

GSA ORDER

Subject: General Services Administration Acquisition Manual; GSAM Case 2013-G505; Small Business Editorial and GSA Form 2689.

1. **Purpose.** This order transmits a revision to the General Services Administration Acquisition Manual (GSAM).
2. **Background.** The General Services Administration amends the GSAM to revise the language of the following GSAM subparts:
 - 519.001 (Definitions)
 - 519.2 (Policies)
 - 519.3 (Determination of Small Business Status for Small Business Programs)
 - 519.4 (Cooperation with the Small Business Administration)
 - 519.5 (Set-Asides for Small Business)
 - 519.6 (Certificates of Competency and Determinations of Responsibility)
 - 519.7 (The Small Business Subcontracting Program)
 - 519.8 (Direct 8(a) Contracting)
 - GSAM Form 2689 (Small Business Analysis Record)
3. **Effective date.** July 23, 2014.
4. **Explanation of changes.** The GSAM subparts 519.001, 519.2, 519.3, 519.5, 519.7, 519.8 and GSAM Form 2689 are amended as follows:

GSAM Subpart 519.001 (Definitions)

- 519.001 – revises the definitions of the Office of Small Business Utilization staff means the staff with the responsibility for supporting small business activities and clarifies that the staff is a separate office.

GSAM Subpart 519.2 (Policies)

- 519.202-1(a) – clarifies that coordination is defined as meaning to obtain signatures of the appropriate parties and replaces the use of an actual dollar amount with a cross reference to the location in the FAR where the threshold is listed.
- 519.202-1(b)(1) – substitutes the small business specialist with the acronym of SBTA or SBS, and substitutes the Associate Administrator for Office of Small Business Utilization with the acronym of AAOSBU.

- 519.202-1(b)(2) – revised to read: “(2) When bundling is contemplated (see FAR 7.107), coordination with the SBTA and the AAOSBU is required. (i) Use the GSA form 2689 to obtain signature of the Small Business Administration (SBA) Procurement Center Representative (PCR) and the SBTA. The SBTA will coordinate with the AAOSBU. (see FAR 19.202-1(e)).”
- 519.202-1(b)(2)(ii) – clarifies that the acquisition planner uses the GSA form 2689, and substitutes the Associate Administrator for Office of Small Business Utilization with the acronym of AAOSBU.
- 519.202-1(c) – adds consolidated acquisitions, identifying when review and approval is required.
- 519.202-2(a) – clarifies that the contracting officer confers with the SBTA, replaces “you” with “he or she”, clarifies that HUBZone is to mean Historically Underutilized Business Zone, and replaces the spelling of SBA’s Procurement Center Representative with the acronym of PCR.
- 519.202-2(b) – deletes the reference to CCR and updates the web link to the Dynamic Small Business Search.

GSAM Subpart 519.3 (Determination of Small Business Status for Small Business Programs)

- 519.302 – revised to incorporate contracting activities must refer the matter to the Inspector General and Suspension and Debarment Official.
- 519.302(a) – deleted in its entirety.
- 519.302(b) – deleted in its entirety.
- 519.305 – revised to include contracting activities must refer the matter to the Inspector General and Suspension and Debarment Official.
- 519.305(a) – deleted in its entirety.
- 519.305(b) – deleted in its entirety.
- 519.306 – revised to incorporate contracting activities must refer the matter to the Inspector General and Suspension and Debarment Official.
- 519.306(a) – deleted in its entirety.
- 519.306(b) – deleted in its entirety.
- 519.307 – revised to incorporate contracting activities must refer the matter to the Inspector General and Suspension and Debarment Official.
- 519.307(a) – deleted in its entirety.
- 519.307(b) – deleted in its entirety.
- 519.308 – adds the new section – Protesting a firms status as an Economically Disadvantaged Women-Owned Small Business (EDWOSB) concern or Women-Owned Small Business (WOSB) concern eligible under the WOSB Program - that requires misrepresentation of a concern to be referred to the Inspector General and Suspension and Debarment Official.

GSAM Subpart 519.4 (Cooperation with the Small Business Administration)

- 519.4 – replaces Associate Administrator for Office of Small Business Utilization with the acronym of AAOSBU.

GSAM Subpart 519.5 (Set-Asides for Small Business)

