NOAALink 101
Pre-Award Training

Visit us at:

http://www.cio.noaa.gov/NOAALink/index.html

NOAALink

Service. Partnership. Commitment.
Where Business and IT Connect.

Important to Do Before the Session!

To connect to audio using telephone follow the steps below:

- During a session, select *Use Telephone* in the Audio pane of your Control Panel
- Dial the conference call number provided
- Enter the access code followed by the # key
- Enter the # key , enter the audio PIN, enter the # key again

Before beginning the presentation the instructor will conduct an audio test

- If you are having trouble hearing the instructor please **raise your hand**

Introduction

Introduction: Expected Outcomes

At the end of this training course, you will:

- Understand how the NOAALink Program works
- Understand NOAALink roles
- Understand how to initiate a NOAALink request
- Understand how a NOAALink acquisition is completed

Introduction: Why NOAALink

The NOAALink Program is an innovative approach to NOAA's enterprise-wide strategic IT planning and management.

The NOAALink Program Strives to:

- Align IT investments with NOAA's identified IT strategic initiatives
- Increase visibility into NOAA's IT purchase pipeline
- Identify and combine like requirements
- Coordinate collaborative efforts across the organization

Introduction: Benefits of NOAALink

- Leverage services already available
- Acquisition process support
  - Certified Project Managers can assist with package preparation and submission
  - Past package documents for reference
- Pre-competed pool of contractors
  - Shortened proposal response time
  - Limited number of proposals
  - Standardized technical evaluation criteria
- Post-award support
  - Contract administration
  - Performance monitoring
  - Standardized reporting – Monthly reports and status reviews, spend plans
  - Consistent standards and processes across contractors

NOAA Link

How NOAALink Works

How NOAALink Works: Contracts

NOAALink minimizes the number of contractors responding to RFPs for NOAA IT purchases, which leads to efficiencies in the bid and proposal process.

NOAALink contract structure:

- IDIQ contracts awarded to 8(a) and Small Business contractors
  - Contractors receive primary consideration for all NOAA IT purchases
- 10 year contracts have been awarded to:
  - 1 Strategic Management Services (SMS) contractor
  - 10 core IT services contractors
    - 5 Small Businesses
    - 5 8(a) Businesses
- CO determines which contractor group will have an opportunity to bid on a requirement.

How NOAALink Works: Requirements

- The following must be submitted to NOAALink:
  - Requirement types
    - New requests
    - Modifications for existing requirements
  - Contract types
    - Fixed Price
    - Time & Material
    - Labor Hours
- The following do not need to be submitted to NOAALink:
  - Micro-purchases – Those acquisition for supplies & services that come in at $3,000 or less (aggregated)
  - Laptops, PCs, and accessories – Order directly from DOC PC Portal
  - Office equipment – Items such as copiers, toners, and cartridges

Program Overview

Roles & Responsibilities
NOAALink Program

Office of the Chief Information Officer

- NOAALink Program Office **(NPO)**
  - Program Director
    - Project Managers
    - Contracting Officer's Representatives

Acquisition and Grants Office

- Strategic Sourcing Acquisition Division
  - Strategic Sourcing Director
    - Contracting Officers **(Services)**
      - Contract Specialists
    - Contracting Officers **(Products)**
      - Contract Specialists

NOAA Link

Roles & Responsibilities: NOAALink Users

General NOAALink Roles

- **The Task Manager (TM)**: Monitors all technical aspects of the contract and assists in contract administration.
- **Alternate Task Manager (ATM):** May share the TM's duties, as well as handle the TM's duties during his/her absence (leave, training, or other time away from the office).
- **Budget Point of Contact (BPOC):** Will be responsible for approving funding for the requested requirements.

Pre-Award Specific Roles

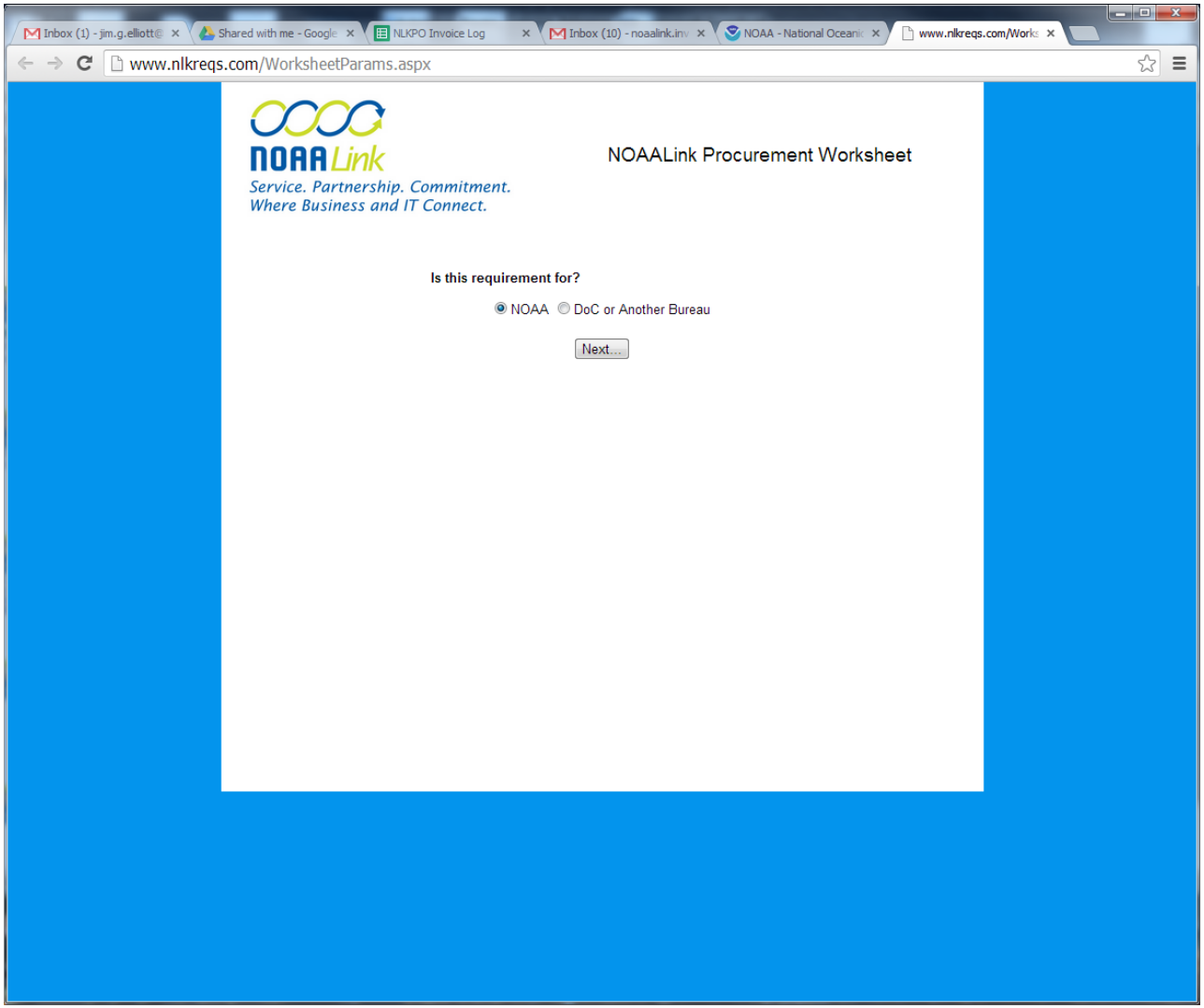
- **Budget Point of Contact (BPOC) / Task Manager (TM) / Designee:** Enters all planned requirements of $150,000 or more into the Forecasting and Advanced Acquisition Planning System (FAAPS).
- **Requisitioner**: Uses the C.Request system to create a requisition & define funds. This may be, but is not restricted to, the Task Manager.
- **Fund Certifier/Final Approval Official:** Certifies that funds are available for the purchase of the requested requirement and approves the requisition for submission to NLK, regularly servicing acquisition division, or field delegate.

NOAALink Request Process Overview

NOAALink Request Process Completing a NOAALink Worksheet

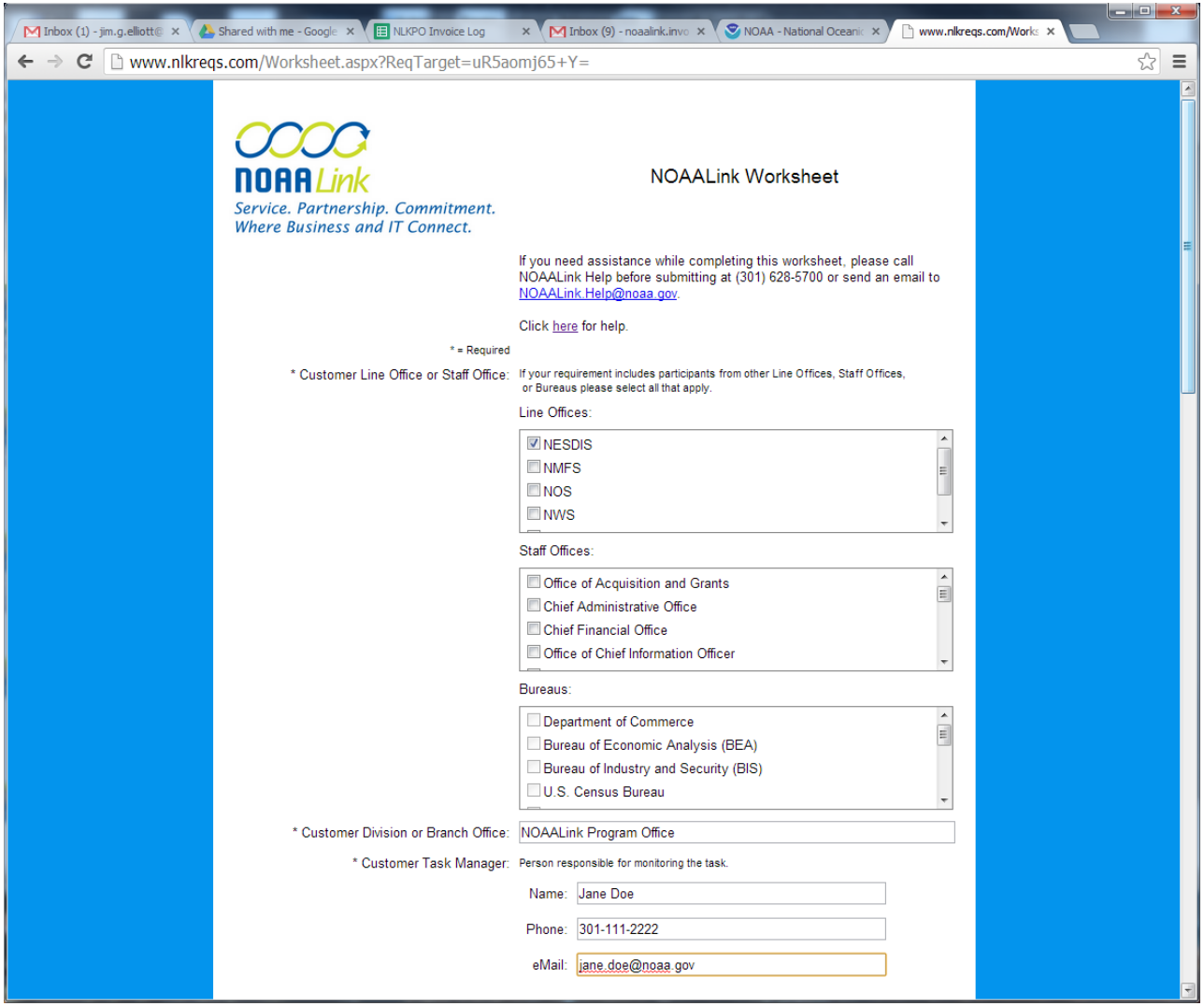
NOAALink Request Process: Complete a NOAALink Worksheet

