



DEPARTMENT OF THE AIR FORCE

Headquarters Air Force Materiel Command
Wright-Patterson Air Force Base Ohio

6 AUG 1997

MEMORANDUM FOR SEE DISTRIBUTION

FROM: HQ AFMC/DRM
4375 Chidlaw Road, Suite 6
Wright-Patterson AFB OH 45433-5006

SUBJECT: Advisory and Assistance Services (A&AS) Querying Procedures

1. We have revised the AFMC procedures for conducting A&AS queries to define key terms, add a section on responsibilities, and in general allow the centers as much flexibility as possible in conducting the query. These procedures are available on the HQ AFMC/DRMP home page at URL <http://afmc.wpafb.af.mil/HQ-AFMC/DR/drm/drmp>. We have also included a copy of the Jan 97 draft of the DoDD 4205, *Acquiring and Managing Advisory and Assistance Services*, on the HQ AFMC/DRMP home page. Although a draft, SAF/AQX has approved using the directive. For your additional information, we have included a link to the HQ AFMC/PKP home page to provide access to the following items: Services Contracting (general information and references); Conflicts of Interest; Inherently Governmental Functions; Personal vs. Nonpersonal Services Contracts; and Statement of Work Preparation. Please disseminate this information to organizations at your center that are involved in managing A&AS.

2. HQ AFMC/DRMP point of contact for this memo is Mr. Eric Van Pelt, DSN 787-7280.

FOR THE COMMANDER


DANIEL L. KUGEL
Chief, Product Management Division
Directorate of Requirements

cc:
HQ AFMC/PKPA

ADVISORY AND ASSISTANCE SERVICES (A&AS) QUERYING PROCEDURES

The following procedures are provided to supplement the Air Force A&AS Interim Policy relative to querying for A&AS requirements. These procedures address the two types of A&AS: a) that used for general advice and assistance, hereafter referred to as "general A&AS," and which is usually for a relatively long period of time (e.g. one year or longer), and, b) that used in support of initial contract award proposal evaluation and analysis (ICAPEA), hereafter referred to as "A&AS in support of ICAPEA," and which is usually for a relatively short period of time (e.g., several months). Identifying A&AS requirements and performing the necessary queries are new A&AS management requirements; hence the need for this additional AFMC guidance. Centers may issue local procedures on A&AS querying.

A. TERMS:

1. Querying focal point - the person responsible for ensuring that a capability exists at a center to respond to A&AS queries.
2. Functional resource owners - the organizations responsible for managing functional personnel, sometimes referred to as functional home offices.
3. Organic resources - military or civilian personnel who are employed by the federal government. (The term "in-house resources" is not used because it connotes people who work for a particular program office or center organization. The term "organic resources" is much broader; hence its use in this document.)
4. Requiring activity - the organization which identifies a requirement for A&AS.

B. RESPONSIBILITIES:

1. Querying focal point will:
 - a. Be knowledgeable about A&AS.
 - b. Ensure a capability exists at a center to respond to A&AS queries.
 - c. Determine local procedures for handling A&AS queries.
2. Requiring activity will:
 - a. Identify requirements for A&AS.
 - b. Determine whether the query will address the entire contract or some portion thereof.

- c. Conduct the query

C. PROCEDURES:

1. To facilitate the A&AS querying process, AFMC has established A&AS querying focal points (see Atch 1). While the focal point is free to determine the most appropriate approach for providing a response to a query, two possible approaches become readily apparent.

- a. If a large number of queries is anticipated, the focal point may wish to survey functional resource owners at a center, on a fiscal year basis, to determine availability of personnel to satisfy potential A&AS queries. Atch 2 provides a sample survey memo which addresses requirements for both general A&AS and A&AS in support of ICAPEA. Attached to the sample survey memo is an A&AS survey sheet on which the functional resource owner may identify available resources. The querying focal point may modify the sample survey memo and the survey sheet as desired. If this survey approach is selected, it is important that the querying focal point maintain a concise record of the responses from the functional resource owners. This approach will reduce the day-to-day workload for the querying focal point and will facilitate a quick response to an A&AS query.

- b. If a small number of queries is anticipated, the querying focal point may contact the functional resource owner(s) when queries are received to determine availability of organic resources. This approach will provide "just in time" information with which to respond to the query, but is more labor intensive than the survey approach. This is the recommended approach for responding to queries for A&AS in support of ICAPEA.

