



# Getting Ready for OASIS+

Jacob Bertram

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# Jacob Bertram



Principal Consultant



[JBertram@LohfeldConsulting.com](mailto:JBertram@LohfeldConsulting.com)



## EDUCATION

Washington State University  
**Master of Business Administration**

Harvard Business School  
**Leadership Certificate**

Central Washington University  
**BS, Accounting**

Stanford University  
**Continuing Professional Education**



## PROFESSIONAL HISTORY

- Principal Consultant, Lohfeld Consulting Group
- Senior Manager, Procurement Operations, Nordstrom Inc.
- Senior Director, Contract Operations, General Services Administration
- Contracts Director, Defense Contract Management Agency
- Contract Manager, Department of Energy
- Auditor, Defense Contract Audit Agency

## Client Support



Financial Consulting



Financial Technology



Cost Modeling



Color Team Reviews



Business System



Information Technology



Cost Reduction



Data Collection & Analysis

## GSA's Office of Professional Services & Human Capital

- Multiple Award Schedule - Professional Services, Large Category
- One Acquisition Solution for Integrated Solutions (OASIS)
- One Acquisition Solution for Integrated Solutions (OASIS) Small Business
- GSA SmartPay
- Human Capital and Training Solutions (HCaTS)
- Human Capital and Training Solutions (HCaTS) Small Business
- OASIS+

## 2020 Washington Technology Article

Recommendations

Continuously Open

Fixed Price & Cost Reimbursement

Unpriced

Competition at Order Level

Commercially Viable Orders

Automatic Awards



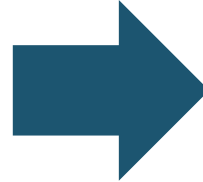
*We made several recommendations to GSA publicly through **Washington Technology** and **Government Matters** in August 2020.*

*GSA adopted many of our recommendations to build a better contract vehicle.*

## The Future of Professional Services

### GSA MAS

- Set labor categories
- Rigid rates
- Pricing modifications
- Commercial only



### OASIS+

- No defined labor categories
- Flexible pricing
- No modifications
- All contract types

## Features of the Draft RFP

Domain-based  
Structure

Commercial &  
Non-Commercial  
Services

Master contract  
is **not priced**

No contract ceiling,  
no cap on number  
of awards

Continuous  
On-Ramping after  
initial award period

Technology-based  
ordering & market  
research tools

# GSA Milestones

## Acquisition Planning

GSA met with many leaders in both industry and government to form the draft RFP

## Award Announcements

Early 2024 - GSA plans to shut down the solicitation to deal with protests

## OASIS Unrestricted Ordering Period Ends

Transition to OASIS+





# Industry Milestones

Now

## **Prepare**

Set your strategy, gather your artifacts, verify compliance, register for Symphony, and take the training (primary and back up)

Solicitation  
Release

## **Review**

Perform gap analysis of draft to final

White glove review

Solicitation +  
From RFP  
Release to  
Submission

## **Submit**

Do the work now to be prepared to submit your proposal shortly after the release

On going

## **Customer Coordination**

Determine which customers, or potential customers, will use OASIS+

# Scope



## Proposed Phase 1 Domains

- Technical & Engineering
- Research & Development
- Management & Advisory
- Environmental
- Intelligence Services
- Enterprise Solutions  
*Unrestricted Contract Only*
- Facility Services
- Logistics

## Proposed Phase 2 Domains

- Financial Services
- Business Administration
- Human Capital
- Marketing & PR
- Social Services

# Contract Program



# Proposal Volumes



Volume 1

General

Volume 2

Qualifying Project Experience

Volume 3

Federal Prime Contractor Experience

Volume 4

Systems, Rates, & Clearances

Volume 5

Certifications

Volume 6

Past Performance

Volume 7

Responsibility

## Evaluation Strategy



All Highly Qualified  
Offerors



No Cap on Maximum  
Number of Awards



No Contract Ceiling



Price Not Evaluated

## Qualifying Strategy

*Qualifying threshold must be achieved using a combination of project and corporate-level criteria*

- Qualifying projects have the majority of credit
- Domain qualification standard for domain critical scope
- Enterprise solutions domain (unrestricted only)
- Intelligence domain

## Prepare Your OASIS+ Response

- Assemble the internal team for proposal preparation
- Determine roles and determine who will submit in Symphony (and back up)
- Determine qualifying projects and experience
- Ensure your firm meets minimum requirements
- Gather artifacts
- If you qualify based on an acquisition...ensure proper marking of artifacts to ensure the evaluator understands different names
- Prepare as if you are submitting now

## How Lohfeld Consulting Helps

Lohfeld Consulting eases the burden of preparing OASIS+ responses by providing:

- Consultants to help you evaluate candidate projects and review your response
- An automated OASIS+ Proposal Tracker Tool to expedite your assessment, review, and optimization process

LinkedIn: [www.Linkedin.com/company/Lohfeld-Consulting-Group](https://www.linkedin.com/company/Lohfeld-Consulting-Group)



## Qualifying Strategy

- Tracks status using the JP9 Score Sheet standards
- Enables you to enter your potential project information
- Verifies qualifying data
- Calculates eligible points and totals
- Tracks associated evidence/artifacts
- Set up to analyze scores in both the unrestricted and small business categories
- Contains a tab with all domain definitions for easy reference

Activity	Definition	Start	End	Status	Points
JP 1001	... of ...				
JP 1002	... of ...				
JP 1003	... of ...				
JP 1004	... of ...				
JP 1005	... of ...				
JP 1006	... of ...				
JP 1007	... of ...				
JP 1008	... of ...				
JP 1009	... of ...				
JP 1010	... of ...				
JP 1011	... of ...				
JP 1012	... of ...				
JP 1013	... of ...				
JP 1014	... of ...				
JP 1015	... of ...				
JP 1016	... of ...				
JP 1017	... of ...				
JP 1018	... of ...				
JP 1019	... of ...				
JP 1020	... of ...				
JP 1021	... of ...				
JP 1022	... of ...				
JP 1023	... of ...				
JP 1024	... of ...				
JP 1025	... of ...				
JP 1026	... of ...				
JP 1027	... of ...				
JP 1028	... of ...				
JP 1029	... of ...				
JP 1030	... of ...				
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JP 1042	... of ...				
JP 1043	... of ...				
JP 1044	... of ...				
JP 1045	... of ...				
JP 1046	... of ...				
JP 1047	... of ...				
JP 1048	... of ...				
JP 1049	... of ...				
JP 1050	... of ...				

*The tracker video is available on the Lohfeld Consulting website and LinkedIn pages*

## What to do When the Final RFP is Released

- Review final RFP and perform gap analysis
- Make changes as applicable
- Submit on schedule
- Begin customer coordination



## Customer Coordination

Advise your customers you are submitting an offer to GSA

Questions to ask your customers:

- Do you have an MOU with GSA regarding OASIS and OASIS+?
- Will you use the contract vehicle?
- Do your contracting officers have a delegation of procurement authority from GSA for OASIS?

What new customers can you access with OASIS+?

Do these agencies have an MOU with GSA?

## Prepare for Task Orders

Can you  
respond to a  
sizeable task  
order in 7 days?



Templates



Logos



Anchor Graphics



Pricing



Customer Intelligence

Q&A

Thank You!



Jacob Bertram

Principal Consultant,

Lohfeld Consulting Group

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