



**Homeland
Security**

FirstSource II Ordering Guide

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Version 3**

**Prepared by the Office of Procurement Operations (OPO)
Enterprise Acquisitions Division (EAD)**

Foreword

FirstSource II (FSII) is a multiple-award indefinite delivery/indefinite quantity (IDIQ) contract vehicle, designed as the preferred source of Information Technology (IT) Value-Added Resellers for commercially-available IT commodities, solutions, and value-added reseller services to support DHS programs in accomplishing their mission. The *FirstSource II Ordering Guide* contains the information required to issue Delivery Orders against the FirstSource II contract vehicle. The FirstSource II contracts are available to DHS, its Components, and any other federal agencies where DHS is acting as the servicing agency.

Questions regarding these guidelines and procedures for placing orders against the contracts should be sent to: FirstSourceII@hq.dhs.gov

Our goal was to keep this ordering guide as short and simple as possible. Therefore, the FirstSource II Ordering Guide only contains the information required to use this contract for obtaining IT products and services throughout DHS. Please refer to the FirstSource II home page: <http://mgmt-opo-sp.dhs.gov/sites/epic/Pages/FirstSource II.aspx> for specific information regarding the following:

- Generic FirstSource II Base Contract (including modifications);
- List of FirstSource II contractors;
- Sample forms and templates (updated periodically); and
- Other data that may be useful in assisting a Delivery Order contracting officer, or requiring activity in completing the necessary paperwork to be submitted with DO solicitations.

1 General Information

1.1 Background

FirstSource II is a suite of indefinite delivery/indefinite quantity (ID/IQ) contracts for IT commodity products and solutions that will enable the Department of Homeland Security (DHS) to accomplish its mission objectives. The contracts are designed to standardize commodities and procurement processes and reduce acquisition lead-times that are required to meet the vast majority of the DHS' enterprise infrastructure needs. The FirstSource II contracts encompass all commercially-available IT commodity requirements, including hardware, software, peripherals, networking, and infrastructure support services.

Firm-Fixed Price (FFP), FFP/Time and Materials or Incentive Delivery Orders may be issued under FirstSource II. FirstSource II is a 100% Small Business Set-Aside in five (5) different socio-economic categories using NAICS Code 541519, Footnote 18; the business size standard is 150 employees.

The five (5) socio-economic categories are:

- 8(a);
- Historically-Underutilized Business Zone (HUBZone);
- Service-Disabled, Veteran-Owned Small Business (SDVOSB);
- Economically-Disadvantaged, Woman-Owned Small Business (EDWOSB); and
- Small Businesses (including SB, non-8(a) Small Disadvantaged Business, non-EDWOSB WOSB, VOSB)

Historically-Underutilized Business Zone (HUBZone), 8(a), Economically-Disadvantaged, Woman-Owned Small Business (EDWOSB), Service-Disabled, Veteran-Owned Small Business (SDVOSB), and Small Business (SB). ***Orders shall only be competed under one socio-economic category, giving each awarded vendor in the category fair opportunity to compete. There are no rules or guidance for which socio-economic category should be utilized, with the final determination being at the discretion of the ordering activity.***

FirstSource II contracts are centrally managed and administered by the Enterprise Acquisitions Division (EAD) within the Office of Procurement Operations (OPO), and Delivery Orders (Dos) may be issued by any warranted Contracting Officer (CO) in DHS.

1.2 Purpose

This document provides guidance for ordering IT commodities and services under FirstSource II contracts, and defines the roles and responsibilities of the key parties involved in the ordering process. The overall responsibility for administration and management of the FirstSource II contracts resides with the Contract level CO.

1.3 Scope

The FirstSource II contracts provide DHS with a wide array of IT commodity products and services; commercial-type pricing; ongoing competition between qualified small business contractors; and ease of use. The IT commodity devices which may be ordered under FirstSource II include small form factor, static, domain, virtual desktop infrastructure (VDI), desktop virtualiza-

tion and peripherals, and any associated value-added reseller services. Any commercially available IT products may be made available through this contract. The associated value-added reseller services provided by FirstSource II include, but are not limited to:

- Configuration consulting and design;
- Systems integration;
- Installation of multi-vendor equipment;
- Customization of hardware and software;
- Training;
- Product technical support;
- Product maintenance; and
- End-user support.

