
SIN 518210FM Agency Acquisition Guide

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Prepared by:
Financial Management Quality Service Management Office
Bureau of the Fiscal Service
U.S. Department of the Treasury



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1.0 Purpose

The Financial Management (FM) Quality Service Management Office (QSMO) Agency Acquisition Guide outlines processes, roles, and responsibilities for federal customer agencies (agencies) seeking to obtain commercial vendor (vendor) solutions and services from the FM QSMO Marketplace Catalog.

The General Services Administration (GSA) Multiple Award Schedule (MAS) **Special Item Number (SIN) 518210FM - Financial Management Quality Service Management Office (FM QSMO) Core Financial Management (FM) Solutions and Information Technology (IT) Professional Services** serves as the contract vehicle to acquire commercial vendor solutions and services from the FM QSMO Marketplace Catalog.

Once an agency has determined that a commercial vendor offering from the FM QSMO Marketplace Catalog will meet their needs, they should reference this guide for information pertinent to planning, initiating, executing orders, establishing Blanket Purchase Agreements (BPA) and subsequent orders against a BPA under **SIN 518210FM**.

In the event of a conflict between this guide and GSA MAS terms, the MAS terms have precedence.

- **What is the Agency Acquisition Guide?** A guide to acquire commercial vendor solutions and services from the SIN 518210FM
- **When should I use the guide?** Once you have identified that a **commercial vendor offering** best meets your agency's needs
- **Who should use this guide?** Federal agency acquisition and financial management professionals
- **Why should I use this guide?** To ensure that the unique steps for procuring commercial vendor solutions and services from SIN 518210FM are followed
- **Where should I go for more information?** Visit the *Customer Toolkit* section of the [FM QSMO Resources page](#) and contact the FM QSMO at FMQSMO@fiscal.treasury.gov

1.1 SIN 518210FM Overview

On April 26, 2019, the Office of Management and Budget (OMB) issued Memorandum 19-16, Centralized Mission Support Capabilities for the Federal Government. The memorandum introduced a new approach to federal government shared services by establishing QSMOs. On June 29, 2020, Treasury was designated as the QSMO for core financial management.

The FM QSMO focuses on brokering access to modern, standards-based solutions that move agencies away from outdated systems, improve government operations and performance and advance government-wide financial management goals, including improved transparency and better use of data for decision making. The FM QSMO Marketplace Catalog is comprised of financial management solutions and services offered by commercial vendors, federal shared service providers (FSSPs), and products and services offered by the Department of the Treasury's Bureau of the Fiscal Service.

This guide is intended to provide agency acquisition representatives and federal financial management professionals with the steps to obtain commercial vendor solutions and services from the FM QSMO Marketplace Catalog by executing orders, BPAs (and all subsequent orders against a BPA) under SIN 518210FM. **Agencies looking to obtain solutions or services from a FSSP or the Bureau of the Fiscal Service will not follow the SIN 518210FM acquisition process.**

GSA's Office of Information Technology Category, in collaboration with the FM QSMO, developed SIN 518210FM under the MAS program to serve as the mechanism through which agencies access FM QSMO Marketplace Catalog commercial vendor solutions and services.

SIN 518210FM provides a long-term contract vehicle for vendors and agencies and is available for vendors to onboard at any time.

1.2 Scope of SIN 518210FM

The scope of SIN 518210FM includes Core Financial Management Solutions (Core FS) and Financial Management (FM) solutions and services that are complementary to or augment Core FS and/or support agency modernizations. Offerings include financial management software suites in a cloud environment; services, applications, and modules that help agencies adopt FM QSMO solutions; and IT professional services and/or labor categories, software, cloud computing and IT training that support FM QSMO adoption.

SIN 518210FM Subgroups:

- **Core Financial Management Solutions (Core FS)** – Partially pre-configured commercial financial management software suites offered in a cloud environment. Core FS offerings that are determined acceptable to meet or exceed Core FS functionality scope and Financial Management Capability Framework (FMCF) standards that can accommodate agency-specific business needs.
- **Additional Financial Management (FM) Solutions** – Business capabilities that augment those provided by the Core FS Baseline Solution and have a correlation to Federal Financial Management (FFM) functions or activities. *[Examples include, but are not limited to, cost management solutions, reporting tools, business information exchange (BIE) solutions, FM business analytics and intelligence.]*
- **Financial Management (FM) Solution/Service Adoption and Transition Services** – Services to help agencies in identifying, selecting, acquiring, migrating to, and using FM QSMO Marketplace offerings effectively and efficiently. These services may also be needed when extensive or complex FM solution/service changes are released, or significant functionality is removed. *[Examples include, but are not limited to, strategy and planning, FM data conversion and migration, IV&V, readiness assessments, integration support, project management, and FM solution/service testing.]*
- **Financial Management (FM) Technology Operations Support Services** – Support and assist with technology implementation and operations. *[Includes FM technology development, testing, implementation, operations, and maintenance support, information exchanges between FM solutions and services and agency mission systems, service desk, related ancillary training, and support for legacy core financial systems. Items within scope of this subgroup: products, training, and professional services/labor categories.]*

Additional details about SIN 518210FM can be found in:

- [GSA's eOffer/eMod MAS Solicitation and Category Specific Attachments](#), and
- [FM QSMO Vendor Resources – SIN 518210FM](#).