1. Follow this link: https://www.nlkreqs.com/WorksheetParams.aspx to populate a NOAALink Worksheet
2. Select the appropriate classification for your department
   a) NOAA
   b) Another DOC Bureau



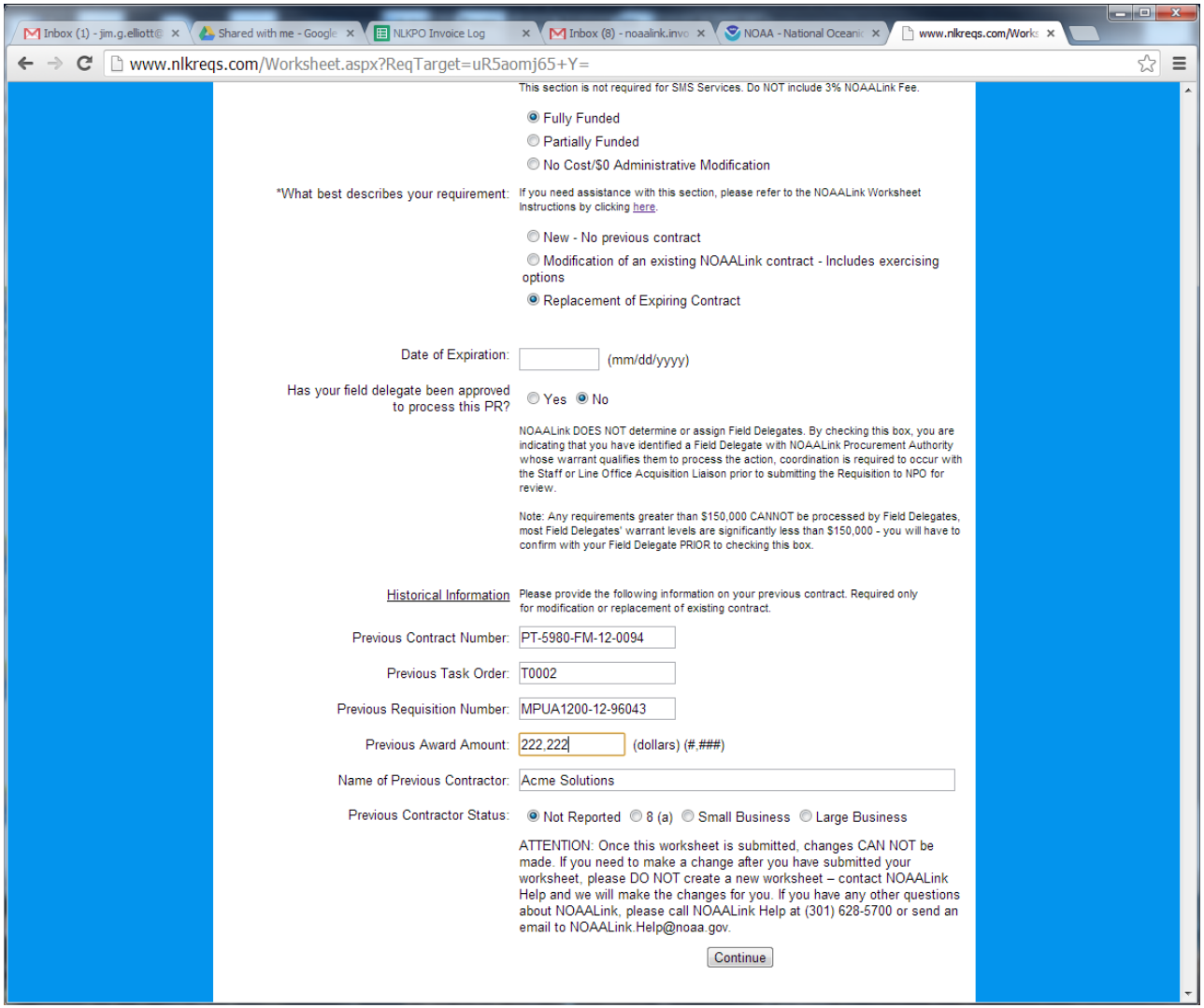
NOAALink Request Process: Complete a NOAALink Worksheet

3. Complete all required fields marked with an asterisk



NOAALink Request Process: Complete a NOAALink Worksheet

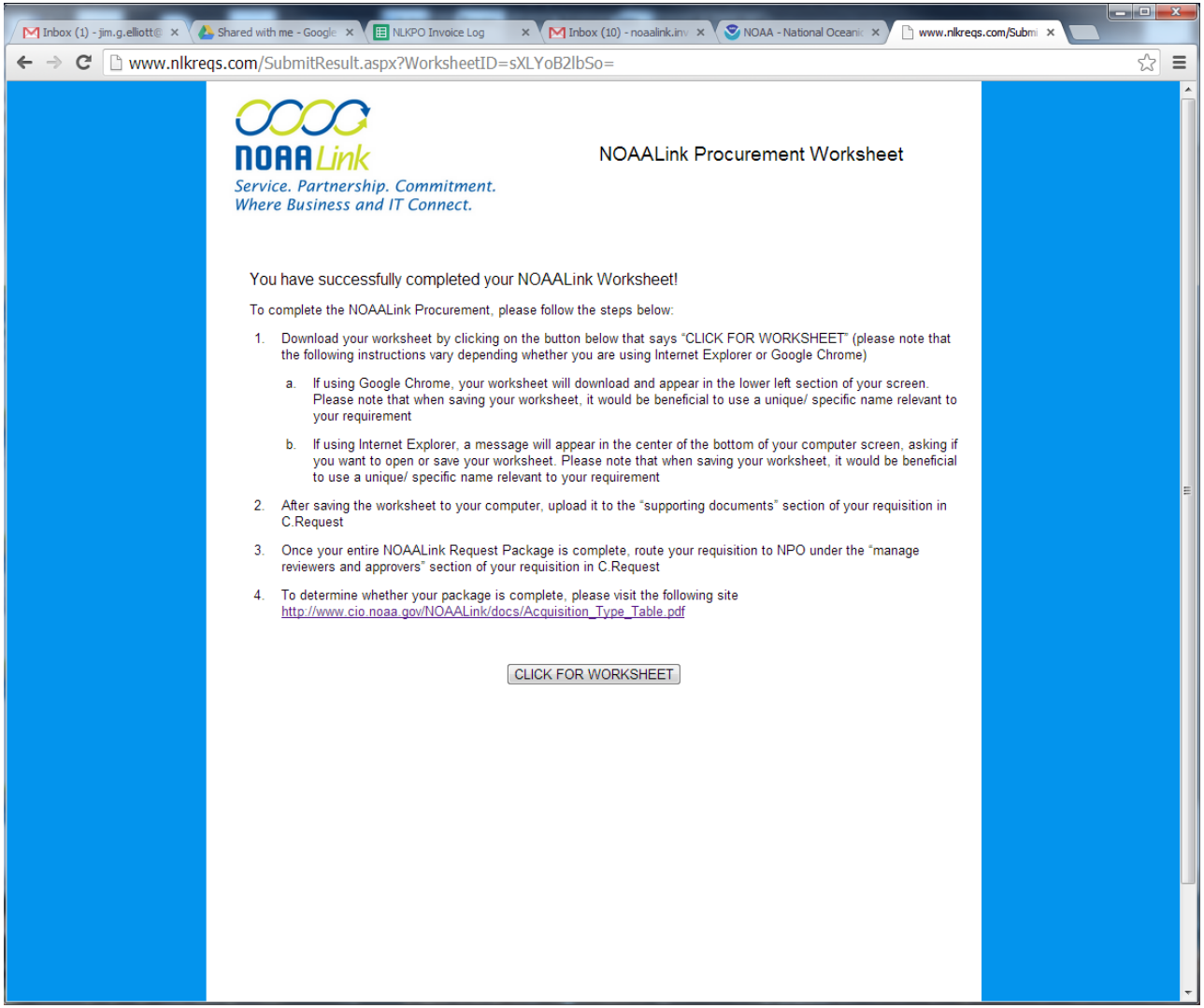
4. Press **Continue** at the bottom of the page



NOAALink Request Process: Complete a NOAALink Worksheet

5. Click **Click for Worksheet**
6. Save your NOAALink Worksheet PDF
7. Attach your Worksheet to your requisition submission

   Detailed steps for submitting your requisition in C.Request are outlined in the next section 'Completing a Requisition'



NOAALink Worksheet Process

PG 1 of Worksheet

NOAALink
Service. Partnership. Commitment.
Where Business and IT Connect.

NOAALink Worksheet

Worksheet Submission Date:	2/21/2013 2:30 PM (EST)
Customer Line Office or Staff Office:	Office of Chief Information Officer
Customer Division or Branch Office:	NOAALink Program Office
Customer Task Manager:	
Name:	NOAALink Program Office
Phone:	301-628-5713
eMail:	noaalink.help@noaa.gov
Other Point of Contact:	
Requirement Title:	Worksheet Example
Requirement Description:	This is an example of a NOAALink Worksheet.
Type of Requirement:	Services
FAAPS Number related to this Requirement:	
Exhibit 300 Investment Name:	
FISMA ID:	
Time Constraint:	2/20/2013

