



MEMORANDUM FOR BUREAU CHIEF PROCUREMENT OFFICERS

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SUBJECT: Implementation of Office of Management and Budget's (OMB) memorandum entitled, Acquisition 360 – Improving the Acquisition Process through Timely Feedback from External and Internal Stakeholders requirement.

- 1. Purpose:** This Acquisition Procedures Update (APU) is issued to revise the Department of Treasury Acquisition Procedure (DTAP) in order to implement the requirements established by the subject OMB memorandum.
- 2. Effective Date:** April 27, 2015
- 3. Expiration Date:** Until otherwise canceled, superseded or included within the FAR or a future edition of the DTAP.
- 4. Background:** OMB issued a memorandum on March 18, 2015 entitled, [Acquisition 360 – Improving the Acquisition Process through Timely Feedback from External and Internal Stakeholders](#), which requires Agencies to implement surveys for soliciting actionable feedback from external and internal stakeholders. This OMB initiative is not intended to replace any general agency customer satisfaction surveys nor is it intended to be used to rate individual contracting officers, program managers, or integrated project teams (IPTs), or to compare procuring offices generally, as the complexity of procurements varies greatly among agencies, and unexpected challenges can arise. Instead, it is to provide agencies a mechanism for agencies to collect data and information that can be used to improve its performance in early vendor engagement efforts and internal acquisition practices; thereby leading to better program results.

OMB is requiring, within one month of the date of the memorandum, agencies to identify at least two of their largest contracts or orders for complex IT development, systems, or services awarded within the past six months and to conduct a retroactive survey for both of these awards. In addition, is requiring agencies to conduct surveys for the lesser of 50 or 5% of new awards for complex information technology (IT) development, systems, or services that are awarded during the remainder of FY15. Therefore, to meet the requirements established by this OMB memorandum, the Senior Procurement Executive (SPE) has determined that the issuance of an amendment to the DTAP is necessary.

The purpose of this amendment to the DTAP is to establish Treasury's policy and procedure in implementing these requirements, and thereby establish a defined process for Treasury to solicit actionable feedback from external and internal stakeholders. Within the memorandum, OMB has established three separate surveys that are to be used by agencies. They are: (i) Pre-Award & Debriefing Satisfaction Survey (which is completed by offerors in order to rate the



agency); (ii) Evaluation of the Contracting Operation (which is completed by the program office in order to rate the contracting operation); and (iii) Evaluation of the Program Office's Participation in the Procurement (which is completed by the contracting officer in order to rate the program office).

The SPE has designated Mr. Thomas O'Linn as Treasury's OMB point of contract for this initiative. He will be responsible for working with OMB as well as coordinating with each Bureau in the execution of this effort. In addition, the SPE has already identified the two awards for purposes of conducting the retroactive survey required by this OMB initiative. Overall, as this initiative progresses, OMB plans to reevaluate the questions, focus areas, and survey thresholds after the initial results are received in order to determine a way forward in terms of capturing customer feedback efforts; it is therefore highly likely more changes will be made.

5. Department of the Treasury Acquisition Procedures: The DTAP is amended as follows:

A. Add the below subpart as follows.

Subpart 1004.76—Acquisition 360 Surveys

1004.7600 Scope of subpart.

This subpart prescribes policies and procedures for the implementation of the Office of Management and Budget's (OMB) memorandum dated March 18, 2015 entitled, [Acquisition 360 – Improving the Acquisition Process through Timely Feedback from External and Internal Stakeholders](#).

1004.7601 Definitions.

As used in this subpart—

“Complex information technology (IT) development, systems, or services” means acquisitions that involve the acquisition of IT development, systems, or services that meet the following criteria—

- (1) The total estimated value, inclusive of options exceeds \$6,500,000; or
- (2) Supports OMB 300 major investments regardless of dollar value.