[Note: At some centers, the manpower office may play a part in determining resource availability. The querying focal point may wish to contact the manpower office in addition to the functional resource owners.]

2. To accomplish the query, the requiring activity identifies A&AS requirements in terms of man-year equivalents, skills needed, and the period of performance (see Air Force Interim Policy, Appendix 3 for more detailed information). After identifying the requirements, the requiring activity conducts a query that searches for readily available organic resources with the requisite training and capabilities to accomplish the A&AS work prior to the release of the request for proposal for any A&AS contract or task order. (For purposes of the query, system support manager (SSM) and development support manager (DSM) resources shall be considered an integral part of the single manager (SM) organization.) Conducting the query will require judgment on the part of the requiring activity. It is neither possible nor expected that the requiring activity will contact every AFMC organization for available resources. However, it is expected that the requiring activity will exercise judgment and "due diligence" in conducting the query.

3. These queries may be conducted at the contract level, the task order level, or for a group of task orders, whichever is more appropriate.

a. When a decision is made to query at the task order level, the requiring activity may document that decision in the Acquisition Plan or the Single Acquisition Management Plan and proceed with the release of the contract request for proposal (RFP). This action will be considered as satisfying the requirement to conduct a query prior to release of the RFP and should speed up the contract award process.

b. If an organization that manages and/or controls a task order contract (e.g., an Information Analysis Center) is providing A&AS support on a task order basis to a number of requiring activities from other MAJCOMs, services, or agencies and, based on historical usage data, is able to forecast cumulative requirements for those A&AS task orders for a period of time (e.g., one year), the organization may conduct a single query for that forecasted, cumulative A&AS requirement rather than querying for each individual task order as it arises. This will satisfy Air Force requirements with regard to querying and will relieve the organization of *de facto* responsibility for A&AS training and enforcing compliance among other services or agencies with Air Force A&AS policy.

c. For Foreign Military Sales (FMS) programs, if the country specifically requested A&AS in the Letter of Agreement (LOA), then no query is required before contracting for the A&AS. If the LOA does not address A&AS, then the query is required.

4. Specific procedures for conducting queries for general A&AS and for A&AS in support of ICAPEA are provided below.

a. For general A&AS:

(1) The requiring activity should communicate the A&AS requirement to the appropriate querying focal points to search for organic resources within:

(a) The requiring activity's center.

(b) One other AFMC center or HQ AFMC. (It is recommended that this "one other AFMC center" be the center where the SSM, the DSM, or the SM is located. This center should already be familiar with the program and associated technologies and therefore should have less of a "learning curve" than another center.)

b. For A&AS in support of ICAPEA:

(1) The requiring activity should communicate the A&AS requirements to the appropriate querying focal points to search for organic resources within:

(a) The requiring activity's center.

(b) One other AFMC center or HQ AFMC. (It is recommended that this "one other AFMC center" be the center where the SSM, the DSM, or the SM is located. This

center should already be familiar with the program and associated technologies and therefore should have less of a "learning curve" than another center.)

(c) One other Federal Agency outside the Air Force (e.g., Army, Navy, NASA, etc.). (Unfortunately, the other services and Federal Agencies have not established querying focal points. Therefore, the requiring activity should contact another agency or service which has a similar function, mission, or product line. Forward the A&AS requirement to the functional resource owner (if known) or to the organization commander. (For example, if an ESC program office needed to query another agency or service for support of an initial contract award proposal evaluation of a ground communication-electronics system, it could forward the requirement to the CECOM functional resource manager, if known, or to CECOM/CC. CECOM, located at Ft Monmouth NJ, is the Army's ground communication-electronics acquisition organization.))

5. If organic resources are available, the response to the requiring activity shall contain the name, address, and telephone number of the functional resource owner. Thereafter, the requiring activity shall communicate directly with the functional resource owner to verify suitability of the available resources and to agree on the terms of the loan.

a. For organic resources available from an AFMC organization:

(1) The supporting activity shall retain the authorization on its unit manning document.

(2) The requiring activity shall provide for the costs associated with borrowing the organic resources.