NOAALink

NOAALink Worksheet Process

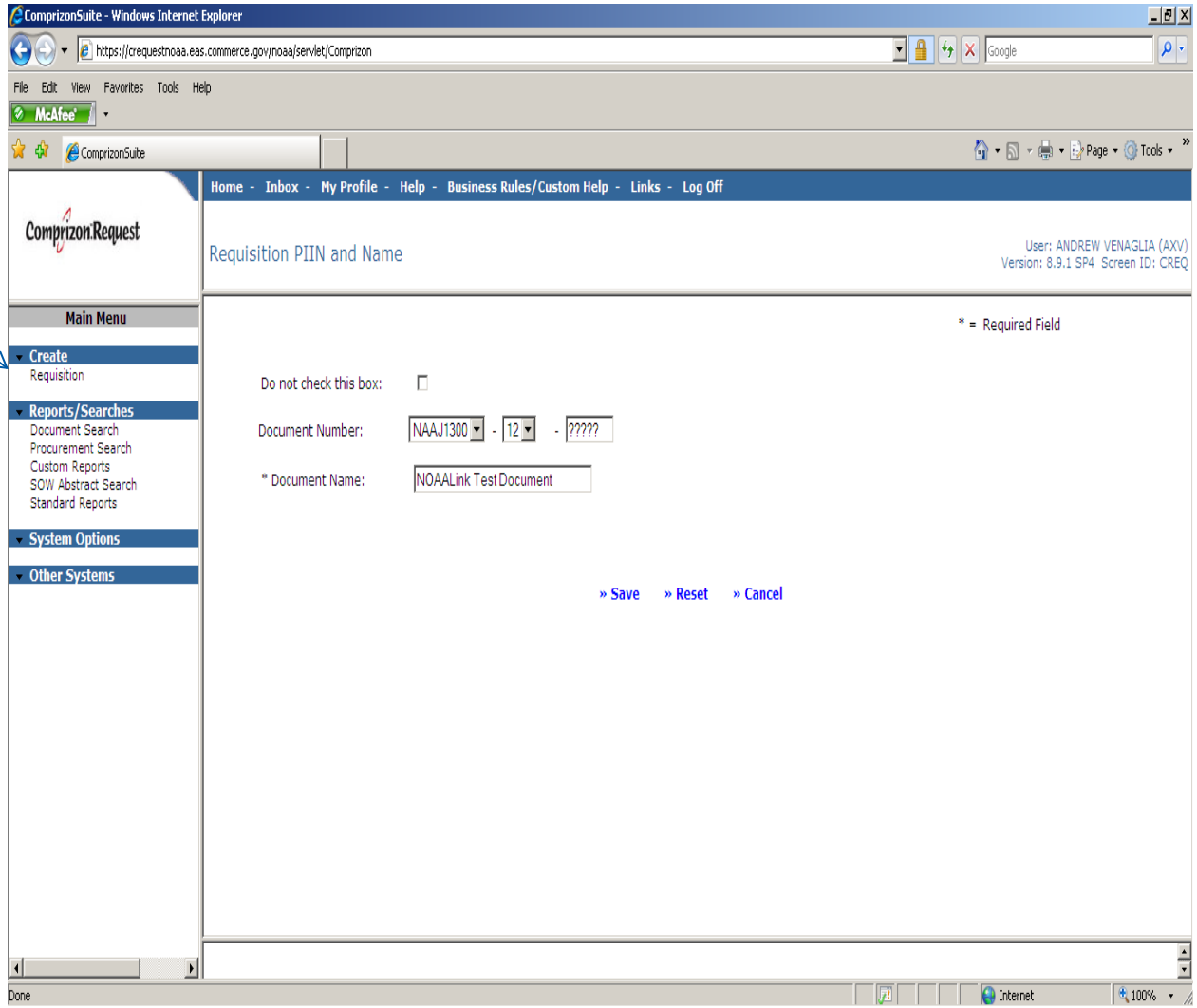
PG 2 of Worksheet

Estimated Ceiling Cost:	$.00
Estimated Base Cost:	$.00
Funding:	Fully Funded
What best describes your requirement?:	New - No previous contract
Date of Expiration:	
Historical Information	
Previous Contract Number:	
Previous Requisition Number:	
Previous Award Amount:	
Name of Previous Contractor:	
Previous Contractor Status:	Not Reported
Worksheet ID:	2320

NOAALink Request Process
Completing a Requisition

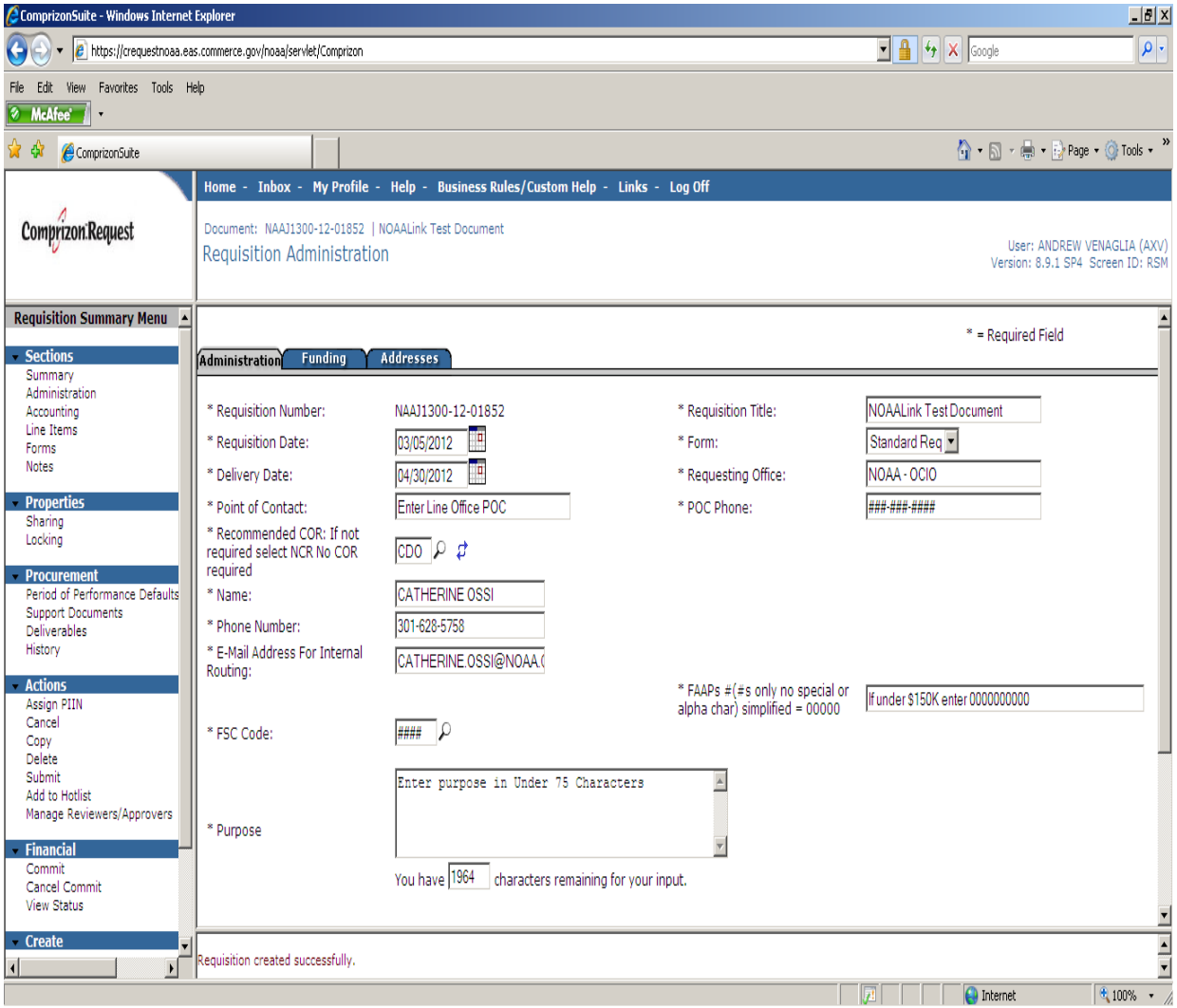
NOAALink Request Process: Complete a Requisition

1. From the **Home** page select **Requisition** from the Main Menu under **Create**



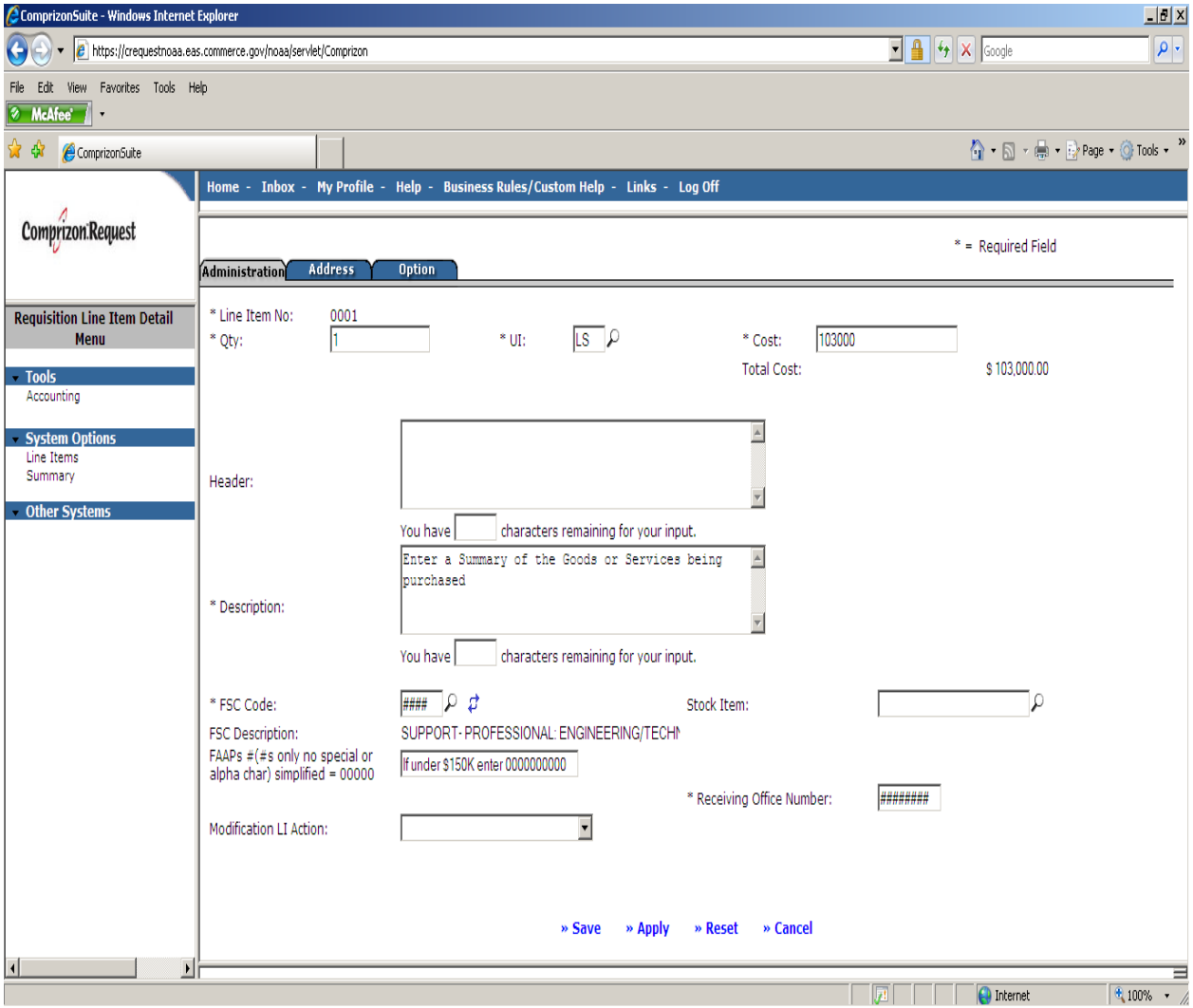
NOAALink Request Process: Complete a Requisition

2. Complete all of the required fields marked by an asterisk on the **Administration** tab from the **Requisition Administration** page
   a) Except when submitting through a Field Delegate, enter in the **Recommended COR** field:
      a) NLK (NOAALink) for service requirements
      b) NCR (No COR Required) for product requirements
   b) Enter the **Point of Contact** responsible for this requirement
   c) Enter the Federal Supply Class (FSC) Code, which will be determined by the procurement type. A complete list of NOAALink specific FSC codes can be found at http://www.pps.noaa.gov/offnames.html



