



**Department of Veterans Affairs (VA)
Office of Acquisition Operations (OAO)**

**Customer Engagement Guide
(*version 1.0*)**

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Table of Contents

<i>Introduction</i>	2
<i>VA's Acquisition Guiding Principles</i>	3
<i>Customer Bill of Rights</i>	4
<i>Customer Planning Meeting (CPM) and Forecasting</i>	6
<i>Planning and Procurement Insight</i>	6
<i>Forecasting and Budgeting</i>	6
<i>Increasing the Quality of Procurement Artifacts</i>	7
<i>Working the Procurement Package</i>	7
<i>Federally Funded Research and Development Center (FFRDC)</i>	8
<i>Customer Training</i>	9
<i>Market Research and Vendor Engagement</i>	11
<i>Continuous Follow-Up</i>	11
<i>Survey the Customer and Constructive Changes</i>	11
<i>Customer Engagement Process Map</i>	13
<i>Version History</i>	14

Introduction

This guide is designed to aid you as you plan procurements with your customers. The focus of this guide is to be *proactive* as opposed to *reactive* by meaningfully engaging the Customer early and often in the acquisition process. Speaking with customers to gain an upfront understanding of their needs is critical. Customer service as a whole is vital to the success of any support organization, and being able to openly and regularly engage with your customer base is a key ingredient to success.

This guide also contains: 1) VA Acquisition Guiding Principles, to stress the importance of having a strong enterprise strategic vision when working with customers, and 2) OAO's Customer Bill of Rights, to refresh OAO employees on the significance of forming sound business partnerships with the customer base. Both documents provide a strong foundation for acquisition principles and tie directly back to customer engagement.

/s/

Phyllis Bower
Executive Director



VA's Acquisition Guiding Principles

One of the keys to a successful acquisition operation is a strong foundation from which to base all acquisition efforts. VA Acquisition Guiding Principles provide that strong foundation ensuring the enterprise strategic vision is guided by sound program management principles resulting in proper procurement execution. These VA Guiding Principles represent a concise, user-friendly statement for everyone within the VA acquisition community. Each member of VA's acquisition community has a responsibility to use these principles when making decisions to ensure each delivery of products/services is in the best interest of our Veterans, taxpayers, and all VA employees.

VA's Acquisition Guiding Principles are as follows:

- a) Conduct business with integrity, fairness, and openness;
- b) Good requirements make for good contracts;
- c) Decisions should be delegated to the lowest appropriate level;
- d) Industry engagement enables better proposals and better execution;
- e) Speed matters;
- f) Competition is our default strategy;
- g) Commercial products and services should be maximized;
- h) Use of contractors who have a track record of successful past performance or who demonstrate a current, superior ability to perform;
- i) Existing contracts should be used whenever possible; and
- j) Meeting our public policy objectives is important.

VA Acquisition Teams consist of all participants in VA acquisition, including not only representatives from the program management, technical, supply, legal, and procurement communities, but also the internal customers they serve. Each member of the acquisition team must exercise personal initiative and sound business judgment in providing the best value product or service to meet the mission needs. In exercising this initiative, members of the acquisition team may assume that if a specific strategy, practice, policy, or procedure is in the best interests of the Government and is not addressed in the Federal Acquisition Regulation, nor prohibited by law (statute or case law), Executive Order, or other regulation, that the strategy, practice, policy or procedure is a permissible exercise of authority.

Customer Bill of Rights

OAO is a customer-focused organization that prides itself in delivering responsive, tailored service and achieving the best value for customers. OAO believes customers deserve superior service and a great contracting experience. The Customer Bill of Rights describes the vision for a successful partnership between the customer and OAO and communicates clear expectations of both the customer and OAO's role in that partnership. The Customer Bill of Rights reinforces OAO commitment to every customer through acquisition service delivery, superior support, and continuous improvement. The rights are considered equally important and complementary in achieving successful partnership throughout the acquisition lifecycle. Both customer rights and OAO's expectations are described below.