DOs for the FirstSource II contracts will be competed under one of the following five (5) socioeconomic categories:

- 8(a);
- Historically-Underutilized Business Zone (HUBZone);
- Service-Disabled, Veteran-Owned Small Business (SDVOSB);
- Economically-Disadvantaged, Woman-Owned Small Business (EDWOSB); and
- Small Businesses (including SB, non-8(a) Small Disadvantaged Business, non-EDWOSB WOSB, VOSB)

The FirstSource II contracts have a five (5) year base period, and two (2) one-year option periods. The period of performance will be specified in the Delivery Orders and may include an option period which extends the delivery order up to twelve (12) months beyond the expiration of the basic contract.

NOTE: FirstSource II shall not be used to fulfill orders for items that are covered by commodity-specific strategic sourcing vehicles. An example of a commodity-specific strategic sourcing vehicle is a software application for which there exists an Enterprise License Agreement (ELA). A full list of strategically-sourced vehicles can be found at <http://dhsconnect.dhs.gov/org/comp/mgmt/cpo/oss/Pages/StrategicSourcing.aspx>.

1.4 Authorized Users

All warranted COs of the DHS and its Components are authorized Delivery Order COs. Under no circumstances will a DO issued by an authorized DO CO change the requirements of the FirstSource II IDIQ contracts. Should the DO CO require such a change, written approval from the FirstSource II Contracting Officer must first be obtained.

Other Government Agencies (OGA) may use the FirstSource II contracts when obligating DHS funds on behalf of DHS or any of its Components. The DHS Head of Contracting Activity (HCA) having authority for the requirement must authorize the OGA, in writing, to obligate the funds on behalf of that DHS Component – a copy of this authorization must be submitted to FirstSourceII@hq.dhs.gov.

DHS reserves the right to place orders under the FirstSource II contracts for the benefit of other Federal agencies and institutions, where DHS is acting as a servicing agency under an Interagency Agreement or similar agreement, as permitted by law.

1.5 Prime Contractors

FirstSource II contracts were awarded in each of the five (5) socioeconomic categories; the list of prime contractors, as well as their respective contact information, is provided in Appendix A. DOs for the FirstSource II contracts shall only be competed by the DO CO in one of the five (5) socioeconomic categories. Additional contractor information can be obtained via the FirstSource II website: http://mgmt-opo-sp.dhs.gov/sites/epic/Pages/FirstSource_II.aspx.

1.6 FAR and FASA Relationship to FirstSource II Contracts

The Federal Acquisition Streamlining Act (FASA) has established a "general" preference for the use of multiple awards, and in doing so:

- Authorizes exemption from the public notice requirement when placing orders;
- Limits protests in connection with the issuance of orders except on the grounds that the order increases the scope, period, or maximum value of the contract or an order valued in excess of \$10 million; and
- Mandates that multiple awardees have a fair opportunity to be considered for orders in excess of \$3,000.

Pursuant to Federal Acquisition Regulation (FAR) requirements, FirstSource II requires that each Contractor within the selected socio-economic category be provided a fair opportunity to be considered for individual DOs, unless one of the exceptions cited at FAR 16.505 applies.

2 Roles and Responsibilities

The following subsections describe the roles and responsibility of the Enterprise Acquisition Division (EAD) as the primary points of contact (POC) on matters regarding FirstSource II contract management and administration, as well as other pertinent information.

2.1 Enterprise Acquisitions Division (EAD)

The EAD was established to focus on the award and management of the enterprise-wide acquisition needs of the Department. To accomplish these objectives, the EAD will:

- Promote guidance and provide assistance to customers who use FirstSource II;
- Ensure that customers are aware of their responsibilities and the scope of the FirstSource II and other enterprise-wide contracts;
- Address and satisfy the needs of all participants in the acquisition process;
- Maintain a level of program integrity that prevents or mitigates contractual or programmatic problems; and,
- Solicit feedback and provide continuous process improvement.

The EAD is available to work directly with customers and FirstSource II prime contractors throughout the acquisition process, to provide assistance, support, and overall FirstSource II program assistance. The EAD is also responsible for receiving, monitoring, and reporting all DO awards and all "fair opportunity" exceptions.