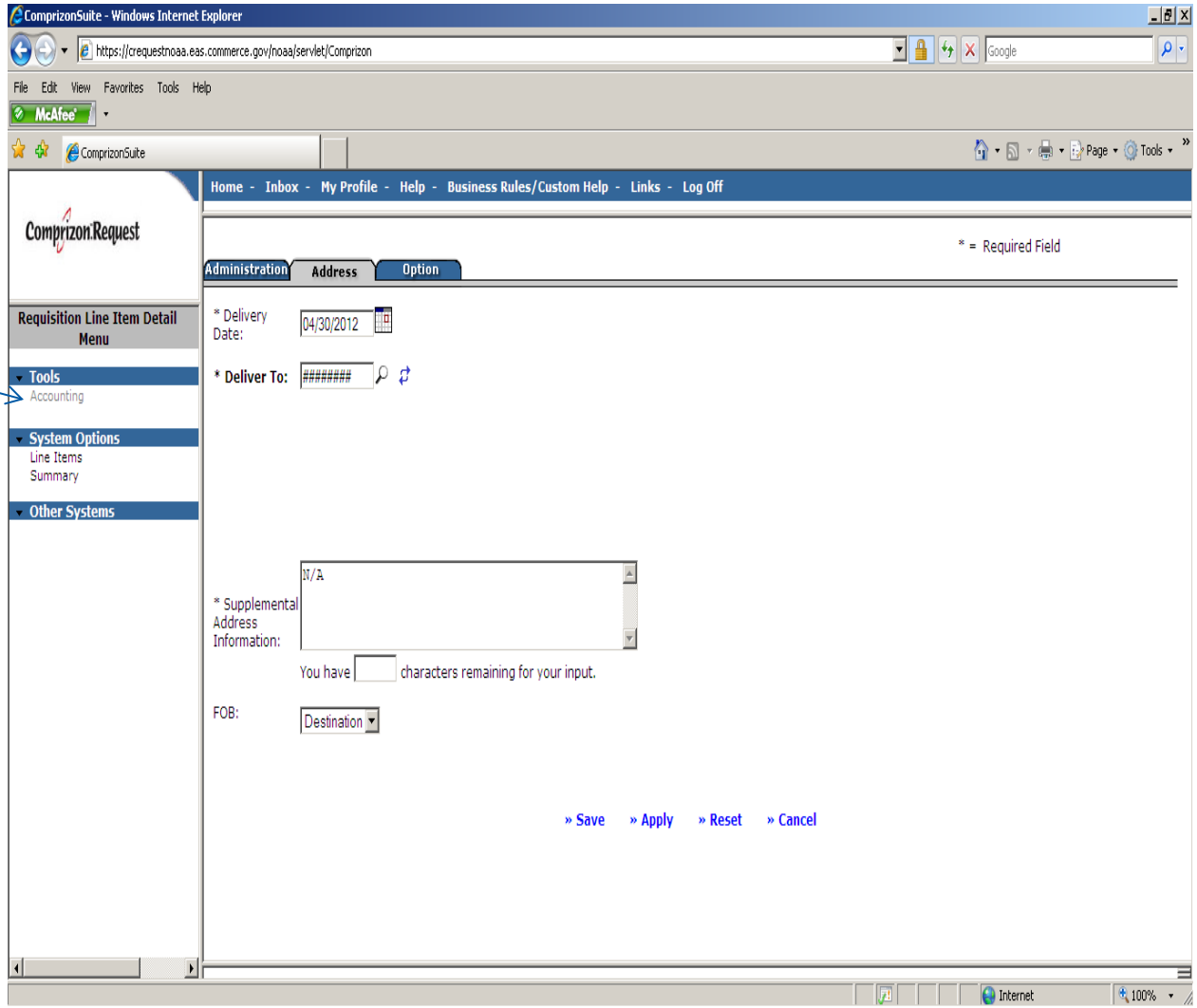
NOAALink Request Process: Complete a Requisition

3. Begin entering your line item information as you normally would by selecting **Line Items** from the **Summary** page. Complete all of the required fields marked by an asterisk on the **Administration** tab.



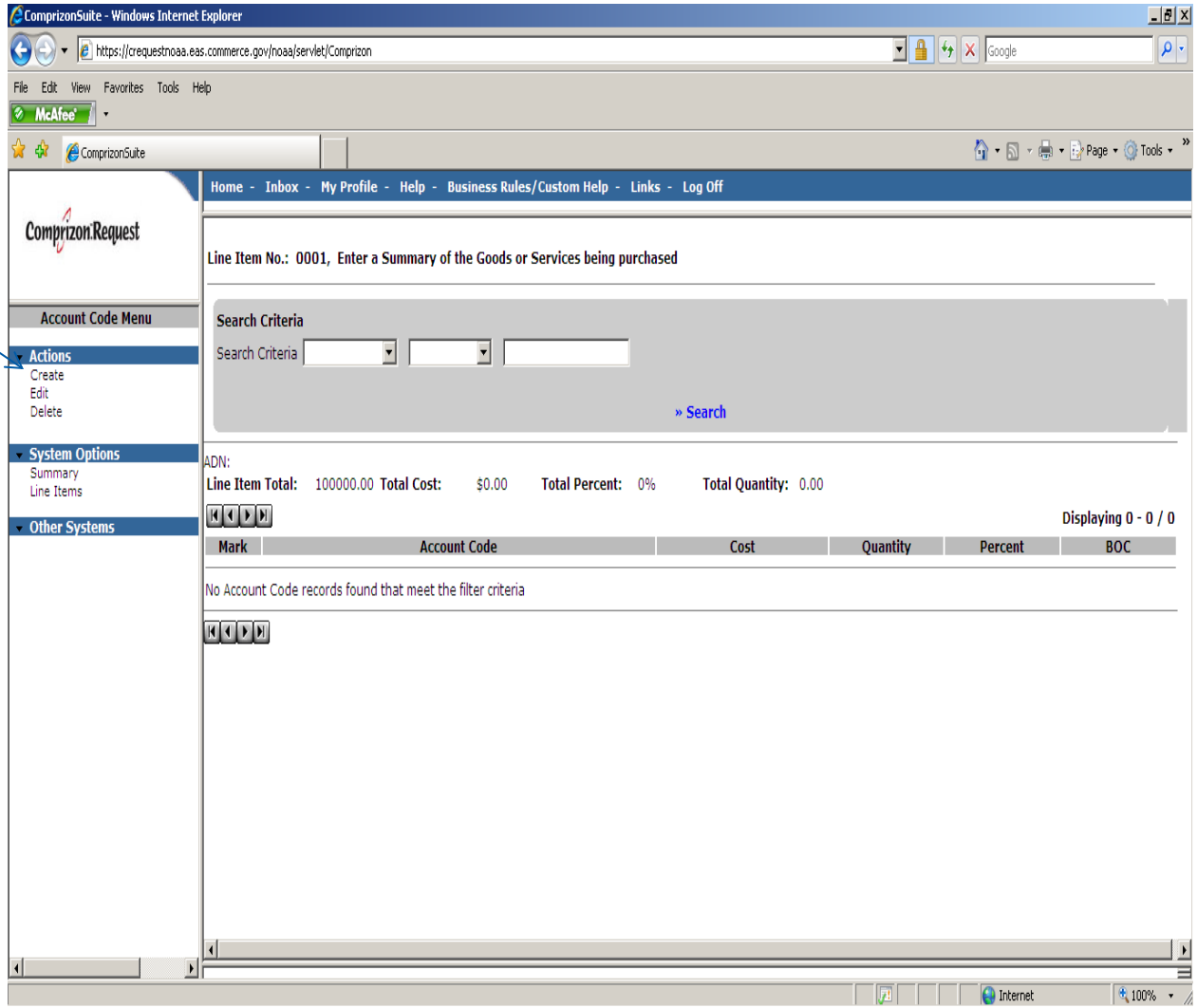
NOAALink Request Process: Complete a Requisition

4. Complete all of the required fields marked by an asterisk on the **Address** tab
5. Select **Accounting** from the **Requisition Line Item Detail Menu** under Tools



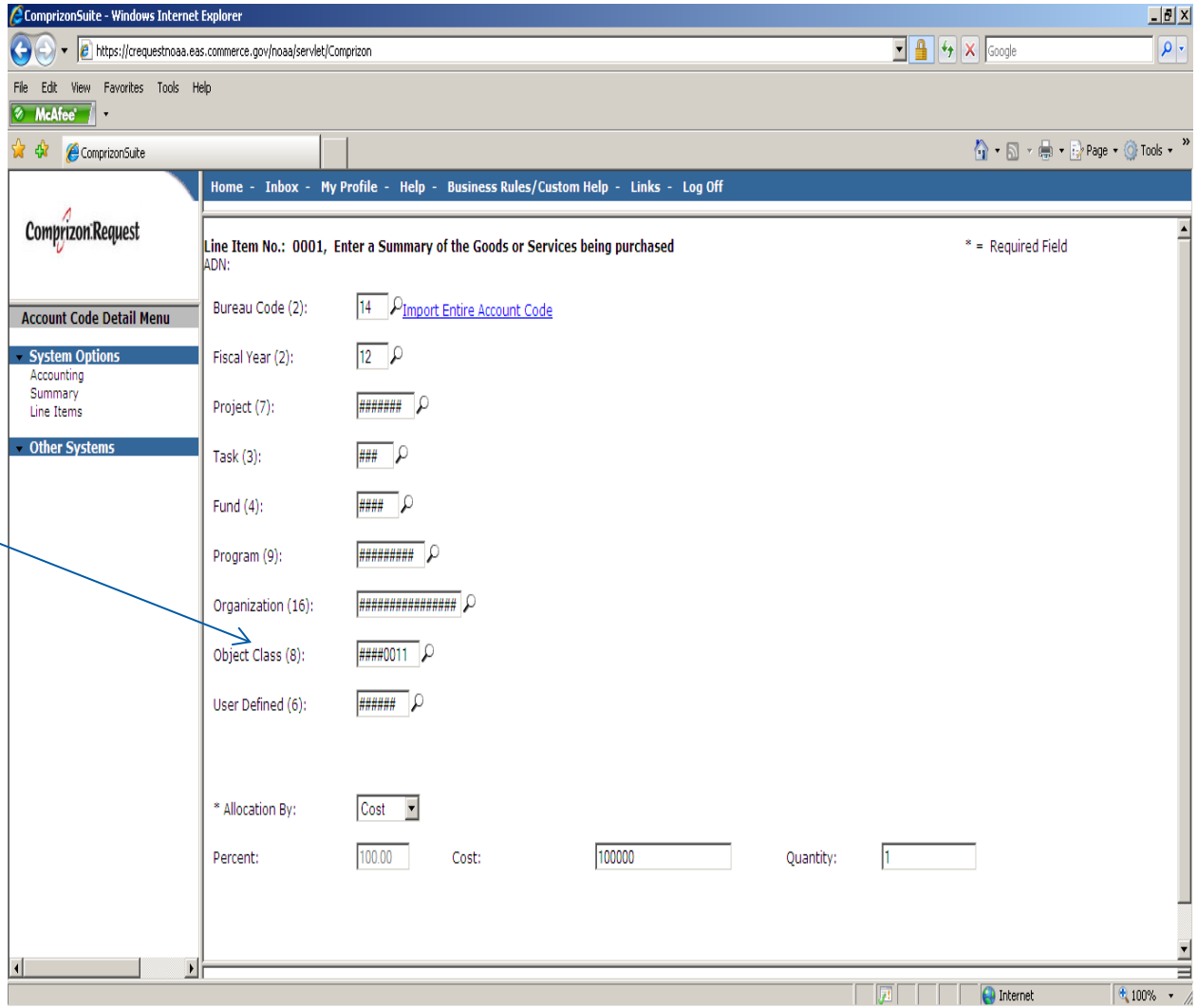
NOAALink Request Process: Complete a Requisition

