proprietary system to meet the hypothesis and product vision?
      * What are your initial pros and cons of this solution that can be identified through your market analysis?

***Note that in the Release 2 classroom session, participants completed an in-person activity based on this self-directed activity. See Day 3 PPT slides for a summary of this activity*** [***here***](https://dsat.gsa.gov/courses/course-v1:OMBChallengeX+DAP01+2016_01/courseware/da397bdc9d4b4ae3be72e2240b5379f0/f534d5d85cdf431383226fc3ed9dd666/) ***on the portal.***

# **Iteration 3.A: Develop an Acquisition Strategy**

## [Activity: Developing the Acquisition Strategy](https://dsat.gsa.gov/courses/course-v1:OMBChallengeX+DAP01+2016_01/courseware/cc2f78a334f24c17940c2164df6740a6/7c3e6dd2a68040acbf29e5b95406c8b4/)

**Overview/Background:** As a follow-on to the market research you’ve already completed both individually and within your teams, and using the [Iteration 3.A The Acquisition Strategy](https://dsat.gsa.gov/courses/course-v1:OMBChallengeX+DAP01+2016_01/courseware/cc2f78a334f24c17940c2164df6740a6/d3df202ae24941f082cd9e139a0b2b8d/) online learning information, develop an initial acquisition strategy for the MAP case using the lean acquisition canvas. This is an individual exercise during Release 3 A. In addition to the market research information you gathered previously, please see supplemental information on the MAP case in the [attached file](https://studio.dsat.gsa.gov/assets/courseware/1ca75f2ca2643c1a201ded5a79421d58/asset-v1:OMBChallengeX+DAP01+2016_01+type@asset+block/MAP_Case_-_IGCE_2016_10_20.xlsx).

**Individual assignment:**

* 1. Based on your team results of the market research that you completed in class in Iteration 2, use that information to influence  our acquisition strategy.
  2. To the extent possible, complete the [lean acquisition canvas template](https://studio.dsat.gsa.gov/assets/courseware/0836fce2ab77966dcdda253b0f7ba1f2/asset-v1:OMBChallengeX+DAP01+2016_01+type@asset+block/Lean_Acquisition_Canvas.pptx)attached with information provided or with logical extensions of available information to form a vision of what and how this requirement will be acquired.
  3. For any section(s) that you are not able to credibly complete, please identify what information is required that would prevent you from completing the strategy.
  4. Identify what strategy you would use to secure the outstanding information needed to complete your acquisition strategy.
  5. You are encouraged to collaborate within your team for ideas and to complete this draft assignment. However, you will each submit your own draft acquisition strategy.
  6. The focus of your individual strategy development is assigned according to which team you are on:
     + Members of the WebExers and Pied Piper teams will continue to focus on Open Source solutions.
     + Members of the Stone Ponies and Team US teams will continue to focus on COTS solutions.
     + Members of the Scrum n’ Roses and Fragile Development teams will continue to focus on Proprietary solutions.

Refer back to the [Iteration 2.A activity](https://dsat.gsa.gov/courses/course-v1:OMBChallengeX+DAP01+2016_01/courseware/ee98b671d8674d4eb6f551369522c32d/27ec9342ca544473958ff9ac8dfe9be2/) to refresh your memory on the research you completed in each of these areas and any additional case study background information you need.

Your research and deliverables in this assignment will be used in a team exercise during the Release 3 classroom session.

**Due Date:** Your draft acquisition strategy is due on Nov. 4. Please submit your response to the program email (DigitalAcquisitionMVP@icfi.com) and your assigned coach’s email. In addition, bring the results from your individual assignment below to the session and be prepared to contribute, discuss, and present findings on a team basis.

**Definition of Done:** You will submit a completed lean acquisition canvas for your assigned procurement market segment.

# [Iteration 3.B: Acquiring Digital Services](https://dsat.gsa.gov/courses/course-v1:OMBChallengeX+DAP01+2016_01/courseware/ee98b671d8674d4eb6f551369522c32d/27ec9342ca544473958ff9ac8dfe9be2/)

**MAP Case Study: Developing the RFQ - Part I (B)**

**OVERVIEW**

Based on the [acquisition strategy](https://dsat.gsa.gov/courses/course-v1:OMBChallengeX+DAP01+2016_01/courseware/cc2f78a334f24c17940c2164df6740a6/7c3e6dd2a68040acbf29e5b95406c8b4/) you developed in Iteration 3.A using the lean acquisition canvas, the next step is to begin developing your RFQ. In the upcoming classroom session, you'll spend time developing the RFQ together in class. To prepare for those activities, we're providing you with three example SOOs below that USDS drafted to support agencies at various levels of maturity and to procure various types of technology.