2.0 SIN 518210FM Entry

Like other SINs under the GSA MAS Program, GSA's Federal Acquisition Service evaluates the general administrative, technical, and pricing elements of SIN 518210FM vendor submissions.

In contrast to other SINs, the FM QSMO is responsible for evaluating the technical elements of vendor submissions specific to SIN 518210FM. This additional vetting at the SIN level benefits agencies by ensuring that vendor offerings on SIN 518210FM adhere to the [Financial Management Capability Framework \(FMCF\)](#) and meet common government-wide financial management needs.

The [FM Solution/Service Evaluation Criteria](#) component of the [FMCF](#) guides the FM QSMO evaluation of vendors' offerings submitted for SIN 518210FM. The evaluation categories include the following:

- Business – evaluates the ability to achieve FM business outputs and outcomes using the FM solution/service; also evaluates conformance with FMCF business standards and requirements and usability of an FM solution.
- Technology Design – evaluates the FM solution/service technical architecture and design for servicing customers; also evaluates conformance with FMCF technical requirements and capabilities.
- Technology Operation – evaluates the FM solution/service's ability to respond to user demand and changes needed in the FM solution/service; also evaluates conformance with FMCF operational requirements and capabilities.
- Programmatic – evaluates a provider's strategy and management of FM solution/service offerings and delivery.
- Organizational – evaluates a provider's organizational ability to deliver quality FM solutions/services and ensure customer satisfaction.

Vendors proposing solutions for the Core FS SIN Subgroup undergo an additional FM QSMO evaluation by performing operational capability demonstrations.

Additional information can be found on the FM QSMO's [FMCF webpage](#) and in the [Guide to the FM QSMO Marketplace](#), which provides an overview of how the FM QSMO operates and how common financial management standards and capabilities apply to Marketplace Catalog offerings. The *Guide to the FM QSMO Marketplace* also includes a glossary of terms that may be helpful to reference throughout the acquisition process for Marketplace Catalog offerings.

3.0 SIN 518210FM Agency Acquisition Process

The agency acquisition process for SIN 518210FM expands on the GSA MAS ordering procedures with pre-solicitation and post-award activities and review by the FM QSMO Task Order Review Board (TORB). When obtaining solutions and services from SIN 518210FM, agencies follow the acquisition steps, described in Figure 1 below, and comply with their organization's acquisition policies and procedures. This applies for executing orders, blanket purchase agreements (BPAs) and all subsequent BPA orders.



Figure 1: SIN 518210FM Acquisition Process



Step 1. Define Requirements



Figure 2: Define Requirements

Agencies perform a requirements analysis and develop draft requirements.

Beyond the FM QSMO Marketplace entry level requirements for SIN 518210FM, agencies **may establish and incorporate additional requirements into their solicitations.**

Provider Service Measure Reporting Requirements

The FM QSMO developed the [FM Provider Service Measures](#) component of the [FMCF](#) to define how the government measures successful vendor delivery of outcomes based on timeliness, efficiency, and accuracy targets. For vendor provided solutions and services, the FM QSMO will monitor the three service measures listed in Table 1. At a minimum, the measures in Table 1 should be included in the agency solicitation and resulting contract. To capture and report on vendor service measure results, agencies may consider using the below example provision in solicitations and contract requirements:

“The contractor is responsible for meeting the Provider Service Measure requirements, as established by the Financial Management Capability Framework. These responsibilities include delivering the services required by [this acquisition], measuring the provider service measures, maintaining the service at specified service measure target levels, and reporting on compliance with the service measure target level.

The contractor will provide an annual report that documents each target by name, the service measure target level, and the actual performance during the reporting interval, and corrective actions for any non-compliant service measures. The contractor shall prepare a draft report and submit it to the [government agency] for review and approval. The report will be sent to the FM QSMO via [method].”

The results for these three (3) service measures are to be provided to the FM QSMO during the Administer Contract phase (Step 6). The FM QSMO may receive service measure results directly from the agency or from vendors with agency approval.