6. Select **Create** from the **Account Code Menu** under **Actions**



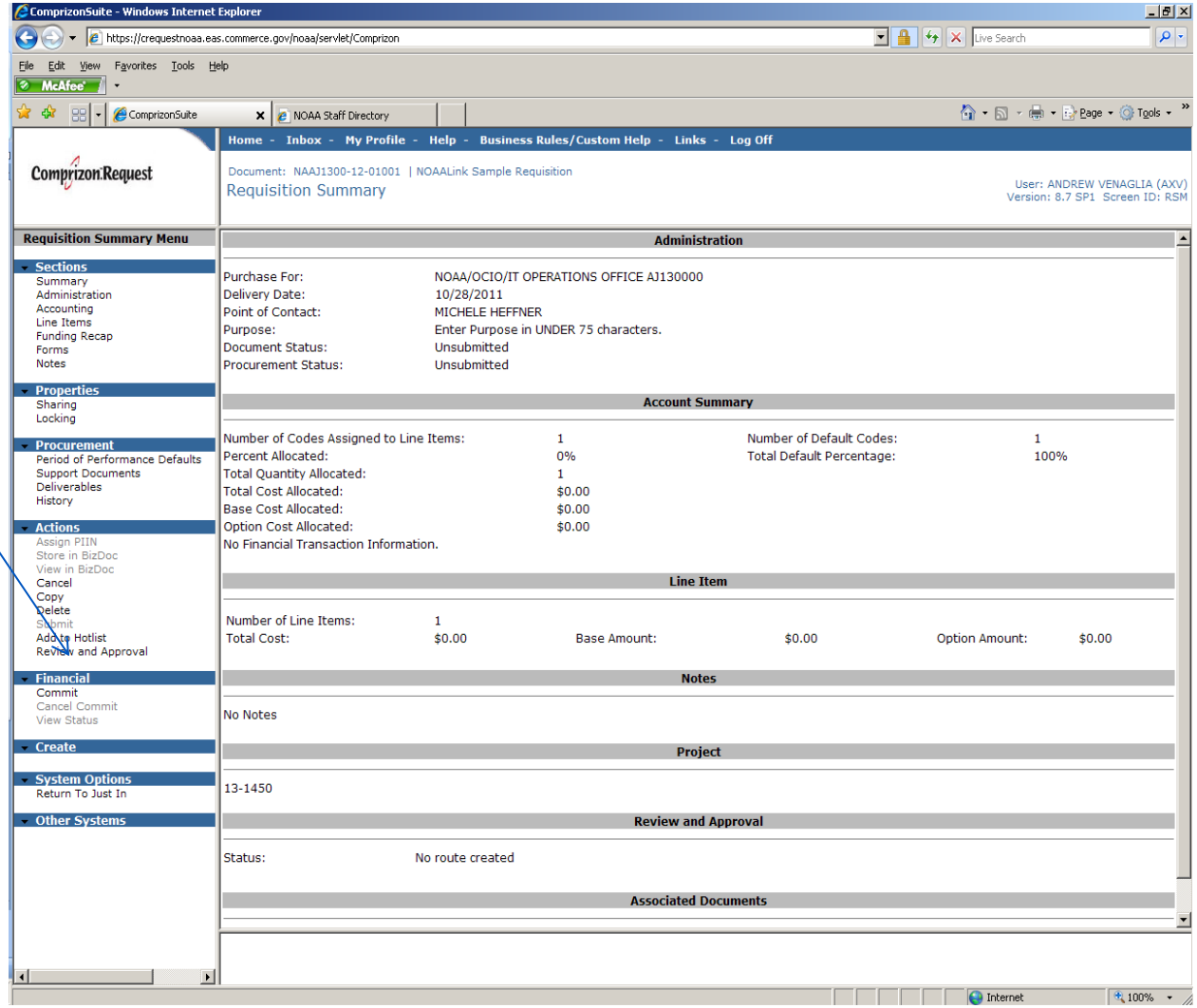
NOAALink Request Process: Complete a Requisition

7. Enter Line Item details according to NOAALink specifications (except when submitting through a Field Delegate):
   a) Enter NOAALink-specific Object Class code by adding 11 as the last two digits to your standard code. Contract products/services must have "11" in the object 4 field of the four-level object class ##-##-##-11 (for example 25-23-00-11, 31-23-00-11, etc.)
   b) Remember to communicate the total cost of the PR, including the 3% NOAALink fee, with your financial, budget, and approving officials
   c) If required, add a travel CLIN



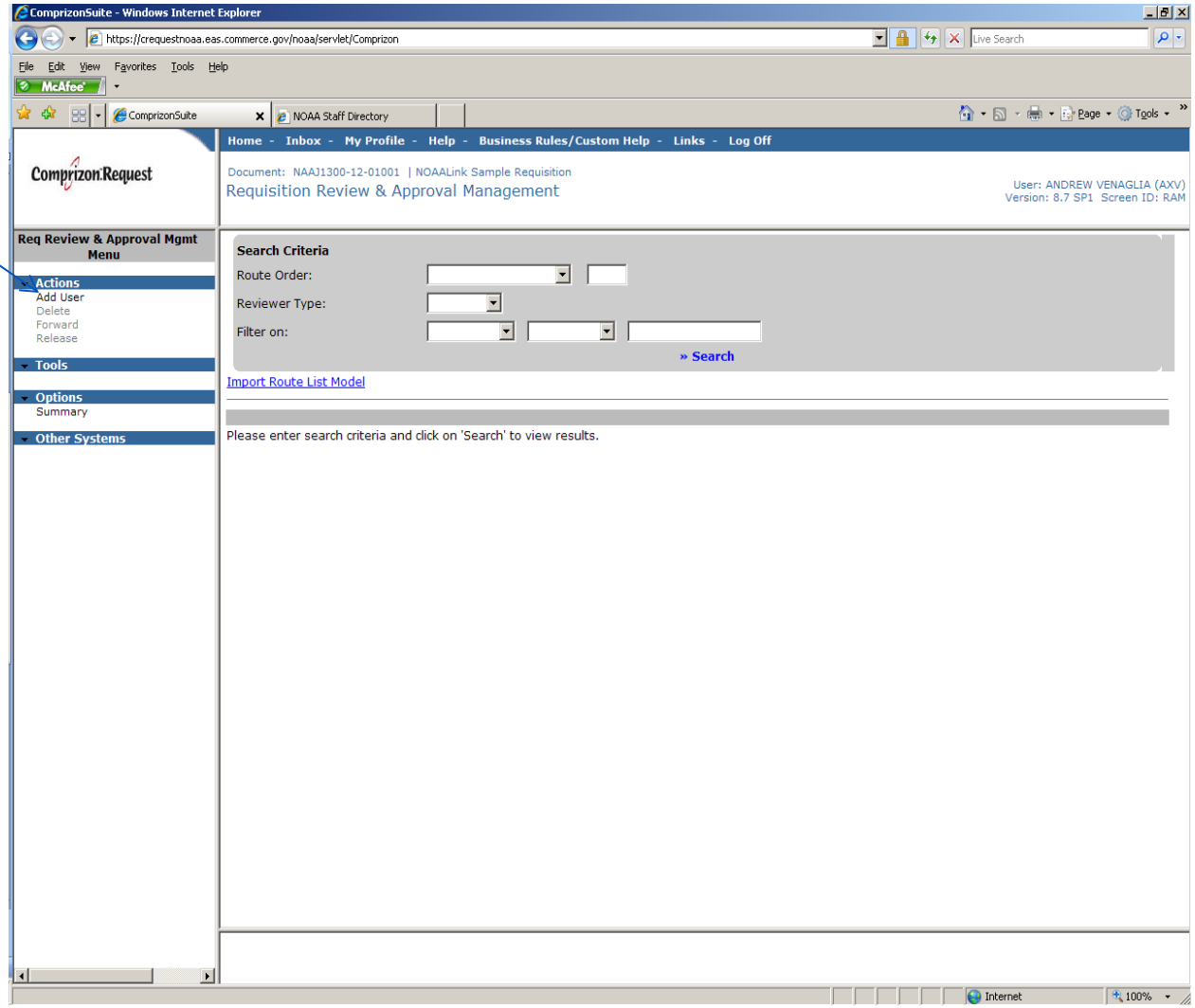
NOAALink Request Process: Complete a Requisition