2.2 Requiring Activity

The Requiring Activity or component is responsible for preparing the DO solicitation and requirements packages, a purchase request/requisition and bill of material / statement of work (if appropriate).

It is the responsibility of the Requiring Activity to obtain all necessary approvals (i.e., Investment Review Board, DHS OCIO Information Technology Acquisition Review (ITAR), funds certification, OCPO, etc.).

2.3 Contract Level Contracting Officer (CO)

The Contract Level CO has the overall responsibility for administration of the FirstSource II contracts. The Contract Level CO is the only individual authorized to take actions on behalf of the Government to amend, modify, or deviate from the base contract terms, conditions, requirements, or specifications. The Contract Level CO is responsible for overall administration and final closeout of the contracts, and when necessary, shall:

- Provide scope oversight;
- Serve as liaison between the FirstSource II contractors and DHS;
- Assist in expediting orders;
- Ensure compliance with contract requirements;
- Issue the CO's final decision and handle all contract-level contractual disputes under the Contract Disputes Act; and,
- Issue all modifications against the base contracts.

2.4 Contract Level Program Manager (PM)

The Contract Level PM is the Government's central point of contact to the FirstSource II contractors for all technical matters. The Contract Level PM also serves as the liaison between the Contract Level CO and the DHS components IT program and procurement offices for technical issues related to the FirstSource II contracts. Other aspects of the FirstSource II PM's role are as follows:

- Ensure that customers are aware of their responsibilities and of the scope of the FirstSource II contract;
- Addressing and satisfying the needs of all participants in the process;
- Maintaining a level of program integrity that prevents or mitigates contractual or programmatic problems;
- Soliciting feedback and providing continuous process improvement; and
- Promoting guidance and providing assistance to customers who use FirstSource II.

2.5 Delivery Order Contracting Officer (DO CO)

DO COs are responsible for issuing solicitations and placing orders for IT commodity products and associated services offered under the FirstSource II contracts, and must follow the ordering procedures set forth below and in FAR 52.216-18 (Section I of the FirstSource II contract). All warranted COs of the DHS, including its Components, are authorized DO COs and are subject to the limitations expressed in their warrants. The DO CO is responsible for preparing the DO so-

licitation and for establishing the evaluation teams associated with each delivery order. The DO CO also formulates appropriate evaluation criteria and factors to ensure quality competition and provide the best value (or lowest price) for each effort. In no event will a DO change the requirements of the FirstSource II contracts. Should the contract user require such a change, specific approval must first be obtained from the Contract Level CO.

The DO CO resides within the ordering activity and will be identified on an individual order. The DO CO is authorized to:

- Issue Delivery Orders;
- Complete any and all administrative contractual actions with the Contractor concerning those Delivery Orders issued by their office;
- Terminate Delivery Orders, issued by their office, for convenience and cause and cancel delivery orders with no additional cost to the Government; and,
- Use maximum flexibility in pricing arrangements which are not addressed in the base contract.

2.6 Delivery Order Contracting Officer's Representative (DO COR)

DO COs should designate CORs for individual DOs who will be responsible for the day-to-day monitoring of performance under the DO. It is the DO CO's responsibility to confirm that the designated individual is a trained and certified COR, and has adequate time to complete the duties for which he/she is responsible.

The DO COR responsibilities may include:

- Representing the DO CO in the administration of technical details within the scope of the DO;
- Ensuring final inspection and acceptance of all DO deliverables and reports, and other responsibilities that may be specified in the letter of designation, including review of Section 508 compliance testing results; and,
- Completing the prime contractor performance evaluations using the CPARS or another approved agency-specific contractor performance rating systems with respect to each DO.

The DO COR is not authorized to make any representations or commitments of any kind on behalf of the DO CO or the Government. The DO COR does not have authority to alter the contractor's obligations or to change the specifications, pricing, terms or conditions. If, as a result of technical discussion(s), it is desirable to modify requirements or the specifications, changes shall be issued in writing and signed by the DO CO.

2.7 Delivery Order Contract Ombudsman

- The Delivery Order Ombudsman has the responsibility to review contractor complaints and ensure that all contractors are afforded a fair opportunity to be considered for each delivery order, consistent with the ordering procedures in the contract.