(3) For rating/appraisal purposes, if applicable, the first level supervisor in the requiring activity shall prepare the evaluation; the second level supervisor in the supporting activity shall approve the evaluation.

b. For organic resources available from a non-AFMC organization, the requiring activity shall negotiate with that non-AFMC organization to obtain mutually agreeable terms. Document the terms of the loan in a memorandum of agreement or other suitable vehicle.

6. In addition, if organic resources are available, the requiring activity must prepare a cost comparison between performing the work with organic resources versus A&AS contract resources. For organic resources, use the cost comparison tables in AFI 65-503, *Composite Rate Tables*, to ensure currency of cost data. (A copy of these tables was included as Appendix 5 in the SAF/AQX Interim Guidance.) For the A&AS resources, use cost data from a similar, recent A&AS contract, since cost data for the draft request for proposal will not be available.

Attachments: (listed on next page)

Attachments:

1. Querying Focal Points
2. Sample Functional Resource Owner Survey Memo
3. Sample Query Memo

FOCAL POINTS FOR
ADVISORY AND ASSISTANCE SERVICES (A&AS)
QUERYING REQUIREMENTS

MR. ERIC VAN PELT
HQ AFMC/DRMP
4375 CHIDLAW ROAD, SUITE 6
WRIGHT-PATTERSON AFB OH 45433-5006
DSN: 787-7280 FAX: 986-1242
E-MAIL: evanpelt@wpgate1.wpafb.af.mil

MR. JOHN SUTTON
AEDC/PKM
100 KINDEL DRIVE, SUITE A-337
ARNOLD AFB TN 37389-1337
DSN: 340-5408 FAX: 340-7330
E-MAIL: suttonjl@hap.arnold.af.mil

MR. DAVID LAMBERT
AFDTC/PKC
205 WEST D AVENUE, SUITE 433
EGLIN AFB FL 32542-6864
DSN: 872-9403 FAX: 872-1873
E-MAIL: lambertd@eglin.af.mil

MR. HARRISON C. MOORE
AFFTC/PK
5 SOUTH WOLFE AVENUE
EDWARDS AFB CA 93524-1185
DSN: 527-2006 FAX: 527-3784
E-MAIL: moore%pk@mhs.elan.af.mil

MR. CHUCK CHATLYNNE
AFOSR/PIP
110 DUNCAN AVENUE, SUITE B115
BOLLING AFB DC 20332-0001
DSN: 297-8018 FAX: 297-4961
E-MAIL: chuck.chatlynn@afosr.af.mil

MS. ROSE MALCHER
AL/FM
2509 Kennedy Circle
Brooks AFB TX 78235-5118
DSN: 240-5689 FAX: 240-5233
E-MAIL: rose.malcher@platinum.brooks.af.mil

MR. STEVE MACH
ASC/CDSY BULIDING 22 N
2690 C STREET
WRIGHT-PATTERSON AFB OH 45433-7642
DSN: 785-1783 FAX: 5-3225
E-MAIL: thorstmb@asc.wpafb.af.mil

MR. DICK AXTELL
ESC/AXK
5 EGLIN STREET
HANSCOM AFB MA 01731-2116
DSN: 478-6848 FAX: 478-7033
E-MAIL: axtell@v5.hanscom.af.mil

cc:
MR. JOHN MOONAN
ESC/MO
115 EGLIN ST
HANSCOM AFB MA 01731-1610
DSN: 478-4416 FAX: 478-8746
E-MAIL jmoonan@vs1.hanscom.af.mil

COL DAVID LAWRENCE
HSC/PK
2510 KENNEDY CIRCLE SUITE 220
BROOKS AFB TX 78235-5120
DSN: 240-6312 FAX: 240-4253
E-MAIL: david.lawrence@pkccmail.brooks.af.mil

MS. PAMELA HELDERMAN
OC-ALC/FMIBB
3001 STAFF DRIVE SUITE 1AH82A
TINKER AFB OK 73145-3051
DSN: 339-5543 FAX: 336-3386
E-MAIL: phelderm@podmm.tinker.af.mil

MS. KATHY MANNING
OO-ALC/PK-3
7920 GEORGIA STREET, BLDG 1146
HILL AFB UT 84056-5823
DSN: 777-5540 FAX: 777-5514
E-MAIL: manningk@hillwpos.hill.af.mil