8. Select **Review & Approval** on the **Requisition Summary** page



NOAALink Request Process: Complete a Requisition

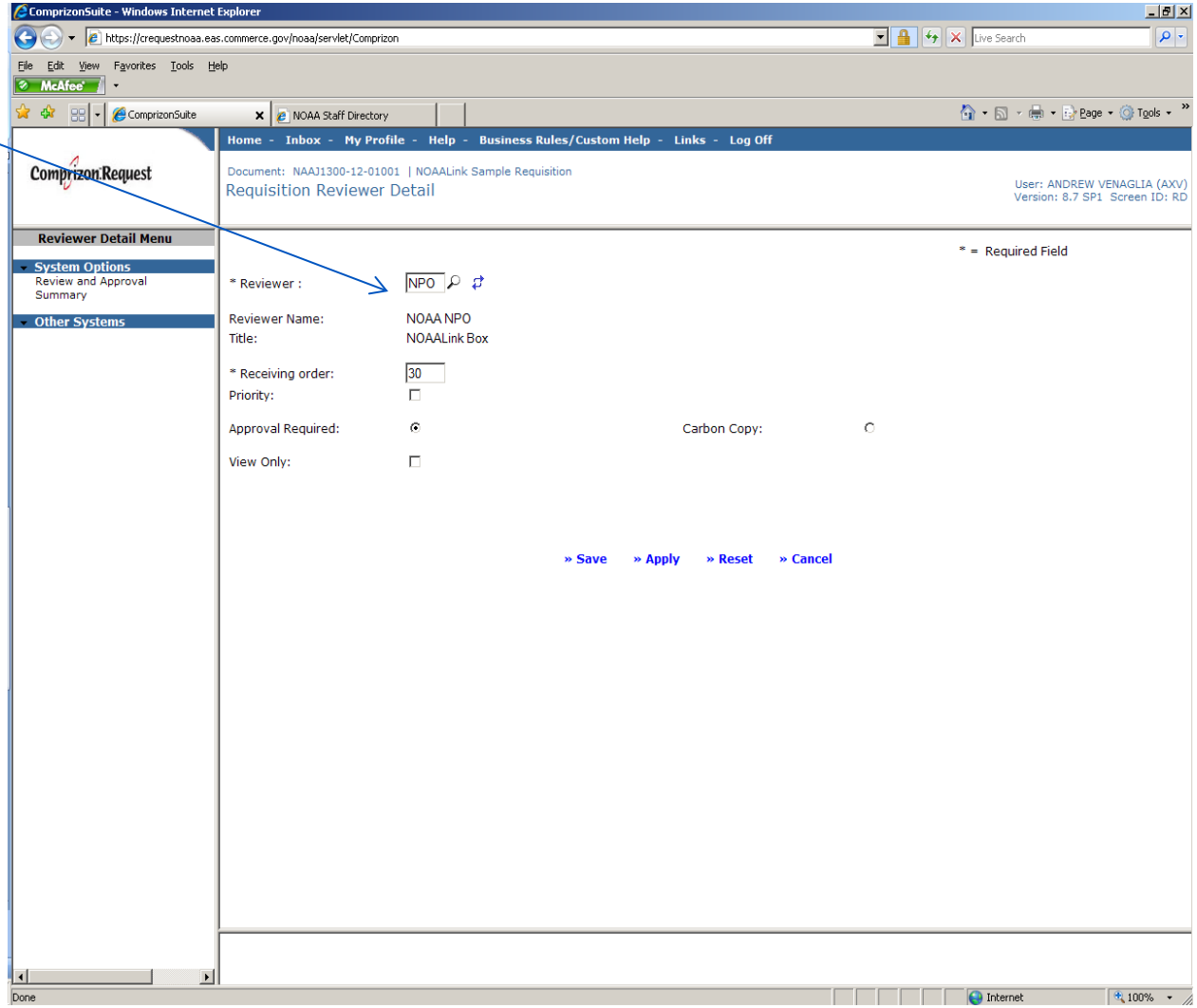
9. Select **Add User**



NOAALink Request Process: Complete a Requisition

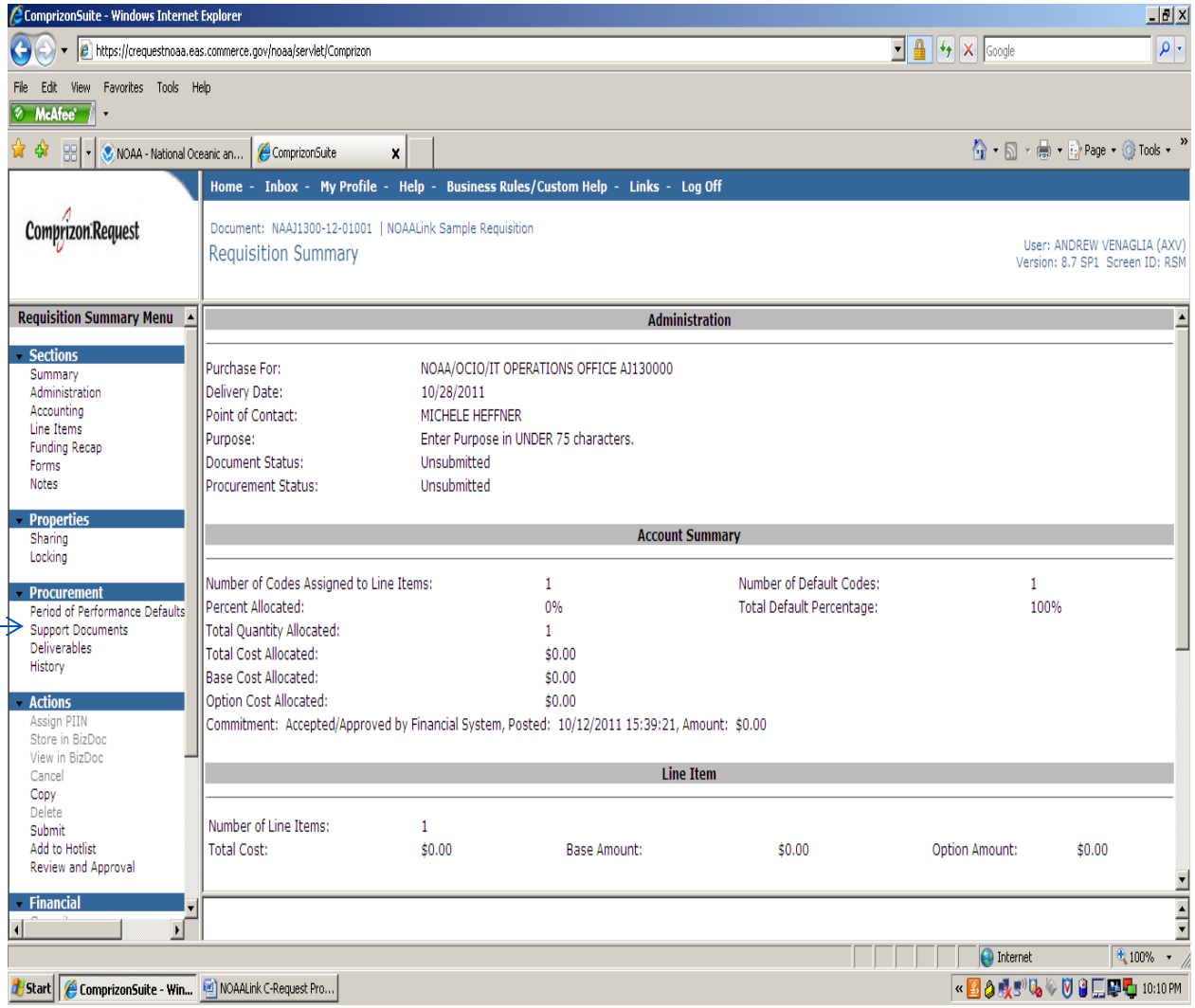
10. Add NPO as a reviewer to your requisition (NOT NLK/ENT).

    Although the number and nature of approvers may vary depending on your particular Line/Staff Office's procedures, as a general rule your requisition should be routed to **NPO** for approval **before** your office's **Final Fund Certifier/Approval Official**. For example if the fund certifier/approving official is a 40, NPO should be a lower number (in the sample shown in the adjacent screen shot, NPO is 30)
11. Save



NOAALink Request Process: Complete a Requisition

12. In addition to your required documents, you will need to attach a copy of the NOAALink Worksheet. (For guidance on the documents required for your acquisition, please refer to the NOAA Acquisitions Package Checklist http://www.ago.noaa.gov/acquisition/docs/noaa_acq_package_checklist_4-4-11.pdf.) Templates of the required documents can be found at http://www.cio.noaa.gov/NOAALink/noaalink_forms_docs.html
13. Select **Support Documents**
14. On the next screen, select **Create**



NOAALink Request Process: Important Note

Required documents will vary depending on the nature of the acquisition, however an **IGCE** is required for all requests submitted to NOAALink.

Market Research is required to support data provided on the IGCE, and should:

- Be based on publicly available information
- Not be obtained directly from contractors
- Be conducted using acceptable resources such as:
  - GSA Schedules eLibrary or GSA Advantage!
  - Online research
  - Catalogues
  - Historical data and factoring inflation

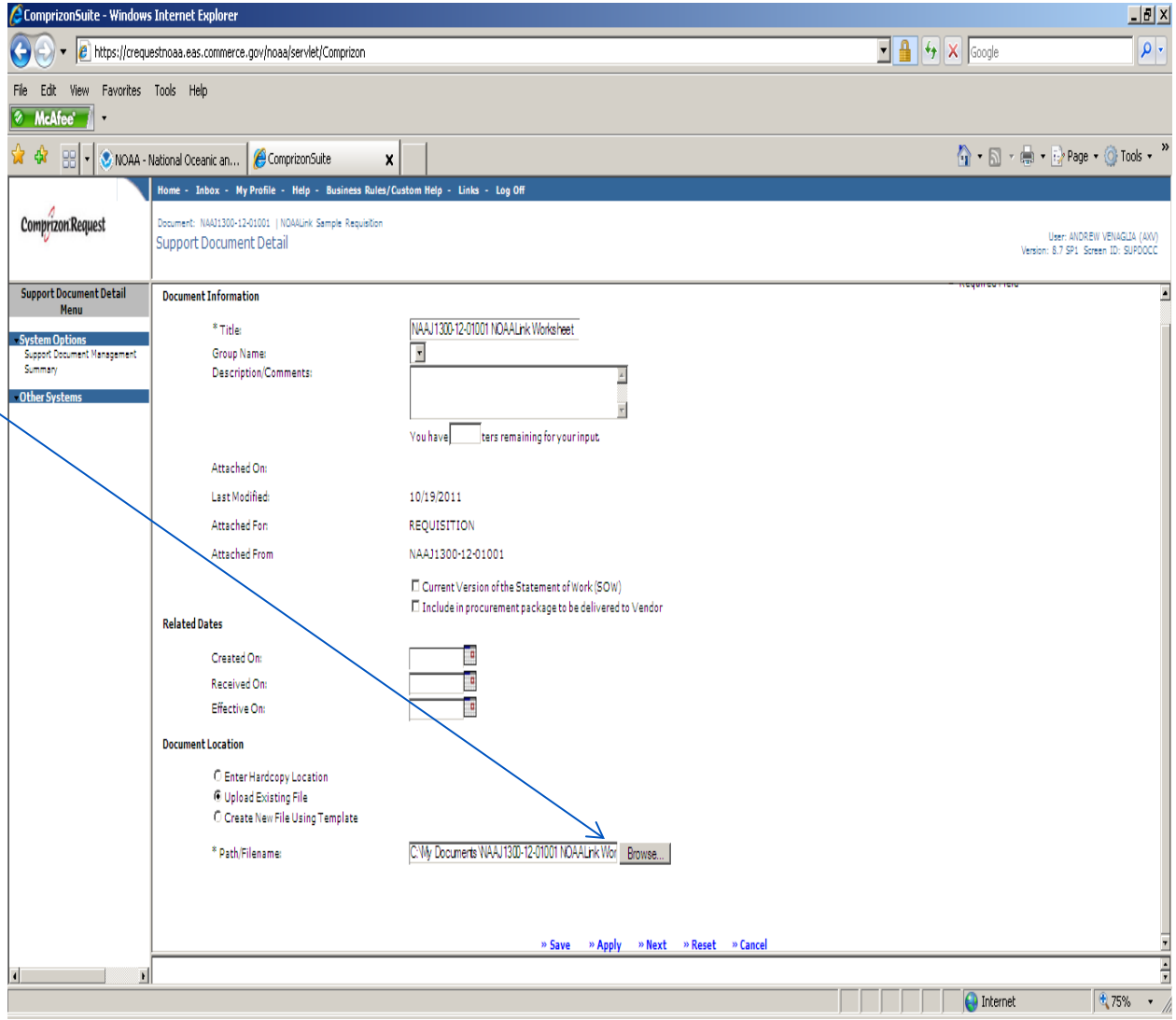
***Follow AGO guidelines on how to prepare an accurate IGCE on the NOAA IGCE Guide.

NOAALink Request Process: Complete a Requisition

15. Enter the Requisition Number, a hyphen, and NOAALink Worksheet as the title. Click Browse to attach a copy of the NOAALink Worksheet. Please name the NOAALink Worksheet by its Requisition

