Bureau of the Fiscal Service

FM QSMO VENDOR GUIDANCE
SIN 518210FM

Financial Management Quality Service Management Office (FM QSMO) Core Financial Management (FM) Solutions and IT Professional Services

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It will be updated periodically to provide additional clarity or information.

What is the FM QSMO SIN?

The Financial Management Quality Service Management Office (FM QSMO) Special Item Number (SIN) *518210FM*, within the General Services Administration (GSA) Multiple Award Schedule (MAS) contract vehicle, provides Federal agencies with access to the commercial solutions and services of the FM Marketplace and is the mechanism through which agencies procure these solutions/services. SIN 518210FM is comprised of four (4) subgroups, as follows:

1. Core Financial Management Solutions (Core FS)
2. Additional Financial Management (FM) Solutions
3. Financial Management (FM) Solution/Service Adoption and Transition Services
4. Financial Management (FM) Technology Operations Support Services

Why is the FM QSMO SIN of interest to vendors?

The FM Marketplace is the first stop for agencies looking to acquire FM solutions and services. OMB Memorandum M-19-16, *Centralized Mission Support Capabilities for the Federal Government*, corresponding *Investment Planning Guidance* released by GSA's Office of Government-wide Policy, OMB Circular A-123 Appendix D *Management of Financial Management Systems – Risk and Compliance*, Executive Order *14249 Protecting America's Bank Account Against Waste, Fraud, and Abuse*, and OMB Circular A-11 *Preparation, Submission, and Execution of the Budget* direct agencies to engage with the FM QSMO prior to developing plans and issuing solicitations for FM technology or services and to use solutions available through the FM Marketplace.

To meet agency demand, participation of qualified vendors in the FM Marketplace is critical. Solutions/services offered by vendors awarded SIN 518210FM are showcased in the FM Marketplace Catalog.

What do vendors need to know before they apply for the FM QSMO SIN?

The FM QSMO, in collaboration with federal and industry stakeholders, has developed the Financial Management Capability Framework (FMCF). The FMCF includes standards and capabilities that define baseline needs and requirements for solutions/services in the FM Marketplace.

The FMCF consists of nine (9) components, the details of which can be accessed on the FM QSMO's *FMCF webpage*. Also available is the *Guide to the FM Marketplace*, which provides an overview of how the FM QSMO operates and how the FMCF applies to solutions/services in the FM Marketplace.

The FMCF serves as contractual requirements of the FM QSMO SIN. Vendors interested in providing commercial solutions/services in the FM Marketplace through SIN 518210FM are required to document, and for Core FS Solutions demonstrate, compliance with applicable components of the FMCF.

The FM QSMO conducts an evaluation of the technical elements of vendor submissions in response to SIN 518210FM to assess compliance at the FM Marketplace entry level.

How do vendors apply for the FM QSMO SIN?

Understanding the GSA MAS Program is essential to participating in the FM QSMO SIN. Information, guidance, and resources are available to both new offerors and existing MAS contract holders through the *GSA Vendor Support Center*.

1. Get Ready

Review SIN 518210FM to determine what solutions/services are within scope, and under which subgroups they best align.

Review the Guide to the FM Marketplace, components of the FMCF, and related resources (e.g., *FMCF 101 Training*) to gain an understanding of the required standards and capabilities for commercial solutions/services under SIN 518210FM.

2. Prepare Submission Package

In addition to administrative, technical, and pricing offer submission elements required by the GSA *MAS solicitation* and IT Category attachment, vendors must be responsive to the additional instructions and technical submission elements of SIN 518210FM.

What's included in an FM QSMO SIN-specific submission package?

A complete and responsive vendor submission package for SIN 518210FM includes the following:

a. Documentation for proposed offerings using the *FM Solution/Service Definition Template* (multiple offerings can be documented as individual tabs within a single copy of the template).

b. Technical narrative responses addressing the FM Marketplace entry level evaluation criteria (i.e., self-evaluation/assessment and/or attestation) using the *Technical Narrative Response Template*.

c. Volume of any supporting documentation referenced in the FM Solution/Service Definition Template, Technical Narrative Response Template, and Core FS Pre-Built BIE Response Template (if applicable), including a listing of the documentation provided (e.g., existing solution end- user documentation, existing vendor program/process documentation).

If applicable (submissions including Core FS Solutions):

d. Technical narrative responses addressing the Core FS business information exchange (BIE) capabilities using the *Core FS Pre-Built BIE Response Template*.

e. Volume of required sample reports and BIE files as indicated in the *Core FS OCD Execution Plan*, including a listing of the documentation provided.

Further instructions for completing the FM QSMO templates are provided in the respective documents.