- The Delivery Order Ombudsman is responsible for reviewing complaints from Contractors on delivery orders, and if any corrective action is needed, will provide a written determination of such action to the Delivery Order Contracting Officer.
- The cognizant Ombudsman resides in the DHS component placing the order. Issues that cannot be resolved within the Component will be forwarded to the Department Delivery Order Ombudsman for review and resolution.

The complete list of Ombudsmen can be found on DHS Open for Business at:

http://www.dhs.gov/xopnbiz/regulations/gc_1204658767888.shtm

2.8 Contractor’s Program Manager – Contract Level

The Contractor’s PM shall act as the central POC with the Government for all program-wide technical matters. The Contractor’s PM shall be responsible for resolution of all technical issues, program management, and other contract support. This includes providing comprehensive account support for the FirstSource II contract. The Contractor’s PM is responsible for overall contract performance.

3 FirstSource II Ordering Procedures

3.1 FirstSource II Ordering Procedures

FirstSource II has contract awards in five (5) socio-economic categories. Vendors may have received awards in more than one socio-economic category, but these contracts are entirely independent of one another. Ordering on FirstSource II requires that each Contractor within one of the five (5) selected socio-economic categories be provided a fair opportunity to be considered for an individual delivery order exceeding the micro-purchase threshold, unless one of the exceptions at FAR 16.505(b)(2) applies. Determination of which socio-economic category will be used is at the discretion of the DO CO. For example, if the 8(a) category is selected, the fair opportunity will be provided only to the Contractors within the 8(a) category. Pursuant to FAR 13.202 and 16.505(b)(1)(i), the DO CO may make an award, at or under the micro-purchase threshold, without seeking competitive quotations. Delivery Orders will be issued on either a FFP (to include FFP with incentives) or a FFP/T&M basis.

3.2 Basic Ordering Process

The ordering process for FirstSource II is virtually identical to the ordering process under the original FirstSource, with one exception – DO COs must choose one of the five (5) socio-economic categories under which to issue their solicitation and make awards. As with FirstSource and in accordance with the provisions of FAR 16, all of the vendors within the socio-economic category must be provided with a fair opportunity to compete, unless an exception applies.

If a DO CO has not issued orders under FirstSource, they are similar to those used under virtually every multiple award IDIQ vehicle. In brief, the ordering procedures that shall be used are as follows:

- 1) Determine the requirement(s) (i.e., how many / how much of the item is needed, can salient characteristics be used or is a brand-name justification necessary, what is the Independent Government Cost Estimate, what is the delivery due date, etc.);
- 2) Generate the solicitation document, paying particular attention to any security clearance requirements, value-added reseller services requirements, and terms and conditions;
- 3) Select a socio-economic category under which to submit the solicitation, based on market research, socio-economic goals of the ordering activity, etc.;
- 4) Provide the solicitation to all the vendors under that socio-economic category (do not 'mix and match' vendors from different socio-economic categories, or provide the solicitation to all or multiple socio-economic categories) using the e-mail addresses provided on the FirstSource II website or FedBid;
- 5) Evaluate the bids provided in response to the solicitation, in accordance with the terms of the solicitation; and,
- 6) Make award to the appropriate vendor, and provide award notifications to all the unsuccessful Offerors.

3.3 EAD Assistance

Upon request of the DO CO, the EAD will assist with the creation of the DO solicitation, or review a request package developed by the ordering activity. The EAD can offer advice regarding one or more of the following issues:

- Applicability of the delivery order request package with respect to scope;
- Adequacy of the evaluation criteria;
- Realism of the IGCE; and,
- If applicable, adequacy of the justification used for the exception to the requirements for fair opportunity to be considered.