Our customers have the right to expect:

1. Service that meets or exceeds expectations
OAO develops and delivers quality acquisition services, value, and outcomes that meet or exceed our customers' expectations.
2. Professional, courteous service
OAO sustains customer satisfaction through personal accountability, professional commitment, and employee empowerment at all levels of the organization. We treat all customers with respect in each and every interaction.
3. Trusted advice throughout the acquisition lifecycle
OAO provides customers with forward-thinking acquisition expertise to fulfill business needs and ensure mission accomplishment. Expect to receive trusted procurement-related advice.
4. Results-oriented service
OAO delivers results, not just processes, to ultimately achieve VA's mission of serving Veterans. Customers are entitled to prompt, efficient, transparent, and easily accessible acquisition services.
5. Requirements contracted according to OAO standards
OAO fulfills customer requirements in accordance with OAO's Procurement Administrative Lead Time (PALT) standards and timeframes. Customers receive advance notification when mutually-agreed upon timelines cannot be met and adjustments are required.
6. Responsiveness to issues and concerns
OAO employees connect customers with the help they need. OAO's goal is to efficiently and amicably respond to customer inquiries within one business day. Customers have the right to submit an inquiry with the expectation of receiving a timely response and resolution.

7. Issues to be heard
OAO recognizes that your issues matter. Customers have the right to be heard directly by the managers responsible for their acquisition service delivery.
8. A knowledgeable, capable workforce
OAO commits to an organizational culture that provides professional development training and opportunities to ensure its acquisition professionals have the skills and competencies to make sound decisions and advise their customers accordingly.
9. Help navigating the acquisition partnership
OAO pledges to provide outreach programs to educate the customer in their roles and responsibilities and empower them by providing tools and processes to support the procurement process.
10. Expert guidance in the development of quality acquisition packages
OAO pledges to continually and clearly share acquisition policies, processes, and templates to assist customers in navigating changes in the Federal acquisition landscape. OAO works collaboratively with customers throughout the acquisition lifecycle.

To continue to be a valued customer, OAO's customer base must:

- Understand they are critical members of the acquisition team and must complete their part in the process in a timely manner and dedicate the appropriate resources to ensure success throughout the procurement lifecycle, including post-award.
- Work with the OAO Team to make the acquisition service experience a success, and, in particular, provide complete acquisition and requirements documents to ensure the OAO Team spends less time "fixing" and more time working toward award of the contract.
- Recognize their responsibility as the owner of the technical evaluation process and deliverable and provide the essential documentation for the result and supporting rationale.
- Promptly provide OAO with specific and constructive feedback on the quality of service.

Customer Planning Meeting (CPM) and Forecasting

Planning and Procurement Insight

Early customer outreach begins when the customer enters a project/requirement into the Virtual Office of Acquisition (VOA) Customer Acquisition Portal module. VOA entry ensures all OAO procuring offices have visibility on the number of actions that need to be executed which in turn, supports the allocation and assignment of OAO resources in a strategic manner.

Upon review of the acquisition request submitted to the VOA, the action will be assigned to an OAO team to support the project during the Acquisition Requirements Package (ARP) refinement process through contract award. The ARP refinement process is discussed in step #4 of the Customer Engagement Process Map (see page 13).

Additionally, Customer Planning Meetings (also referred to as “customer lockdowns”) between the customer and acquisition activity to plan procurements for the current fiscal year are highly encouraged. Although not mandatory, the CPM is a sound business practice that should be done at least once early in the fiscal year, and follow-up should be done as needed. During the first quarter of each fiscal year, OAO and their customer base will establish a schedule to meet in order to assess planned acquisition actions for that fiscal year in conjunction with the customer’s approved budget operating plan. OAO shall engage their customers early in the first quarter to complete the following:

- Identify and analyze workload already in process;
- Review contracts planned to expire during the fiscal year and whether or not a follow on contract action is required;
- Discuss options under existing contracts available for exercise during the fiscal year
- Discuss new planned acquisitions

A line-by-line review shall be conducted of all actions to verify the need for new requirements, follow-on contracts or option exercise, available budget to support the acquisition, and establishment of the required timeline for submission of documentation to support timely execution of the contract action to preclude any break in service to the customer. This planning serves as the execution baseline for the balance of the fiscal year and is monitored and revised collaboratively and as necessary to account for program and budget execution changes.

Forecasting and Budgeting

OAO contracting offices strive to be in tune with their customers and work collaboratively to help them plan their acquisitions in accordance with their budget. It is ultimately the customer’s responsibility to manage their own budget, but contracting offices can and should be proactive in using a customer’s Prioritized Program Budget Operating Plan as the primary tool for forecasting program/contract requirements.