- 519.502-1(a) – replaces “you” with “the contracting officer”, and inserts closed parenthesis after the reference to FAR 19.13.
- 519.502-1(b) – replaces “you” with “the contracting officer” and “he or she”, clarifies use of procedures to include modifying a set-aside, removes restriction of repetitive set-asides, revises last sentence to “When market research reveals that any supplies or services from mandatory sources, such as Federal Prison Industries, Inc. and Ability One, that were not available at the time of the original requirement have become available, a contracting officer may discontinue setting aside a continuing requirement (see FAR 8.002 and 8.003). The contracting officer shall document the determination to discontinue setting aside a continuing requirement (see 519.502-70).”
- 519.502-70(a) – inserts new section to provide guidance on the use of the GSA Form 2689.
- 519.502-70(c) – clarifies the use of GSA Form 2689 for acquisitions with mandatory sources.
- 519.502-70(d) – inserts new section to provide guidance on acquisitions below the simplified acquisition threshold.
- 519.502-70(f) – clarifies when use of the GSA Form 2689 is required for acquisitions over the SAT.
- 519.502-70(g) – clarifies the use of the GSA Form 2689 for orders against Multiple Award Schedules and Indefinite Delivery/Indefinite Quality contracts.
- 519.502-70(j) – revised chart for GSA Form 2689 Requirement Conditions:
 - Item (1) – Under the Simplified Acquisition Threshold (SAT), GSAM 519.502-70(d), adds the sentence, “The GSA Form 2689 does not require SBTA or SBA PCR review or signature for these acquisitions”.
 - Item (3) – Order/BPA against Multiple Award Schedules, see exception under 8 and 9.
 - Item (4) – Order against Indefinite-Delivery Contract, see exception under 8 and 9.
- 519.502-70(k)(1) – replaces the review threshold of \$500M with \$50M, replaces “you” with “the contracting officer”, replaces “contract” with “solicitation”, and adds “(see FAR 38.1) or an Indefinite-Delivery solicitation (see FAR 16.5)” to reference the appropriate FAR citation.
- 519.502-70(k)(2) – replaces the review threshold of \$500M with \$50M, and replaces “you” with “the contracting officer”.
- 519.502-70(k)(2) – removes the sentence “The AAOSBU and SBTA each have 5 workdays to review the decision.”
- 519.502-70(k)(2)(iii) – adds “The acquisition meets the definition of a Bundled Contract FAR 7.107 and FAR 2.101.”
- 519.502-70(l) – replaces “you” and “your” with “the contracting officer”.
- 519.502-70(m) – replaces the “Contracting Director” with “HCA, as delegated,” and replaces “you” with “the contracting officer”.

- 519.503(b) – replaces “you” with “the contracting officer”.
- 519.506 – replaces “you” with “the contracting officer”.

GSAM Subpart 519.6 (Certificates of Competency and Determinations of Responsibility)

- 519.602-3(a) – clarifies that “the contracting officer” shall forward information, and replaces “you” with “the contracting officer”.
- 519-602-3(a)(2) – clarifies that “the contracting officer” shall include a justification with the appeal.
- 519.602-3(b) – replaces “applicable contracting activity” and “concerned activity” with “contracting officer”, and removes the last sentence.

GSAM Subpart 519.7 (The Small Business Subcontracting Program)

- 519.700-70 – replaces “you” with “the contracting officer”.
- 519.702 – removes the entire statutory requirements section and marks section RESERVED.
- 519-705-2(a) – replaces “you” with “the contracting officer”.
- 519-705-2(b) – replaces “you” with “the contracting officer”.
- 519-705-2(c) – replaces “you” with “the contracting officer”, and replaces “you” with “he or she”.
- 519-705-2(d) – replaces “you” with “the contracting officer”.
- 519.705-2(d)(1) – replaces “you” with “the contracting officer”, replaces Small Business Technical Advisor with the acronym of SBTA, and deletes the language referencing the procedure for regions since it is covered by the SBTA.
- 519.705-2(d)(2) – adds to include justification requirements to document the rationale behind a determination of no subcontracting opportunities, and clarifies that the contracting officer may use the justification provided by the apparent successful offeror.
- 519.705-3(a) – replaces the review threshold of \$500M with \$50M.
- 519.705-3(a)(1) – clarifies that the contracting officer shall provide reasonable time for review and ensure evaluation criteria, replaces the Office of Small Business Utilization with the acronym of OSBU, a reasonable period of time is identified as approximately 10 days.
- 519.705-3(a)(2) – replaces “you” with “the contracting officer”, and replaces “your” with “his or her”.
- 519.705-3(c) – replaces “you” with “the contracting officer”.
- 519.705-3(d) – replaces “you” with “the contracting officer”.
- 519.705-4(a) – revisions are made for consistency with Appending 519A.
- 519.705-4(b)(1) – adds “the contracting officer should”.
- 519.705-4(b)(2) – adds “the contracting officer shall”.
- 519.705-4(c) – replaced with “The contracting officer shall use the Subcontracting Plan Evaluation Checklist at Appendix 519B and GSAM 519.7 to evaluate an offeror’s subcontracting plan.”
- 519.705-4 – adds a heading for Negotiating Goals and Other Aspects of Plans in between paragraphs (e) and (f).