* + [SOO #1: Learn the Process](https://dsat.gsa.gov/assets/courseware/ddde9c7446446b8b64b4cdd53fc4ab35/asset-v1:OMBChallengeX+DAP01+2016_01+type@asset+block/Learn_the_Process_SOO_v.4_103116.docx)
  + [SOO #2: Select Your Technology](https://dsat.gsa.gov/assets/courseware/fec45dd303b2fb49666322bcecd7bd59/asset-v1:OMBChallengeX+DAP01+2016_01+type@asset+block/Select_Your_Tech_SOO_v_4_103116.docx)
  + [SOO #3: Digital Minimum Viable Product (MVP)](https://dsat.gsa.gov/assets/courseware/8fde30c1983bbeeb8b40783647aa8b31/asset-v1:OMBChallengeX+DAP01+2016_01+type@asset+block/Build_a_Digital_Service_MVP_SOO_v.4_103116.docx)

These three SOOs are part of the [Digital Services Exceptions for SBA 8(A) Awards How-To Guide](https://dsat.gsa.gov/assets/courseware/f8e89118264c2cf369ca26067ab25f56/asset-v1:OMBChallengeX+DAP01+2016_01+type@asset+block/Digital_Services_8_a__Exemptions_-_How-To_Guide_v.4_103116.docx). Read through this informative guide to gain insights in to the purpose and benefits of these particular SOOs.

To help you make your selection, you can also refer to the in-progress [Digital Service Acquisition Strategy Guide](https://dsat.gsa.gov/assets/courseware/4b225fa8c5014754a23d6351c19cd733/asset-v1:OMBChallengeX+DAP01+2016_01+type@asset+block/Digital_Service_Acquisition_Strategy_Guide_DRAFT_10-25-16.docx) that USDS is currently developing. This guide is intended to help you think about how "mature" your agency is with respect to digital services design and development and to make decisions accordingly.

**GOAL**

This activity will help you apply what you've learned in the program to date to take next steps with the MAP case study. Select the SOO that is most aligned with your acquisition strategy and will allow you to achieve your desired outcomes.

*Note: You don't need to develop a SOO, but instead, analyze these sample SOOs to find one that would be the best fit for you to use as your template.*

**INSTRUCTIONS AND DEFINITION OF DONE**

Select one of the three SOOs provided that is most likely to allow you to achieve your desired outcomes and execute your acquisition strategy. Consider the following questions as you make your selection and be prepared to discuss your results with your team and the class:

1. What SOO did you choose and why?
2. What made one SOO a better fit over another?
3. As part of the process, do you need to train your team on using agile? How "mature" are they in their use of agile? How will you account for this?

*Note: As Part of SOO selection and planning, have you considered if you should select your technology first? Another consideration may be whether or not to create an MVP.*

Be sure to consider the guidance provided in the [Digital Services Playbook](https://playbook.cio.gov/), [TechFAR](https://playbook.cio.gov/techfar/), and FAR part 39 when choosing your SOO. You can also check out the [TechFAR Hub](https://techfarhub.cio.gov/do-IT/) and as additional resource.

**Definition of Done:** Select your SOO and answer the above questions. Bring your notes to class and be prepared to discuss with your team and class.

**Due Date:** You should be ready to share your results during the Nov. 15-18 classroom session.

***Note that in the Release 3 classroom session, participants completed an in-person activity based on this self-directed activity. See Day 3 PPT slides for a summary of this activity*** [***here***](https://dsat.gsa.gov/courses/course-v1:OMBChallengeX+DAP01+2016_01/courseware/ee98b671d8674d4eb6f551369522c32d/795638fc86a04e68bc83b3d1bafd1659/) ***on the portal.***

# Iteration 4.A: Awarding Digital Service Contracts

# [**Learning Activity: The Tradeoff Game**](https://dsat.gsa.gov/courses/course-v1:OMBChallengeX+DAP01+2016_01/courseware/06beaf5c90b1400da673d18a0244671f/e091b0b5bc034a98989f1b17a3616bcb/)

## **GOAL**

The objective of this activity is to arrive at the best value solution for the MAP case study. The agency has initially budgeted $500,000 for the initial MVP effort, however there is more funding available. Your assignment is to identify which company represents the best value based on program priorities for this effort, consistent with the evaluation plan and RFP, and the tradeoffs that can be made by reviewing the technical evaluation and price submitted.