1004.7602 Policy.

(a) Successful acquisitions depend on a clear understanding of the market's capabilities and dynamics, and this requires early and meaningful engagement with industry and the application of strong management practices within the agency. OMB has directed agencies to solicit actionable feedback from external and internal stakeholders in order to ensure agencies can continually consider and improve its performance in early vendor engagement efforts and internal acquisition practices.

(b) This initiative is not to be used to rate individual contracting officers, program managers, or integrated project teams (IPTs), or to compare procuring offices generally, as the complexity of procurements varies greatly among Bureaus, and unexpected challenges can arise.



1004.7603 Procedures.

(a) *OPE Responsibilities.* The Office of Procurement Executive (OPE) shall—

- (1) Use the survey templates provided by the OMB memorandum for soliciting feedback from external and internal stakeholders;
- (2) Establish a mechanism for Bureaus to use for purposes of collecting the information and data needed for this effort;
- (3) Designate an individual responsible for coordinating with OMB and the Bureaus;
- (4) Select the acquisitions for soliciting feedback; and
- (5) Use the results to identify best practices and areas within the DTAR or DTAP that can be improved.

(b) *Designated OPE representative responsibilities.* The individual designated by OPE shall—

- (1) Coordinate with OMB and the Bureaus regarding this effort;
- (2) Manage and send out the surveys to the acquisitions selected by OPE;
- (3) Ensure the results are provided to the Treasury's Chief Acquisition Officer, Senior Procurement Executive, and other appropriate agency officials; and
- (4) Submit to OMB the information and data requested.

(c) *Bureau responsibilities.* Bureaus shall—

- (1) Identify a Bureau point of contact for coordinating with OPE on this initiative;
 - (i) The point of contact shall be responsible for ensuring the timely submission of the information and data requested.
- (2) Use the mechanism established by OPE for purposes of identifying acquisitions that meet the definition;
- (3) Submit the information and data requested by OPE within the timeframe requested;
 - (i) Bureaus shall ensure that the information and data submitted is complete, accurate, and current.
- (4) Coordinate with OPE on this initiative; and
- (5) Communicate to their acquisition personnel the requirements, roles and responsibilities, and expectations surrounding this initiative;

(d) *Contracting officer responsibilities.* Contracting officers shall—

- (1) Insert the provision prescribed in 1004.7604; and
- (2) Respond to questions from offerors and program offices regarding this initiative.

1004.7604 Solicitation provision.

The contracting officer shall insert the provision at 1052.204-76, Notification of Acquisition 360 Satisfaction Survey, in solicitations where the acquisition meets the definition prescribed in 1004.7601.



B. Add the below provision as follows.

1052.204-76 Notification of Acquisition 360 Satisfaction Survey.

As prescribed in 1004.7604, insert the following provision:

**1052.204-76 NOTIFICATION OF
ACQUISITION 360 SATISFACTION SURVEY (APR 2015).**

(a) This acquisition has been identified as being a complex information technology (IT) development, systems, or services requirement. As a result, your company may receive a survey pursuant to the Office of Management and Budget's (OMB) memorandum dated March 18, 2015 entitled, [Acquisition 360 – Improving the Acquisition Process through Timely Feedback from External and Internal Stakeholders](#). If you receive a survey, your company is encouraged, but not required to respond. The survey should take no more than ten (10) minutes to complete and the results will not be published or made publicly available.

(b) The Federal Government may not conduct or sponsor, and the public is not required to respond to, a collection of information that does not display a currently valid OMB control number. The OMB control number for this collection is 1505-0231.

(End of provision)

6. Required Bureau Actions: Bureau Chief Procurement Officers shall—

- a. Ensure dissemination of this APU to all impacted personnel and
- b. Update any related Bureau policies and procedures impacted by this APU.

7. Additional Information: My point of contact for this APU is Mr. Thomas O'Linn, who may be reached at thomas.olinn@treasury.gov or at OfficeoftheProcurementExecutive@treasury.gov.