Service Measure Name	Service Measure Description	Service Measurement Formula	Service Measurement Frequency	Service Measure Target
Service Measure Target Success Ratio (FFM)	% of provider service measure targets met	The number of service measure targets met divided by the total number of service measure targets	Annual	>98%
Service Customer Satisfaction with Service Provider	% of Service Customers rating Service Provider as a 5	Count of Service Customers rating Service Provider as a “5” divided by Total count of Service Customers providing a rating for the Service Provider	Annual	>=80%
Service Customer Satisfaction by Solution/Service Package (FFM)	% of Service Customers rating each solution / service package as a favorable (score of 4 or 5)	Customer survey results rating the solution / service package provided as a 4 or 5 divided by the total number of respondents to the customer survey	Annual	>=80%

Table 1: FM QSMO-Monitored Provider Service Measures

Agencies are also encouraged to assess and establish additional performance measures, other than those stated in Table 1, from the *FM Provider Service Measures* during the acquisition process (e.g., service desk response time, month end processing time, security threats identified volume, etc.).

Additionally, when defining evaluation factors, the *FM Solution/Service Evaluation Criteria* also includes options for evaluation criteria and indicators for agencies to incorporate into their solicitations. For example, an agency’s evaluation criteria may also include documentation and, if required, demonstration that the FM solution will enable completion of FFM business activities within target timeframes or documentation that provides rationale for software additions to the baseline solution/service.

New **Step 2. Research and Plan with the FM QSMO**



Figure 3: Research and Plan

Agencies research through the FM QSMO Marketplace Catalog and engage with the FM QSMO on available offerings, share information gathered from market research activities, such as requests for information (RFI), and assess the ability of Marketplace Catalog offerings to meet business, capability, and requirement needs. Agencies may also consult with the FM QSMO when preparing their solicitation documents, prior to submitting them for TORB review (reference Step 3).

Agency acquisition professionals should confirm that their finance office has actively engaged with the FM QSMO and developed requirements that align with the FMCF, including service measures that are monitored by the FM QSMO and those chosen by the agency (see below 6. Contract Administration).

GSA tools such as [Market Research As-a-Service](#), [GSA eLibrary](#) and [GSA Advantage!®](#) may also assist the research process.

New **Step 3. Submit Requirements Documents for TORB Review**



Figure 4: Submit for TORB Review

The FM QSMO established the TORB to ensure that acquisitions through SIN 518210FM adhere to the FMCF. Once agencies solidify requirements, the TORB process described below is followed:

Step 3.1 Submit TORB Intake Form

The [FM QSMO TORB Intake Form](#) is completed prior to solicitation for all orders, BPAs, and all subsequent orders against a BPA.

Before starting the [FM QSMO TORB Intake Form](#), agencies:

- Review FM QSMO Marketplace resources, including the FM QSMO Marketplace Catalog and Customer Toolkit.
- Engage with the FM QSMO to assess the solutions and services available in the FM QSMO Marketplace Catalog.
- Have requirements documents (e.g., a performance work statement (PWS), statement of work (SOW) and current version supplemental acquisition materials (e.g., acquisition plan) ready to submit through the TORB Intake Form.

At minimum, agencies submit requirements documents (e.g., PWS, SOW, SOO) including service measures (reference [FM Provider Service Measures](#)), as well as a copy of the BPA for all subsequent orders against a BPA. Agencies may also submit current versions of supplementary acquisition materials (e.g., acquisition plan, Independent Government Estimate (IGE), Agency Level Evaluation Criteria).

Step 3.2 Review by FM QSMO TORB

The FM QSMO TORB reviews the FM QSMO TORB Intake Form submissions and assesses if the requirements align with the FMCF.

- Acquisitions that include the Core FS SIN Subgroup are reviewed within 13 business days.
- Acquisitions that do not include the Core FS SIN Subgroup are reviewed within 8 business days.

The FM QSMO TORB contacts agencies with the results of the assessment:

- If the requirements align with the FMCF, the FM QSMO TORB provides feedback for agencies to proceed. The FM QSMO TORB also provides suggestions to improve the requirements based on best practices or lessons learned from other agencies.
- If the requirements do **not** align with the FMCF, the FM QSMO TORB recommends changes. Agencies address the recommended changes and resubmit the requirements for FM QSMO TORB review and additional feedback.

Step 4. Finalize and Issue Solicitation



Figure 5: Finalize and Issue Solicitation

Once response is received after the FM QSMO TORB review, agencies may move forward with finalizing the solicitation.

Contracting officials should confirm with their finance office that the FM QSMO has completed a review of the requirements and received feedback from the FM QSMO TORB prior to issuing the solicitation.



Step 5. Select & Award



Figure 6: Select & Award

Agencies evaluate the responses received and award the contract.

Once the award is made, agencies provide a copy of the order, BPA, and any subsequent BPA orders by email to the FM QSMO at FMQSMO-Marketplace@fiscal.treasury.gov.



Step 6. Administer Contract



Figure 7: Administer Contract

Agencies monitor contractor performance and ensure that provider service measures are tracked and reported to the FM QSMO. The FM QSMO may receive service measure results

directly from the agency or from vendors with agency approval.

Provider Service Measure Reporting Requirements

As also described in Step 1, the FM QSMO developed the [FM Provider Service Measures](#) component of the [FMCF](#) to define how the government measures successful vendor delivery of outcomes based on timeliness, efficiency, and accuracy targets. For vendor provided solutions and services, the FM QSMO monitors the three (3) service measures, listed in Table 1. Throughout the contract, agencies and their vendors track the provider service measures. Once provider service measure results have gained agency concurrence, the results for these three (3) services measures are provided to the FM QSMO.

Service Measure Name	Service Measure Description	Service Measurement Formula	Service Measurement Frequency	Service Measure Target
Service Measure Target Success Ratio (FFM)	% of provider service measure targets met	The number of service measure targets met divided by the total number of service measure targets	Annual	>98%
Service Customer Satisfaction with Service Provider	% of Service Customers rating Service Provider as a 5	Count of Service Customers rating Service Provider as a "5" divided by Total count of Service Customers providing a rating for the Service Provider	Annual	>=80%
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Table 2: FM QSMO-Monitored Provider Service Measures

Step 7. Closeout



Figure 8: Closeout

Agencies close out acquisition files in accordance with federal acquisition regulations and agency policies and procedures.

4.0 Support for the FM QSMO Marketplace Acquisition

- FM QSMO experts are available to advise agencies on the SIN 518210FM acquisition process.
- The FM QSMO team is also available to conduct a scope review before requirements are submitted through the TORB process and provide subject matter expert (SME) reviews.
- For more information on how to order from GSA's MAS Information Technology Category, please visit: <http://www.gsa.gov/portal/content/198589>.
- Visit the "Customer Toolkit" section of the FM QSMO Resources page and contact the FM QSMO at FMQSMO@fiscal.treasury.gov to learn more.

Appendix

SIN 518210FM Management: Develop and manage an acquisition solution for the FM QSMO Marketplace.

FM QSMO	GSA
<ul style="list-style-type: none"> • Evaluate technical elements of vendor submissions specific to SIN 518210FM. • Provide technical oversight and guidance to agencies transitioning and migrating through FM QSMO. • Assist agencies in planning for transition from existing contract vehicles to FM QSMO SIN. • Support GSA on future changes to the SIN as needed to support the FM QSMO Marketplace. • Conduct periodic reviews of SIN 518210FM vendors and vendor offerings. 	<ul style="list-style-type: none"> • Perform duties as the contracting authority, maintain the SIN and perform vendor management in accordance with MAS policy.

Table 3: Roles and Responsibilities - SIN Management

Agency Acquisition Management: Acquisition of Marketplace solutions and services following established processes and requirements.

FM QSMO	Federal Agency Customer	Vendor
<ul style="list-style-type: none"> • Manage a Task Order Review Board (TORB) to review agency solicitation requests for adherence to the FMCF; ensure FM QSMO and other appropriate service measures are included, recommend improvements, and provide feedback for moving forward with the acquisition process. • Manage the structure, scope, and processes associated with the TORB. • Consult and coordinate with agencies ready to initiate Marketplace acquisitions. • Provide customers with assistance in navigating the FM Marketplace Catalog. • Review agency submitted requirements to ensure adherence with the FMCF and best practices. • Provide feedback to federal agency customers to revise the acquisition request. 	<ul style="list-style-type: none"> • Develop and maintain an acquisition plan and ensure requirements align with the FMCF. • Include FM QSMO and other appropriate provider service measures in BPAs and Task Orders. • Prior to solicitation, submit request and applicable documentation through the FM QSMO TORB Intake Form. • Respond to TORB comments and feedback on the proposed acquisition. • Resubmit acquisition documents to the TORB, if necessary. • Proceed with acquisition following TORB feedback. • Monitor contractor performance, report performance results and other vendor feedback when requested. • Provide required FM Provider Service Measures to the FM QSMO according to defined frequencies. 	<ul style="list-style-type: none"> • Respond to agency task orders approved by the TORB. • Report performance metrics as specified by the federal agency customer service agreement, contract award, and FMCF.

Table 4: Roles and Responsibilities - Agency Acquisition Management