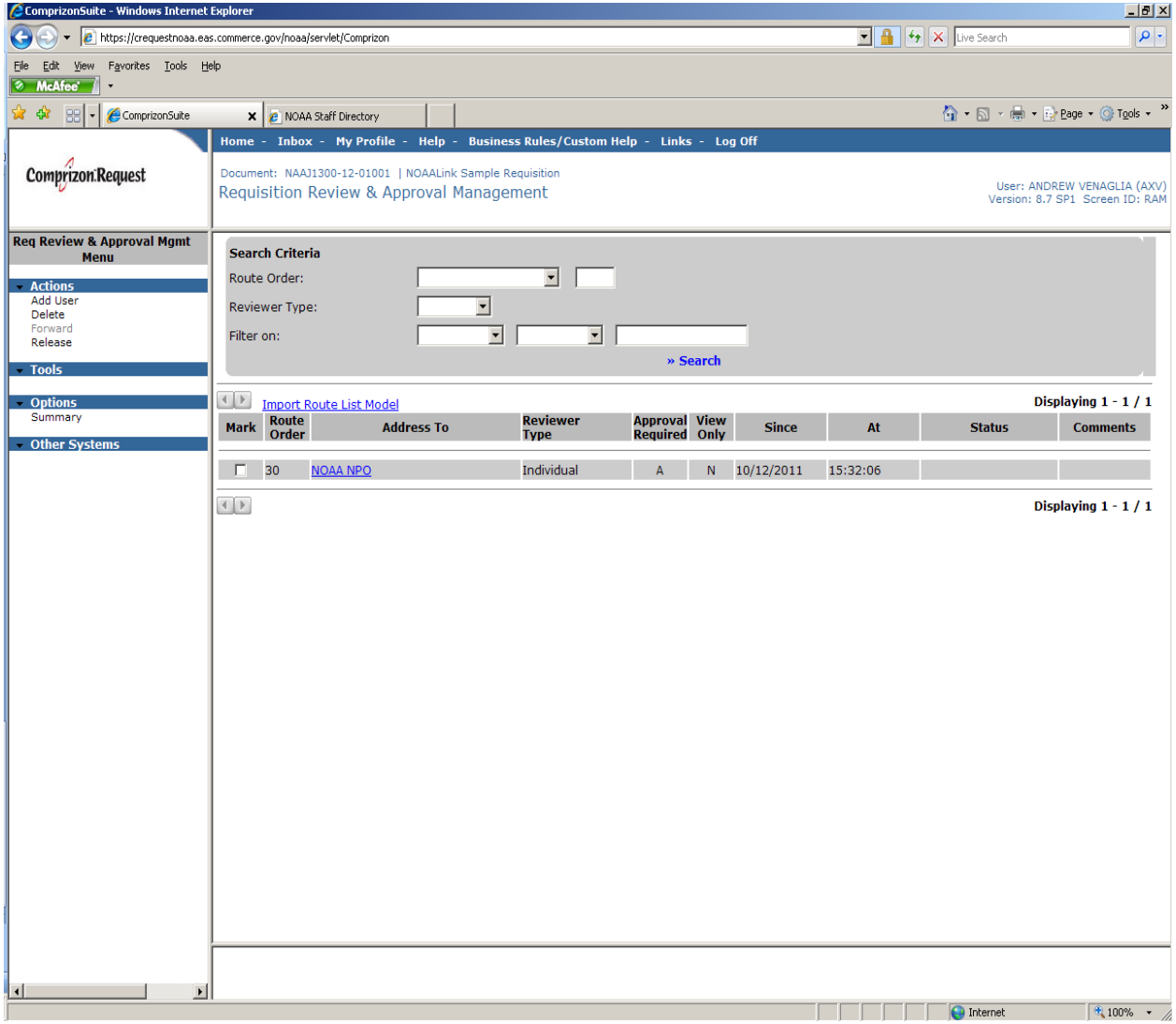
    (Req. #–NOAALink Worksheet)

16. Click Save



NOAALink Request Process: Complete a Requisition

17. Please make sure that your requisition is NOT Committed as NOAALink will be adding an attachment to your requisition
18. Select Release
19. Please instruct your office analysts and managers to review and approve the requisition that has been routed to them. The NOAALink Program Office will be notified when the requisition has reached the NPO inbox.



NOAALink Request Process
PO Request Verification

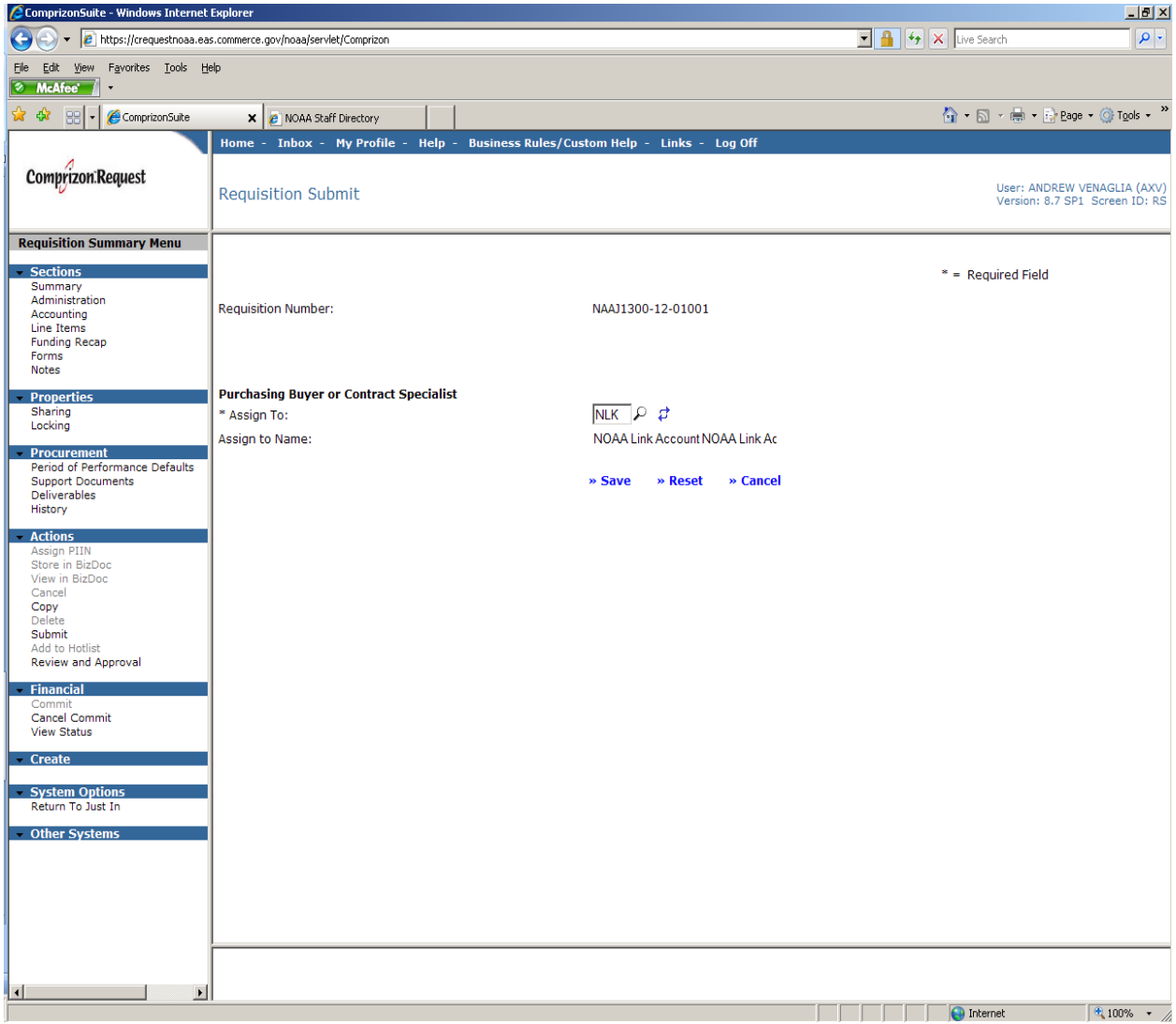
NOAALink Request Process: CIO Reviews

- IT Security
  - IT Security Checklist approvers

Threshold	Approver(s)
Any Amount	Line Office IT Security Officer (ITSO)
> $10 million	Director, IT Security Office

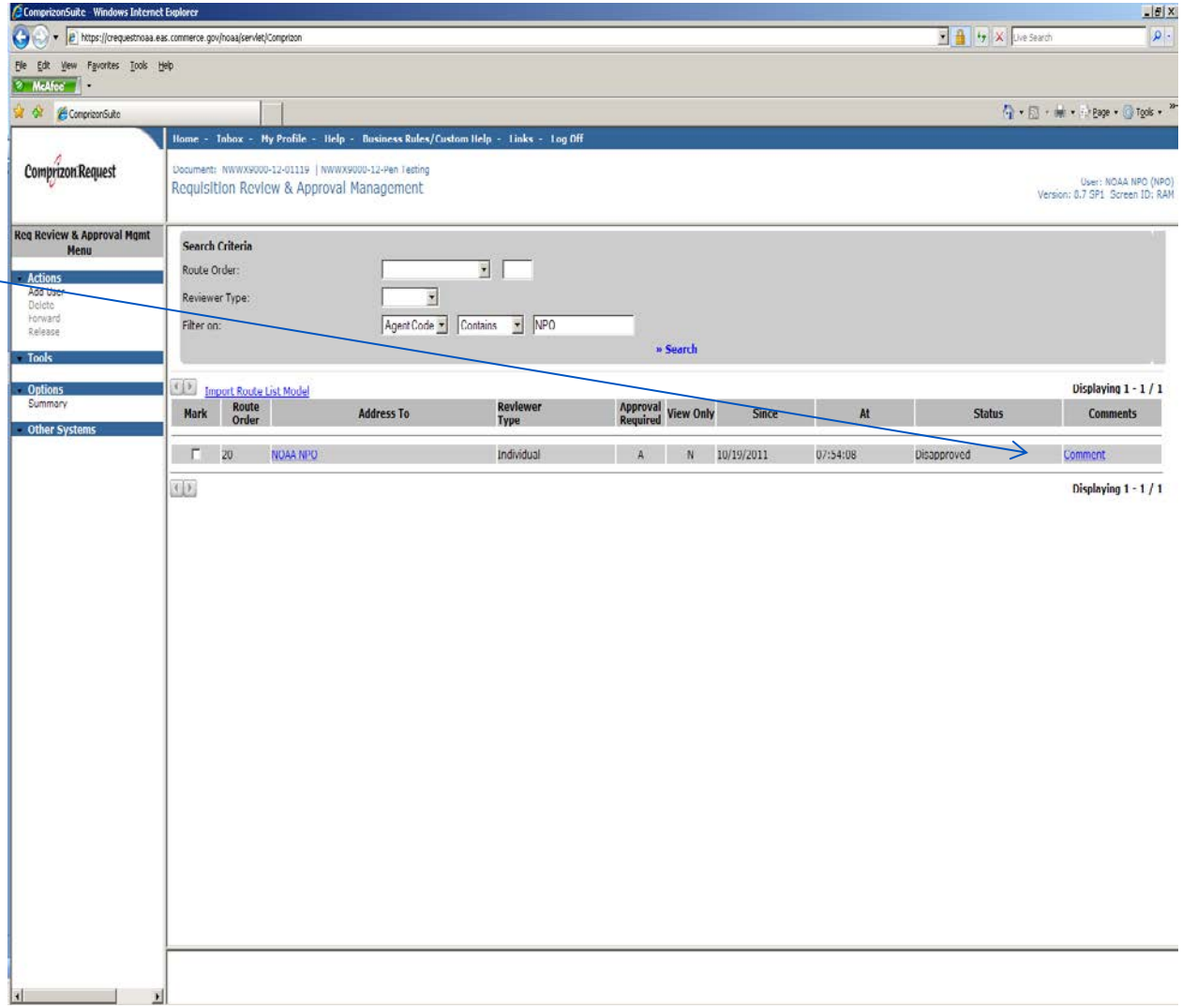
NOAALink Request Process: Request Verification

1. If funds are available and the accounting codes are appropriate, NPO will approve the requisition
   a) The NOAALink fee will be assessed on each line of accounting listed in the PR (object class code with 11 at the end)
2. You may add additional reviewers to the requisition, but please do NOT make any changes to the accounting. If any of the accounting strings or the dollar amounts change, you MUST re-route the requisition to NPO
3. Your office's Fund Certifier/Final Approval Official can commit and submit your requisition to NLK/ENT, local acquisition office, or field delegate as directed