MS. KATE FRY
PL/XPP
2251 MAXWELL SE
KIRTLAND AFB NM 87117-5773
DSN: 246-5776 FAX: 246-5442
E-MAIL: fryk@plk.af.mil

MR. VINCENT PALMIERO
RL/PKP
26 ELECTRONIC PARKWAY
ROME NY 13441-3514
DSN: 587-7746 FAX: 587-4728
E-MAIL: palmierov@rl.af.mil

MR. JOHN CONSTANTINO
SA-ALC/FMIO
485 QUENTIN ROOSEVELT ROAD
KELLY AFB TX 78241-6425
DSN: 945-3011 FAX: 945-5960
E-MAIL: jconstant@fmgate1.kelly.af.mil

CAPT HEATHER LANDON
SM-ALC/FMIC(3)
3237 PEACEKEEPER WAY SUITE 21
MCCLELLAN AFB CA 95652-1006
DSN: 633-5132 FAX: 633-3399
E-MAIL: landonhe@smdis01.mcclellan.af.mil

MS. LAURI SMITH
SMC/AXC
160 SKYNET SUITE 2315
LOS ANGELES AFB CA 90245-4683
DSN: 833-3235 FAX: 833-0084
E-MAIL: smithl@post6.laafb.af.mil

DR. WILLIAM BORGER
WL/CD BUILDING 45
2130 EIGHTH STREET SUITE 11
WRIGHT-PATTERSON AFB OH 45433-7525
DSN: 785-5508 FAX: 785-6641
E-MAIL: borgerwu@wl.wpafb.af.mil

MR. WIL UNDERWOOD
WR-ALC/MQM
480 SECOND STREET SUITE 200
ROBINS AFB GA 31098-1640
DSN: 468-4383 FAX: 468-6214
E-MAIL: wunderwo@manpower.robins.af.mil

Attachment 2

MEMORANDUM FOR SEE DISTRIBUTION

FROM:

SUBJECT: Determining Ability to Satisfy Advisory and Assistance Services (A&AS)
Querying Requirements (SUSPENSE: _____)

1. To enhance the use of our organic resources and reduce the need for services contracts, Air Force interim policy on A&AS directs that organizations requiring support query for availability of organic resources to satisfy their requirements. These requirements may be for two types of A&AS support: a) general A&AS support which would be of a relatively long (one year or longer) duration, and b) A&AS in support of initial contract award proposal evaluation and analysis (ICAPEA), generally thought of as source selection support, which would be of a shorter (usually only several months) duration. The principal functional areas in which requirements for A&AS support have arisen in the past include configuration management, cost estimating, data management, engineering, financial management, logistics, manufacturing, program management, risk analysis, software engineering, systems analysis, and test.
2. To enable us to respond to these A&AS queries quickly and with minimal disruption to your organizations, please identify on the attached survey form the number, GS-series, and grade of organic resources who would be available during FY__ to support A&AS requirements. Please provide the requested information by _____.
3. Thank you for your assistance in this matter. Point of contact for this memo is _____.

Attachment:
Survey Form

DISTRIBUTION:

FY__ A&AS SURVEY

Office/Organization: _____

Functional Area: Resource Availability by GS-Series and Grade:

1st Qtr: 2nd Qtr: 3rd Qtr: 4th Qtr:

Config Mgmt:

Cost Estimating:

Data Mgmt:

Engineering:

Financial Mgmt:

Logistics:

Manufacturing:

Program Mgmt:

Risk Analysis:

Software Eng:

Systems Analysis:

Test:

Other:

Comments:

Attachment 3

MEMORANDUM FOR SEE DISTRIBUTION

FROM:

SUBJECT: Advisory and Assistance Services (A&AS) Query for the _____ Program
(SUSPENSE: _____)

1. Air Force A&AS Interim Guidance directs that organizations requiring A&AS support must first perform a query to search for readily available organic resources to accomplish the A&AS work. This query must be performed prior to release of the request for proposal for the A&AS contract or task order.
2. The A&AS requirements for the _____ Program are attached. Please advise on the availability of organic resources at your center to satisfy all or part of this requirement. Please provide the requested information by _____.
3. Thank you for your assistance in this matter. Point of contact for this memo is _____.

Attachment:

_____ Program A&AS Requirements

DISTRIBUTION: