

SPAWAR TASK/DELIVERY ORDERING GUIDE FRAMEWORK

Key Considerations for Contracting Officers Establishing an Ordering Guide for Multiple Award Contract (MAC) Vehicles

Purpose: To assist Contracting Officers in creating an Ordering Guide for MACs.

Beginning 16 December 2015, and in support of the requirement at [FAR 16.505\(b\)\(1\)\(ii\)\(A\)](#) for order placement procedures, an ordering guide must be developed for any new Multiple Award Contracts (MAC) at the time the basic contracts are awarded to aid the team, customers, and ordering officers in the subsequent task/delivery order process. At the discretion of the Contracting Officer, an ordering guide may also be created for existing MACs. The information below is representative of the types of information that should be considered for inclusion within the guide.

- ❖ **Contract Scope.** This section is intended to explain the type of work that can be accomplished under the contract and any relevant parameters, consistent with the original solicitation, Performance Work Statement (PWS), Statement of Objectives (SOO), or Statement of Work (SOW). This information should aid others in understanding what work can be accomplished within the scope of the MAC, and what cannot, the minimum order requirements, and available contract types.
- ❖ **Authority.** This section should address whether the ordering will be decentralized across numerous ordering officers or centralized to a single Contracting Officer. If allowing ordering officers, state how permission/authority will be granted to issue orders, any limitations on their authority, and any performance or reporting expectations that apply. Contracting Officers must maintain a log of who is authorized to order on the contract, this may be delegated to the Contracting Officer's Representative.
- ❖ **Ordering Instructions.** This section may include, but is not limited to, the following:
 - **Acquisition Strategy.** Address Summarize the acquisition strategy that was used for the basic contracts and the strategies that were anticipated to be used at the task/delivery order level, such as performance based, best-value selection, use of oral presentations, multi-phased approach, etc.
 - **Market Research.** Describe to what extent market research will be required under the ordering process, for example to verify that the planned task/delivery order is within scope or to determine if the task/delivery order will be limited to small businesses (16.505(b)(2)(i)(F)).
 - **Fair Opportunity.** Describe the procedures that will provide each awardee a fair opportunity to be considered for each order and that reflect the requirement and other aspects of the contracting environment. Address how to handle any orders that are not provided on a fair opportunity basis in accordance with FAR Subpart 16.505(b)(1) and (b)(2).
 - Address the typical source selection criteria that should be used at the task/delivery order level (e.g. technical approach, key personnel, past performance, etc.).
 - **Timelines.** Address the notional timelines for various types of planned orders, based on level of complexity, the amount of time the contractors should be given to make informed decisions to respond to potential orders, and the minimum time the contractors must be given to submit proposals.
 - **Requirements Documentation.** Address any specifics that are necessary to be stated in the requirements documents for each task/delivery order. In some cases, the Contracting Officer may wish to provide a template or sample of specific document sections identifying required/suggested language.
 - **Independent Government Estimate (IGE).** Provide guidance on the minimum requirements for each IGE, to include a narrative explaining how the estimate was derived. If possible, provide templates to aid the team in preparing IGEs and ensuring consistency across task/delivery orders.
 - **Business Decision Documentation.** Describe or provide templates for the business clearance documentation required for each task order, including identifying any specific clauses or provisions that should be addressed depending on the type of order, any specific formats or instructions for cost/price analysis and cost realism, responsibility checks, etc.
- ❖ **Contract Administration.** This section should describe any required reports necessary during contract administration (e.g., Contractor Performance Assessment Reporting System (CPARS), Subcontracting Reporting Information, Contract Funds Status Reports (CFSR), Security Reports, etc.). The points of contact should be identified and their roles and responsibilities on the task/delivery order.
- ❖ **Invoice Instructions.** In this section, provide any specific instructions for invoicing.
- ❖ **Closeout Process.** This section should identify how/when the orders will be closed and the respective roles and responsibilities of those involved in the process.