FSII Contractor	Point of Contact	Telephone Number	POC Email Address
<i>HUBZONE Socio-Economic Category</i>			
Wildflower International, Inc.	Carly Goldstein	505-466-9111	FSII_HUBZone@wildflowerintl.com
C&C Intl. Computers & Consultants	Cecilia James	954-450-0023	FSII_HUBZone@ccintercomputers.com
Blue Tech, Inc.	Susan Stone	619-488-9229	FSII_HUBZone@bluetech.com
PCi Tec	Rosina Kling	540-635-4402, 310	FSII_HUBZone@pcitec.com
Anacapa Micro Products, Inc.	Glenn Anderson	800-800-7056	FSII_HUBZone@anacapamicro.com
Akira Technologies, Inc.	Eli Liang	202-248-5095	FSII_HUBZone@akira-tech.com
<i>8(a) Socio-Economic Category</i>			
IMPRES Technologies, Inc.	Richard Fu	562-298-4030	FSII_8a@impresttechnology.com
Unistar-Sparco Computers, Inc.	Soo-Tsong Lim	901-872-2272	FSII_8a@sparco.com
New Tech Solutions, Inc.	Rajesh Patel	510-353-4070, 307	FSII_8a@ntsca.com
Trofholz Technologies, Inc.	David Raymond	916-577-1903	FSII_8a@trofholz.com
MCP Computer Products, Inc.	Raj Ghai	760- 471-5383	FSII_8a@mcpgov.com
Akira Technologies, Inc.	Eli Liang	202-248-5095	FSII_8a@akira-tech.com
Green IT Systems Group	Dirar Hakeem	202-327-3863	FSII_8a@greenitsystems.net
<i>SDVOSB Socio-Economic Category</i>			
Trofholz Technologies, Inc.	Yvonne M. Glenn	916-788-8927	FSII_SDVOSB@trofholz.com
ThunderCat Technologies, Inc.	Bill Guzek	434-258-6338	FSII_SDVOSB@thundercattech.com
Four Points Technology	Joel Lipkin	703-657-6127	FSII_SDVOSB@4points.com
Alvarez and Associates	Jon Wright	303-997-1392	FSII_SDVOSB@alvarezassociates.com
FedStore Corporation	Stuart Harding	240-449-8801	FSII_SDVOSB@fedstore.com
SDV Solutions, Inc.	Brian Brause	757-903-2068, 301	FSII_SDVOSB@sdsolutions.us
FS Vets	Matt Rzonca	571-318-7101	FSII_SDVOSB@Firstsourceveterans.com
Patriot Comm	Anthony Closson	571-354-1411	FSII_SDVOSB@patriot-comm.com

EDWOSB Socio-Economic Category

Trofholtz Technologies, Inc.	David Raymond	916-577-1903	FSII_EDWOSB@trofholz.com
Westwind Team, LLP	Steve Hull	505-345-4720	FSII_EDWOSB@wwindteam.com
Blue Tech, Inc.	Susan Stone	619-488-9229	FSII_EDWOSB@bluetech.com
PCi Tec	Rosina Kling	540-635-4402, 310	FSII_EDWOSB@pcitec.com
MCP Computer Products, Inc.	Raj Ghai	760- 471-5383	FSII_EDWOSB@mcpgov.com

SB Socio-Economic Category

Wildflower International, Inc.	Carly Goldstein	505-466-9111	FSII_SB@wildflowerintl.com
IMPRES Technologies, Inc.	Richard Fu	562-298-4030	FSII_SB@imprestechology.com
iGov	Tom Walsh	703-656-1160	FSII_SB@igov.com
FCN	Gil Van Schoor	443-857-6779	FSII_SB@fcnit.com
Red River Computing	Jo Purdy	603-442-5546	FSII_SB@redriver.com
Blue Tech, Inc.	Susan Stone	619-488-9229	FSII_SB@bluetech.com
FS Partners	Kathleen Robinson	703-429-3206	FSII_SB@firstsourcepartners.com
Merlin International	Donovan Quinonez	303-339-2211	FSII_SB@merlin-intl.com
GovPlace	Fadi Jarrar	949-973-7561	FSII_SB@govplace.com
Government Acquisitions	Michael Downard	513-562-2046	FSII_SB@gov-acq.com
Affigent	Jeremy Nusbaum	571-323-5469	FSII_SB@affigent.com
SNAP	Vivek Gupta	703-230-6602	FSII_SB@snapinc.com
Trofholtz Technologies	David Raymond	916-577-1903	FSII_SB@trofholz.com
ThunderCat Technology	Bill Guzek	434-258-6338	FSII_SB@thundercattech.com