

# Project Management

## Procurement & Grants Office Processes

The Procurement and Grants Office (PGO) plays a vital role in furthering CDC's mission to promote public health and improve the quality of life by preventing and controlling disease, injury, and disability. PGO's acquisition and assistance activities enable CDC's centers, offices, and institutes (CIO) to implement health related programs, initiatives, and if needed, acquisitions. PGO also protects the public trust by ensuring the integrity, efficiency and effectiveness of the financial assistance and acquisition processes. PGO provides non-programmatic management and support for all CDC financial assistance activities (grants and cooperative agreements), and manages and awards all CDC contracts.

CDC CIO's are tasked with projecting their next fiscal year's requirements. The practice of contract planning and forecasting is a multi-part process that involves:

- Contract planning and forecasting
- New contract initiation
- New contract solicitation
- New contract evaluation
- New contract award
- Contract administration

*Contract planning and forecasting* procedures are critical to the acquisition process. Timely, reliable, and accurate forecasting and planning ensures the successful and legal acquisition of CDC's services, supplies, materials, equipment, etc. and allows for CDC and PGO to more efficiently manage its resources.

*New contract initiation* begins with the development of a completed request for contract (RFC) package. Program Offices have the primary responsibility for developing the RFC package with PGO providing guidance and assistance as needed.

*New contract solicitation* begins when PGO accepts the RFC package as complete. The package is assigned to a PGO contract specialist responsible for preparation of the actual solicitation. Solicitations

are developed and issued in accordance with Federal Acquisition Regulations (FAR) parts 12, 13, 14, and 15, along with corresponding parts of the Health and Human Services Acquisition Regulations (HHSAR) and PGO standard operating procedures.

*New contract evaluation* begins with the receipt of offeror's proposals to the solicitation. Review of both the technical and business proposals are done to identify the proposal(s) offering the best quality product or service at a fair and reasonable price/cost. The program officer, as the technical expert, reviews and evaluates the technical proposals. Finally, with PGO's guidance and assistance, business proposals are reviewed, and negotiations are held, if necessary, and a vendor is selected.

*New contract award* is the final phase of the pre-award stage of the acquisition process and begins the *contract administration* phase that continues for the duration of the agreement as work is conducted in accordance with the statement of work. Contract administration is conducted in accordance with FAR part 42, part 342.1 of the HHSAR, and PGO standards

PGO uses HealthImpact.net for acquisitions planning (<http://healthimpactnet.cdc.gov/>). HealthImpact.net is designed to be a "full life-cycle" agency-wide budget planning and execution tool.

Key strategy information maintained within HealthImpact.net includes data that aligns CDC investments and projects to goals and objectives, and allocates them across basic CDC areas of work that include:

- Intervention and technical assistance
- Research and surveillance
- Education, training, and exercise
- Information technology and informatics

HealthImpact.net also facilitates basic project management with the ability to capture information on milestones, activities, risks and risk mitigation plans. Organizations should begin inputting information into HealthImpact.net for their next fiscal year plans around the April/May timeframe of the prior year. The types of acquisition procurement vehicles available include:

- Micro Purchases are less than \$3,000, usually items such as office supplies, furniture, etc. The preferred means of purchase and payment of micro purchases is a SmartPay VISA Purchase Card. Information about Micro Purchases and SmartPay VISA Purchase Card can be found at <http://pgo.cdc.gov/pgo/GeneralContent.do?chronicleid=0900f3ee8000223d>
- Simplified Acquisition are purchases between \$3,001 - \$100,000 and often involve the purchases of items such as supplies, services, etc. Simplified acquisitions require a purchase order.
- Contract actions are created for purchases greater than \$100,000 and cannot be ordered from an existing GSA or CDC contract. Large contract action may include the purchase of items such as services, buildings, research, supplies, etc.
- Blanket Purchase agreements are agreements with vendors in advance to buy certain things at certain prices. This makes it easy for CDC to then place orders against those agreements.

The contracting process may take up to 6-8 months. As a result, planning, especially for contracts, must begin well in advance of the need for products or services. From the start of the procurement process to the time of a contract and statement of work are received, timeframes are defined as follows:

- Full and open competition, 6-8 months
- Limited competition, 4-6 months
- Sole source actions, 3-4 months
- Task orders and modifications, 1-3 months
- Simplified acquisition, often less than 1 month

### **Upcoming Project Management Community of Practice Meetings and Topics**

- **Thursday, July 24**  
Scrum in the Research Environment
- **Friday, August 22**  
General Management vs. Project Management
- **Friday, September 26**  
Records Management, PIA, and Classified Information
- **Friday, October 24**  
Facilitation – A Key to Project Success
- **Friday, December 5**  
Influence – A Critical Skill for Successful Project Managers

Portions of the content of this newsletter were paraphrased from a presentation by Jamie Legier during the June 2008 meeting of the CDC Project Management Community of Practice (PMCoP), the PGO website, and HealthImpact.net. For more information regarding the Procurement and Grants Office and/or related processes please visit the PGO website at <http://pgo.cdc.gov/>. For more information on the CDC PMCoP, or the CDC Unified Process (UP) please visit the CDC UP website located at <http://www.cdc.gov/cdcup/>. ■

### **CDC Unified Process Working on HHS EPLC**

The CDC Unified Process Team, in collaboration with the Department of Health and Human Services (HHS), has been aggressively working on the Enterprise Performance Life Cycle (EPLC). The CDC UP Design Group has been an integral part of this effort. This month is focused on delivering CDC feedback to HHS on the following EPLC artifact sets:

- Stage Gate Reviews
- Annual Operational Assessment
- Security Approach
- Privacy Impact Assessment
- Project Categorization
- Acquisition Plan
- Independent Verification & Validation
- Staff Development Plan
- Records Management
- Project Process Agreement
- Risk Management Plan
- Communication Plan
- Quality Assurance Plan

If you would like to participate as part of the CDC UP Design Group please contact the CDC UP Team at [cdcup@cdc.gov](mailto:cdcup@cdc.gov). ■

### **Contact the CDC Unified Process Team**

The *CDC Unified Process Project Management Newsletter* is authored by Daniel Vitek MBA, PMP and published by the National Center for Public Health Informatics.

For questions about the CDC UP, comments regarding this newsletter, suggestions for future newsletter topics, or to subscribe to the CDC UP Project Management Newsletter please contact the CDC UP Team at [cdcup@cdc.gov](mailto:cdcup@cdc.gov)

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