It is imperative that both OAO and its customers communicate milestones and agree on timeframes so both parties have accurate, realistic expectations. This will also enable OAO Managers to review requirements in a holistic manner and try to group like-items and solicitations, saving both time and resources. Once jobs are entered into VOA, regular (weekly or bi-weekly) dialogue take place to ensure contractual milestones are being met and schedule risks mitigated. Depending upon the urgency, complexity etc. for the supply or service, OAO employees should right-size the frequency of communication. This is especially true for requirements entered into the VOA in the first quarter, when the need for award or option exercise may not be until the third or fourth quarter.

Additionally, OAO leadership shall support customer budgetary planning sessions and support the execution of various high level Department initiatives. This shall include supporting acquisition and Program Planning, Budget and Execution (PPBE) process planning sessions, Operating Plan reviews, and lockdown events to ensure holistic acquisition planning.

Increasing the Quality of Procurement Artifacts

Working the Procurement Package

Once assigned in the VOA, OAO will evaluate packages received and work collaboratively with the customer to improve the quality of the package. OAO will directly engage with the customer in the development of requirements documentation. OAO shall provide necessary resources that will provide assistance in the preparation of the requirements document (Performance Work Statements (PWS)/Product Description (PD)/etc.) and other pre-solicitation documentation. In addition, OAO personnel shall participate in acquisition strategy sessions to provide customers with a holistic approach to requirements development. When required, OAO shall support VA's mission through participation in Integrated Product Teams (IPTs) for purposes of improving customer requirements and budgetary planning. OAO Contracting staff shall regularly assist customers in preparation of requests for information, market survey notices and other market research activities. OAO shall also assist the customer by securing and evaluating industry responses and capabilities to satisfy VA needs in order to finalize VA's requirements documentation.

In refining customer procurement documents, it is important to know that OAO serves in an advisory role, not as the requirement owner. Customers require varying levels of support based upon experience and skillsets and OAO strives to work with each customer to tailor the level and breadth of support they need.

Procurement Acquisition Lead Time (PALT) can be impacted by the quality of artifacts submitted by OAO customers, and it is highly encouraged that customers be educated on PALT and the importance of submitting complete, clear and accurate procurement documents.

During this phase it is also important to assist customers in conducting market research, when applicable, as well as providing guidance for engaging with industry if needed. Industry engagement might include hosting one-on-one informational sessions or pre-solicitation conferences for larger,

more complex buys. Although industry engagement is a separate activity in itself, from time to time it overlaps with customer engagement and OAO needs to be aware and involved in assisting customers when engaging contractors.

Federally Funded Research and Development Center (FFRDC)

As VA contracting professionals who provide guidance and support to our customers, it is important to have a general knowledge of different acquisition strategies and be able to share those strategies with our customer base. VA contracting professionals should be knowledgeable of FFRDC and should point customers in the right direction if/when they have a need where an FFRDC might be utilized.

FFRDCs are independent, not-for-profit entities sponsored and funded primarily by the United States Government to meet specific long-term technical needs that cannot be met by any other single organization. FFRDCs are managed by a nonprofit parent organization in accordance with statutory and regulatory rules. An FFRDC provides high-quality research, systems engineering, and analytical work that is within the mission and purpose of its sponsorship and contracted scope. FFRDCs are prohibited from competing with commercial contractors on a competitive solicitation and cannot develop or produce a system.

The nature of its mission requires that the FFRDC operate in a “strategic relationship” with its sponsors. The long-term strategic relationship between the Government and an FFRDC is encouraged to enable the FFRDC to develop and maintain an in-depth knowledge of its sponsors’ programs and operations; maintain continuity and currency in its special fields of expertise, maintain a high degree of competencies in its staff and work; maintain its objectivity and independence so as to provide guidance and advice that is unbiased and free from conflict; and respond to the emerging needs of its sponsors. VA’s FFRDC Governance Plan provides guidelines and procedures for ensuring compliance with the government-wide policies set forth in the Federal Acquisition Regulation (FAR) 35.017, titled “Federally Funded Research and Development Centers” and with the Agency’s Sponsoring Agreement. The Governance Plan defines the Department of Veterans Affairs (VA) policies and procedures for managing and using Federally Funded Research and Development Centers (FFRDCs) across VA and provides a process to leverage expertise from other Federal Agencies’ FFRDCs.