[STAFF DEBUG INFO](https://dsat.gsa.gov/courses/course-v1:OMBChallengeX+DAP01+2016_01/courseware/06beaf5c90b1400da673d18a0244671f/e091b0b5bc034a98989f1b17a3616bcb/#b7814016fbd341fd9aea07fd508ecf1a_debug)

## **INSTRUCTIONS**

**Step 1:** Assume that based on your acquisition strategy, you decided that issuing an RFQ under FAR Subpart 13.5 which focused on building an MVP was the best approach. First, review the [“Build a MAP MVP” SOO](https://dsat.gsa.gov/assets/courseware/3524d95ad752d42e66400d539a6b7c16/asset-v1:OMBChallengeX+DAP01+2016_01+type@asset+block/4A_Build_a_MAP_SOO.docx) that was developed. This is the statement of agency requirements forming the basis of the RFQ and which vendor proposals are providing their solutions against. Note that this SOO will look familiar, as it’s based on the Build an MVP template that you worked with in Release 3.

**Step 2:** Next, review [the associated evaluation criteria](https://dsat.gsa.gov/assets/courseware/09be5be0fdf29e3d15c57216944ea37c/asset-v1:OMBChallengeX+DAP01+2016_01+type@asset+block/4A_SOOEvalCriteria.docx). These criteria are based on what the Build an SOO team developed in the Release 3 classroom session.

**Step 3:** You issued your RFQ and have received two vendor responses from Semper Agile and Always Shippin’. For this activity, assume that your technical evaluation team has already evaluated each proposal based on the criteria provided and has provided you with their technical evaluation. Review the results of the proposal evaluations and the submitted price quotes.

* + - **Semper Agile:**

[Proposal Evaluation Results](https://dsat.gsa.gov/assets/courseware/d2425b5a75aabc4eac3f4cee1e0b19cb/asset-v1:OMBChallengeX+DAP01+2016_01+type@asset+block/4A_Proposal_Evaluation_Results.docx)

[Price Quote](https://dsat.gsa.gov/assets/courseware/64f6faef6f14a71ec11effa90895bade/asset-v1:OMBChallengeX+DAP01+2016_01+type@asset+block/Vendor_Price_Proposal-Semper_Agile.docx)

* + - **Always Shippin’:**

[Proposal Evaluation Results](https://dsat.gsa.gov/assets/courseware/d2425b5a75aabc4eac3f4cee1e0b19cb/asset-v1:OMBChallengeX+DAP01+2016_01+type@asset+block/4A_Proposal_Evaluation_Results.docx)

[Price Quote](https://dsat.gsa.gov/assets/courseware/bc41409b39b3bac7f123efc833ff2b93/asset-v1:OMBChallengeX+DAP01+2016_01+type@asset+block/Vendor_Price_Proposal-Always_Shippin.docx)

**Step 4:** Review/identify the items each offeror can make to both enhance their offer in consideration of the identified weaknesses and to make a tradeoff decision.

* + - Discussions/Clarifications: Decide whether the proposals should be improved through opening discussions or clarifications with the offerors. In other words, what can the offeror do to improve their proposal so that it provides greater benefit?  It’s important to consider how improvements in technical aspects of the proposal may impact price. This should help you complete the table below.
    - Price Analysis: Conduct a price analysis to evaluate whether the pricing is fair and reasonable.  It’s also important to arrive at a price the agency can afford while still receiving maximum benefit- to this end, does a tradeoff decision provide a justification to ask for an increase in the budgeted amount?   This should help you complete the table below.
    - Tradeoff: Taking into consideration the Acquisition Strategy goals for the program, the two proposals and the price evaluation determine which company has provided the best value solution to deliver an MVP. List the tradeoff elements which led you to this conclusion. This should help you complete the table below.

Complete the Evaluation Worksheet for this [Activity (download here)](https://dsat.gsa.gov/assets/courseware/d3fb521b5a113911dffa2bf88d0869d6/asset-v1:OMBChallengeX+DAP01+2016_01+type@asset+block/4.AEvaluation_Worksheet.docx):

|  |  |  |
| --- | --- | --- |
| Acquisition Strategy/Program Goals | From the Acquisition Strategy what were the primary goals of the MAP Program for an MVP |  |
| Discussions/Clarifications | Should Discussions and/or Clarifications be opened? Y/N |  |
| If the answer is “YES” document what you would ask or clarify with each company | **Semper Agile:** | **Always Be Shippin’:** |
| Price Analysis |  |  |
| Are the Prices Fair & Reasonable? | Y/N | What lead you to this conclusion? |
| Is there a correlation between the pricing and the technical solution? | Y/N | What lead you to this conclusion? |
| Tradeoff |  |  |
| Based on the evaluation criteria, program goals, and budget considerations: list the tradeoff elements you notice about each solution. | **Semper Agile:** | **Always Be Shippin’:** |
| Which Vendor provides the best value? |  | |

\*Note: Even if you decided discussions should be held, conduct an initial tradeoff decision with the caveat, and if discussions improve the solutions, the decision could be revised.