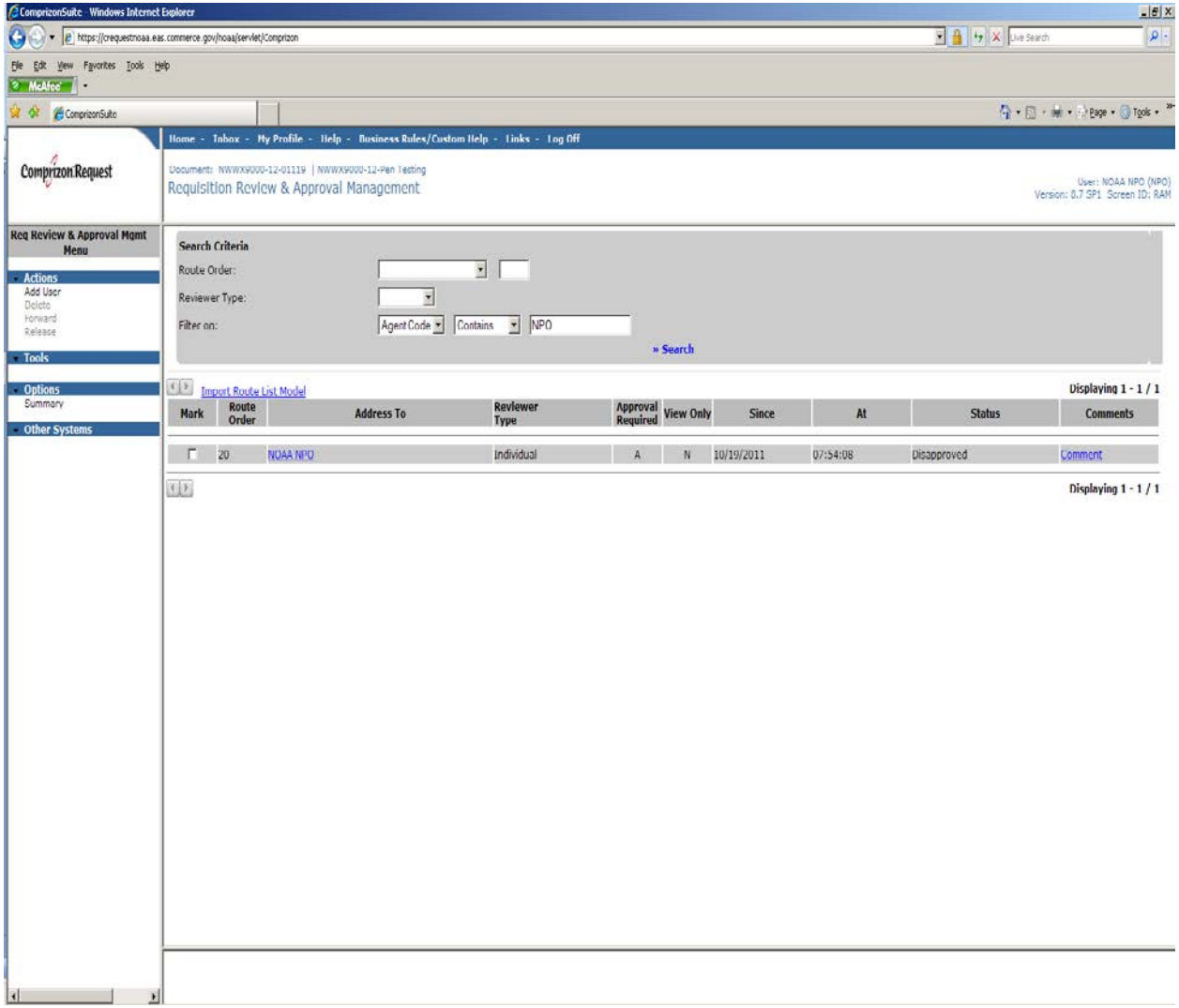
NOAALink Request Process: Request Verification

4. If the accounting codes are incorrect, NPO will disapprove the requisition and provide guidance in the comments section. To retrieve the comments, click the blue **Comment** field as seen in the adjacent screenshot
5. Once you have reviewed the comments, please correct the accounting and re-route the requisition to NPO



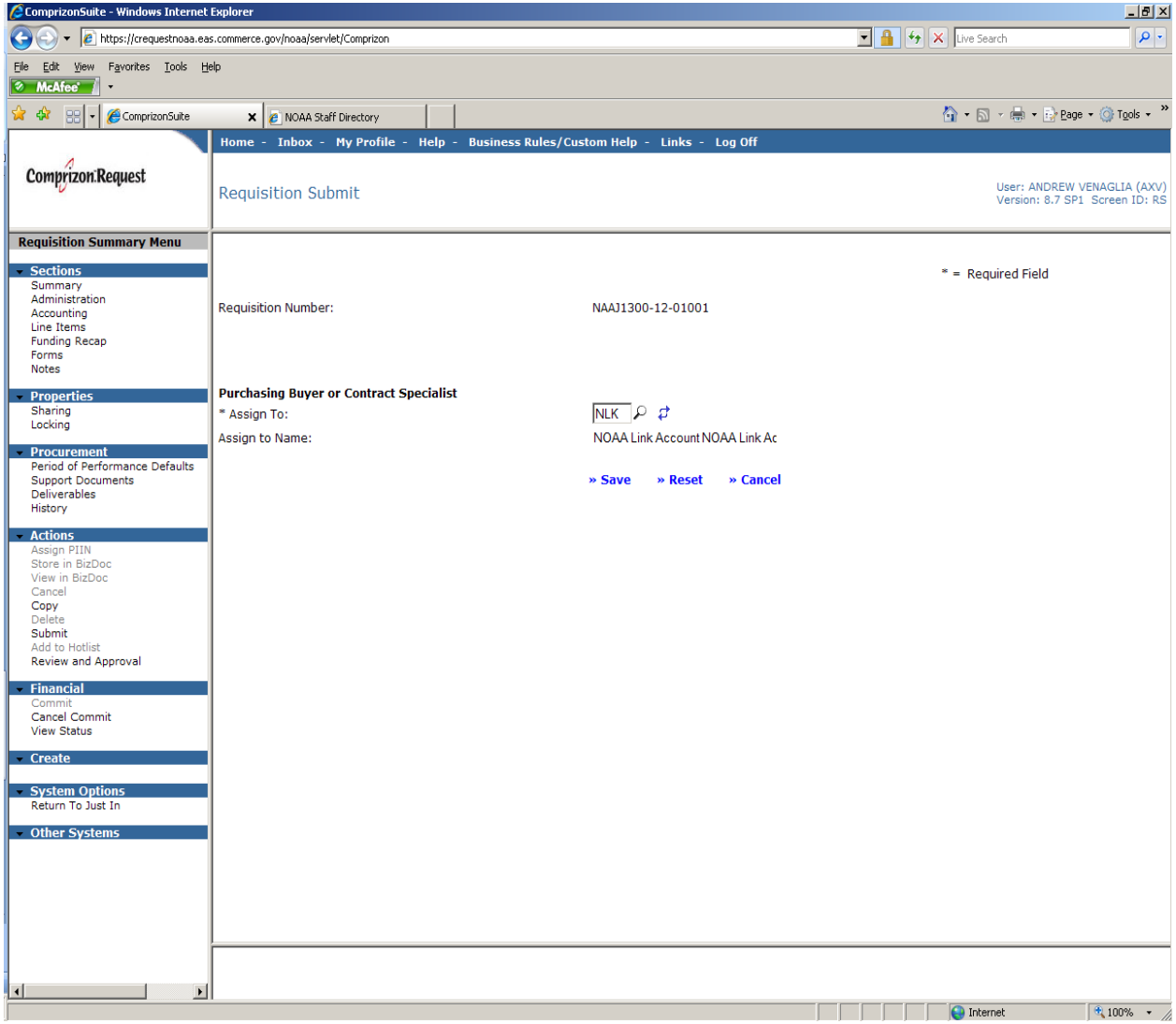
NOAALink Request Process: Request Verification

6. If the accounting is correct but funding is not available, further information may be requested from the customer or the Acquisition and Grants Office
   a) Depending on the circumstances, the requisition may be accepted but not awarded until funds are available
   OR
   b) The customer may change the accounting code to one that has funding available



NOAALink Request Process: Request Verification

7. If your requisition is NOT appropriate for NOAALink (i.e. a micro-purchase, PC/accessories, or office equipment), NPO will inform you via the comment field on the **Requisition Review and Approval** page. Additionally, your NOAALink Worksheet will be marked *Out of Scope* and re-attached to your requisition.
8. If the requisition is out of scope for NOAALink, please make sure to change the NOAALink-specific object class code (##-##-##-11 to ##-##-##-00). Otherwise, the requisition will still be assessed the NOAALink fee.
9. Your fund certifier/final approval official may submit your requisition to your local AGO office



NOAALink Request Process: Next Steps

- The CO will determine if your requirement can be successfully fulfilled by NOAALink contractors
  - If it is determined that it can, the CO will proceed with the standard NOAALink bid process
- If a particular requirement cannot be successfully fulfilled by NOAALink contractors, the CO will identify a suitable alternative acquisition vehicle
- Once a determination is made by the CO on a suitable acquisition vehicle, your request will be assigned to a Contract Specialist
  - The Contract Specialist will contact you within 48 hours of your submission being assigned to them
  - You may contact the Contract Specialist directly if you require any further assistance

NOAALink Request Process: Next Steps

- The Contract Specialist will open a bid period and issue an RFQ
  - HW/SW requests
    - The Task Manager verifies quotes against requirements
    - The Contract Specialist and Contracting Officer make a determination based on ‘best price technically acceptable’
  - Services requests
    - Technical Evaluation Committee reviews and scores the proposal
    - Technical Evaluation Committee makes a recommendation to Contract Specialist
    - Contract Specialist and Technical Evaluation Committee make a determination based on ‘best value’

NOAALink Request Process: Next Steps

- Upon award, you will receive a copy of the award document via email
  - Upon receipt, review the award document for any errors pertaining to delivery and contact information
  - If necessary, you may contact your Contract Specialist.

***If you are the designated Task Manager please attend NOAALink 101 **Post-Award Training**. Visit http://www.cio.noaa.gov/NOAALink/noaalink_training.html for scheduling information.

Final Note: Conflicts of Interest

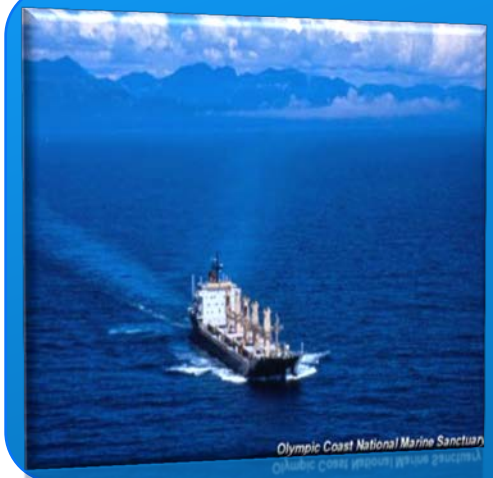
The potential for Conflicts of Interest exists for all NOAALink projects. Care should be taken to prevent Conflicts of Interest from arising.

If contacted by contractors, NOAALink users should:

- Be aware that contractors must interface only with the CS during the solicitation phase or risk exclusion from the requirement
- Refer contractors who attempt to make direct contact during the solicitation phase to the CS
- Always refer contractors who are interested in partnering with the NOAALink contractors to the CO

Questions?

- Contact the NOAALink PO: NOAALink.Help@noaa.gov or 301-628-5700
- Visit the NOAALink website: http://www.cio.noaa.gov/NOAALink/index.html
- Visit the AGO website: http://www.ago.noaa.gov
- Visit http://www.ago.noaa.gov/acquisition/c_request_training.html for C.Request training materials



Conclusion