3. Submit Package

Vendors must submit offers and/or modification requests in response to SIN 518210FM using the *GSA eOffer/eMod* online submission too

How are vendors evaluated for the FM QSMO SIN?

Like other SINs under the GSA MAS Program, and as outlined in the GSA MAS solicitation and the IT Category attachment, GSA's Federal Acquisition Service (FAS) evaluates the general administrative, technical, and pricing elements of vendor submissions.

The FM QSMO is responsible for evaluating technical elements of vendor submissions specific to SIN 518210FM. The *FM Solution/Service Evaluation Criteria* component of the FMCF is used by the FM QSMO when evaluating vendors and offerings for compliance.

Vendors and offerings are not evaluated by the FM QSMO for all categories/criteria up front; only for those marked as being assessed at the FM Marketplace entry level. Not all evaluation categories/criteria apply to every solution/service offering (e.g., the Technology Design evaluation category does not apply to offerings that do not include technology).

For each evaluation category/criteria, vendor submissions are rated as "Acceptable" or "Unacceptable" based on review of documentation and/or demonstration of compliance with applicable components of the FMCF.

1. FM QSMO Technical Narrative Response Evaluation

For all vendors and all proposed solutions/services, the FM QSMO conducts an evaluation of technical narrative responses.

The FM QSMO evaluation of vendors' technical narrative responses consists of review for up to five (5) criteria categories as follows:

a. **Business** – Evaluates the ability to achieve FM business outputs and outcomes using the FM solution/service

b. **Technology Design** – Evaluates the FM solution/service's technical architecture and design for servicing customers

c. **Technology Operation** – Evaluates the FM solution/service's ability to respond to user demand and changes needed in the FM solution/service

d. **Programmatic** – Evaluates a provider's strategy and management of service offerings and delivery

e. **Organizational** – Evaluates a provider's organizational ability to deliver quality FM solutions/services and ensure customer satisfaction

For proposed Core FS Solutions, the FM QSMO also reviews documentation and evidence to support technical narrative responses and compliance with all components of the FMCF.

2. FM QSMO Core FS Operational Capability Demonstration (OCD) Evaluation

For proposed Core FS Solutions, the FM QSMO conducts an OCD evaluation.

The FM QSMO uses a phased approach to evaluating Core FS Solutions wherein failure to obtain acceptable results during the technical narrative response evaluation results in a submission not moving on to the subsequent OCD evaluation.

Upon determining acceptable results from the technical narrative response evaluation, the FM QSMO contacts the vendor to schedule the OCD.

FM QSMO evaluation of Core FS OCDs includes both the live demonstration by vendors and review of the OCD reports and BIE files. Core FS OCDs follow six (6) business scenarios based on Federal Integrated Business Framework (FIBF) Federal Financial Management (FFM) use cases, functions and activities, and system requirements.

Core FS OCDs are conducted using vendor-maintained instances of the proposed solutions in vendor-provided environments and are limited to not more than eight (8) hours. Vendors have the flexibility to conduct the OCD in a single day or across two consecutive business days within the same week.

Vendors use the sample data and correlation points provided in the Core FS OCD Execution Plan and follow the scenario outlines and use case steps to execute their Core FS OCDs.

The six (6) business scenarios are further detailed in the Core FS OCD Execution Plan and are as follows:

i. Purchased and Leased Assets
ii. Grants Disbursement and Closeout
iii. Temporary Duty (TDY) Travel
iv. Intragovernmental Buy/Sell Activity
v. Vendor Refund Receivable
vi. Government Sale of Pre-paid Goods

Reference the *Core FS OCD Quick Reference Guide* to prepare for the OCD.

Review the FM QSMO *Vendor Onboarding Training* to gain further understanding of how vendors and solutions/services are evaluated for SIN 518210FM.

What happens after vendors are evaluated for the SIN?

When evaluation of the technical elements is complete, the FM QSMO provides the results and a recommendation to GSA, who makes the final award decision. Once the SIN is awarded, vendors are added to the *FM Marketplace Catalog* and may participate on opportunities in the FM Marketplace. Agencies will satisfy fair opportunity and conduct further evaluation of vendors and solutions/services at the agency acquisition level.

What are the ongoing compliance requirements for vendors on the SIN?

The FMCF is updated periodically to reflect changing policy and other requirements. Existing Marketplace vendors are required to maintain compliance with FMCF updates. As FMCF updates are released, the FM QSMO will provide specific instructions to vendors. Vendors may be asked to provide a self-attestation, submit written documentation, and/or demonstrate additional capabilities based on the updates in a given release.

For additional information and resources, please visit the FM QSMO website or email fmqsmo@fiscal.treasury.gov.