The VA Governance Plan for use of an FFRDC applies to all administrations and staff offices within VA that seek to use the services of an FFRDC, are able to demonstrate that the requirement falls within the core competencies of the FFRDC (to include FFRDCs sponsored by other Government agencies), and can justify that the work cannot be performed as effectively by existing in-house, other not-for-profit, or for profit contractor resources. Customers may seek services under a FFRDC, and OAO employees should point potential FFRDC users in the right direction.

The process for placing a requirement with a FFRDC is slightly different than going out to a contractor. The first step should be to contact VA’s FFRDC Customer Service Manager (CSM)

listed below and have the customer enter their requirement into the VOA. The VA FFRDC CSM will schedule an Acquisition Integrated Process Team (AIPT) with the requiring activity for an appropriateness determination. During the AIPT, the requiring activity will provide a summary of its requirement to include scope, period of performance, and a rough order of magnitude. In addition, the requiring activity will provide justification as to why the requirement is appropriate for an FFRDC. Is the requirement within the core competencies of the FFRDC? Does the requirement require the “special relationship” of an FFRDC? Is the requirement “strategic” in nature? The AIPT will further review descriptions of work to ensure that this work could not be appropriately performed by a commercial contractor.

As far as procurement documentation, customers will need a PWS, security checklist, IGCE, QASP, Request and Justification (R&J), Advisory and assistance request, inherently governmental functions and a funding document. An Acquisition Plan is not required, as the Acquisition Plan was approved at the contract level. For all questions regarding FFRDC and the required artifacts, please contact: Customer Service Manager Rosemary Luisi, (732) 440-9723, Rosemary.Luisi@va.gov.

Customer Training

OAO endeavors to provide its customers with a variety of training opportunities specific to the acquisition process and documentation. OAO employees should be aware of all the training available to customers and be able to make recommendations on what classes or events may be beneficial to them. OAO employees strives to tailor the training needs and recommend longer, in-depth courses for individuals with little to no experience and shorter, refresher type training for those with more acquisition experience. OAO employees shall also assist customers with locating applicable templates on the VOA. A sample of available training offered by OAO is provided below.

OAO Customer Advocacy Service – Customer Training

The table below represents OAO customer training modules. Each module is 1 hour and provided via Live Meeting. The presentation schedule is located on OAO’s Customer Advocacy Service site ([Customer Advocacy Service Training Schedule](#)) and registration is available through TMS.

Course Title	Description
A Customer’s Guide to Writing Requirements (SOO/SOW/PWS)	A comprehensive look at the anatomy of a requirements topic. Includes tools for determining need; choosing the appropriate document (SOO/SOW/PWS) for the requirement; and expectations of OAO contracting offices.
Market Research - Look Before You Leap	A seminar on conducting market research, the benefits of doing market research and effective use of Requests for Information (RFIs).
Preparing an Independent Government Cost Estimate (IGCE)	Using market research to prepare the IGCE.

Course Title	Description
Technical Evaluation Team Roles and Responsibilities	Overview of the technical evaluation process including the customer's role and responsibilities; also provides dos and don'ts when participating in an evaluation team for a requirement.
Acquisition Planning	Planning the acquisition and choosing the best evaluation criteria for the requirement.
Technical Evaluation Team - You've reviewed, now what?	An in-depth look at how to prepare a technical evaluation report.
After the Contract is Awarded	A review of the program office's role and responsibilities when managing a contract.
Contracting for Conferences or Events	Explains the process for awarding contracts for a conference or event and how to avoid the pitfalls in today's environment.
Purchase Card Training	A supplement to agency training, OAO-led instruction on roles, responsibilities, warrants, and unauthorized commitments

VA Acquisition Academy (VAAA) Contracting Officer's Representative (COR) Training

VAAA COR Training is a comprehensive course which addresses the acquisition process as well as contract administration from the perspective of the technical manager (the COR). Students have opportunities to learn and practice the duties of the COR and Contracting Officer (CO). This comprehensive course is valuable to anyone involved in the acquisition process at any level. However, the primary target group is those individuals with the potential for formal designation as a COR.

Course Length: 8 class days (4 hours per day)

VA Employee Course Cost: TMS Online

For the course schedule or more information, visit the [VA Acquisition Academy's PPM School](#) website and select COR certification.

Technology Acquisition Center (TAC) Customer Training

This training provides an overview of the TAC organization and teaches their processes and commonly used contract vehicles. Customers learn how to submit an acquisition request, how to use the Virtual Office of Acquisition (VOA) Customer Portal, and how to complete the necessary documents for an actionable acquisition package, i.e., Performance Work Statement (PWS), Product Description (PD), Acquisition Plan, Evaluation Plan, Market Research, Independent Government Cost Estimate (IGCE), and Quality Assurance Surveillance Plan (QASP). The TAC also provides training on Competition Management and how it applies to the acquisition process.

Course Length: 2 class days (8 hours day one and 6 hours day two)
VA Employee Course Cost: TMS Online

This instructor-led training is hosted on-site at the TAC in Eatontown, NJ. All other locations will be connected via Video Teleconference (VTC) System.

Market Research and Vendor Engagement

One aspect of customer engagement which should not go unnoticed is assisting customers with conducting market research and engaging with the vendor community. OAO organizations are encouraged to host Advanced Planning Briefing to Industry (APBI) events and Industry Days during which VA customers' projected short-term business opportunities and long-term strategies for requirements and projects are presented to industry. The APBI is a great tool to use to inform industry of upcoming VA requirements and it gives customers an avenue to conduct market research to see what solutions are available.

Continuous Follow-Up

Historically, OAO receives the majority of requirements for execution during the 3rd and 4th quarter of a given fiscal year. Soliciting a large volume of requirements in the 3rd and 4th quarter is not a sound business practice. This practice can limit resources available to review and award actions in a timely manner. Industry may be forced to pick and choose opportunities, while possibly avoiding or missing important opportunities due to lack of time or resources.

OAO strives to be extremely aggressive in reminding customers that early submittal of requirements is beneficial to all concerned, and that this is a partnership. The frequency of these communications may vary (daily, weekly, monthly, etc.) depending on how well things are progressing. Early submission of requirements helps to ensure acquisition resources are available and customer timelines are met.

Survey the Customer and Constructive Changes

In order to remain a strong organization, OAO must keep customers engaged in the acquisition process. Customer feedback helps OAO identify challenges that customers face during the acquisition process, measure customer satisfaction and obtain valuable insight on how to improve customer service. In order to deliver a great experience that builds a loyal and satisfied customer base, OAO listens and responds to customer feedback. OAO's customers are a wealth of information; helping OAO to provide better service and deliver a more valuable product to VA's customer bases.

To measure how OAO employees are meeting customer expectations and needs, OAO seeks customer feedback via customer surveys.

Customer Survey System - Post-Award Questionnaires. Customer feedback is an essential component in OAO's tool kit. OAO business practices rely on feedback from every VA customer. This tool enables customers to provide immediate feedback regarding the quality of their experience and level of satisfaction with respect to OAO's acquisition support.

Survey Feedback guides better business decisions. Regardless of whether it's good or bad news, OAO values all customer feedback. Surveys identify dissatisfied customers And by gathering customer feedback OAO can identify customers that are not 100% satisfied and make constructive changes.

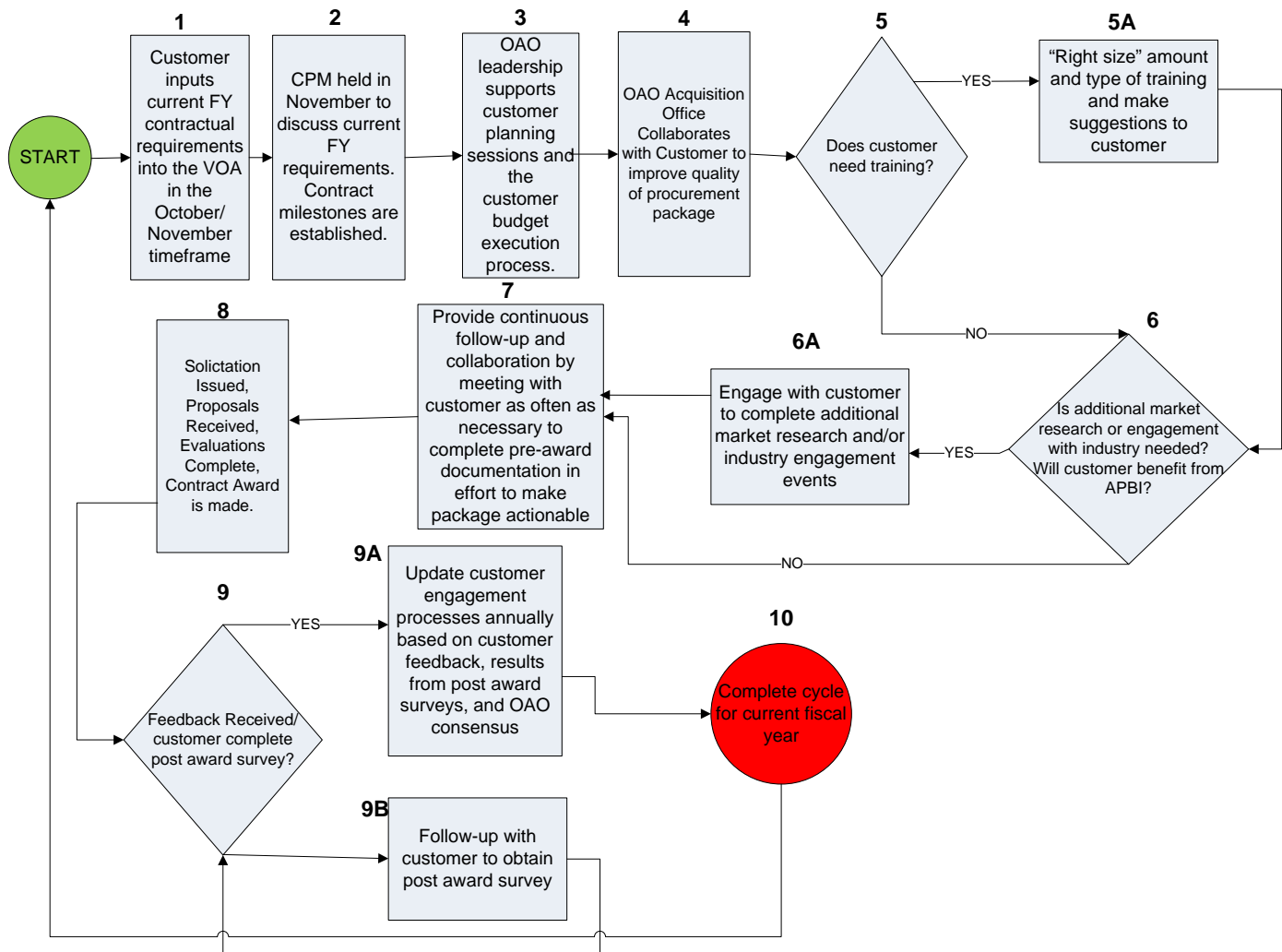
Surveys stop recurring problems. Customers tell it like it is. OAO uses this feedback to quickly and proactively solve the problems by implementing corrective actions that could potentially affect other customers.

OAO strives to expand upon the goodwill created with its customers and seeks out additional contracting opportunities with repeat organizations. OAO will also market its own capabilities to other interested and similar parties. OAO engages in email and bulletin board campaigns throughout VA in order to demonstrate its capabilities. When feasible OAO also conducts site visits to determine customer needs and explain OAO's capabilities.

OAO establishes dialogue with customers through face-to-face meetings, virtual meetings, site visits, or industry days to assist in developing and maintaining a strong working relationship with each customer.

Customer Engagement Process Map

U.S. Department of Veterans Affairs
Office of Acquisition Operations
Customer Engagement Flowchart 1.0



1. OAO contracting office will gain visibility of requirement when customer inputs into the VOA.
2. Customer Planning Meeting held with customer early in the FY to discuss requirements and establish contractual milestone dates.
3. OAO participates in customer planning events and customer budget execution meetings/events.
4. The OAO contracting office and the customer work collaboratively to complete all required procurement documentation
5. OAO employees should recommend training to customer based on their experience and skills in generating procurement artifacts. Recommending training can be done at any step in the process.
6. If additional market research is required or the project may benefit from engagement with industry, OAO contracting office shall collaborate with customer and industry and serve as facilitator.
7. Continue working with customer to finalize procurement package and bring package to actionable state.
8. Once package is actionable, requirement gets solicited, proposals get evaluated, and contract award is made.
9. Following contract award, OAO contracting office shall obtain a copy of the post award customer survey. Annual changes to customer engagement process shall be made on an annual basis based off of customer feedback and consensus within OAO.
10. Process ends for current FY and begins at the start of the next FY

Version History

Template Version #	Version Description	Release Date
1.0	Initial Release	June 7, 2016