- 519.705-4 (f) – clarifies that the contracting officer shall ensure the offeror has included all subcontracts.
- 519.705-4 (g) – clarifies that the contracting officer shall develop a strategy, clarifies that the contracting officer should suggest organizations the offeror may contact, replaces “you” with “he or she”.
- 519.705-4 (g)(1) – replaces Central Contractor Registration with System for Award Management (SAM) www.sam.gov database to conduct market research and confirm the eligibility for SBA’s procurement preference programs.
- 519.705-4 (g)(2) – removes reference to requesting access to the MBDA’s Profile System.
- 519.705-4 (g)(3) – replaces “Regional small business staffs” with “SBUCs”, and replaces the Office of Small Business Utilization with the acronym of OSBU.
- 519.705-4 (g)(8) – adds “The Department of Veterans Affairs for assistance in identifying Service Disabled Veteran-Owned Small Businesses (SDVOSBs) and Veteran-Owned Small Businesses (VOSBs) at”.
- 519.705-4 (g)(9) – adds “Dynamic Small Business Search (DSBS) at <http://dsbs.sba.gov>”.
- 519.705-4(i) – clarifies that the contracting officer shall obtain copies.
- 519.705-4(j) – adds the Electronic Subcontracting Reporting System which was previously only abbreviated.
- 519.705-5(a) – inserts a new section to provide guidance on awards involving subcontracting plans requiring SBTA and SBA PCR review
 - (1)(i) – clarifies the requirement to provide an electronic copy of the plan.
 - (1)(ii) – adds “Document the final decision in the contract file”.
 - (1)(iii) – adds “If the contracting officer does not receive review comments from the SBTA within 5 workdays, the contracting officer shall document the file and continue with the award process (see FAR 19.705-5(a)(3)).”
- 519.705-5(b) – inserts a new section to provide guidance on awards involving subcontracting plans requiring AAOSBU review.
 - (1)(i) – replaces the review threshold of \$500M with \$50M.
 - (3) – adds “The contracting officer shall consider any recommendations the SBTA, SBA PCR, or AAOSBU provides about whether to accept or reject a subcontracting plan. Document the final decision in the contract file.”
 - (4) – adds “If the contracting officer does not receive review comments from the SBTA (inclusive of AAOSBU review) within 10 workdays, the contracting officer shall document the file and continue with the award process (see FAR 19.705-5(a)(3)).”
- 519.705-5(c) – inserts a new section to provide guidance on notification letters for individual subcontracting plans.
 - (1) – clarifies that the contracting officer shall approve the subcontracting plan as part of the award.
 - (2) – clarifies to send the letter electronically with the award package or as soon as practicable after award.

- [Format A] – include the Small Business Technical Advisor (SBTA), and GSA’s Subcontracting Plan Program Manager in the email distribution when submitting the ISR and SSR via eSRS.
- 519.705-5(d) – adds “the contracting officer shall approve the commercial plan as part of the award”, and “using FORMAT B below, electronically”.
- 519.705-6 – inserts the requirement to provide a copy of the notice of award and the successful offeror’s subcontracting plan to the SBA Area Director.
- 519.705-6 – replaces the Office of Small Business Utilization with the acronym of OSBU.
- 519.705-7(a) – clarifies that the contracting officer shall provide information, and replaces “your” with “his or her”.
- 519.705-7(b) – clarifies that the contracting officer shall consider all pertinent information, and replaces “your” with “the contracting officer”.
- 519.705-7(d) – clarifies that the contracting office shall submit the final decision, and replaces “your” with “his or her”.
- 519.706(c) – clarifies that the contracting officer shall review reports, and requires the contractor to explain the shortfall.
- 519.706(d) – clarifies that the contracting officer shall contact the contractor review the final ISR, and issues a second notice as applicable.
- 519.706(d)(3) – replaces “should” with “shall”.

GSAM Subpart 519.8 (Direct 8(a) Contracting)

- 519.803-70(a) – replaces “you” with “the contracting officer”, and replaces the Associate Administrator for the Office of Small Business Utilization with the acronym of AAOSBU.
- 519.803-70(b) – replaces “you” with “the contracting officer”, and replaces the “Office of Small Business Utilization” with “SBTA”.
- 519.803-70(c) – replaces “you” with “the contracting officer”, and replaces “JWOD” with “AbilityOne”.
- 519.803-71 – replaces “you” with “the contracting officer”, and replaces the Associate Administrator for the Office of Small Business Utilization with the acronym of AAOSBU.
- 519.870-1(a) – removed in its entirety and replaced with “In accordance with FAR 19.800(f), GSA obtained a delegation from SBA permitting direct 8(a) contracting as documented through GSA’s Partnership Agreement. The current Partnership Agreement is location on the GSA internal website at <https://insite.gsa.gov/portal/category/529822>. The Partnership Agreement includes the current terms and conditions.”
- 519.870-1(b) – removed in its entirety and replaced with “This authority applies to all 8(a) acquisition conducted by GSA. It does not apply to the multiple award schedule program.”

GSAM Form 2689 (Small Business Analysis Record)

Total replacement of form that includes:

- Block 10b, 12c and 13c, Date of concurrence of Contracting Officer, Supervisory Official, Small Business Specialist/Small Business Technical Advisor and SBA's Procurement Center Representative provide box for date of concurrence; placed in the beginning of the Form as opposed to the end.
- Block 10b, 11b, 12b and 13b, Signature blocks are expandable to match amount of text input and restructure of boxes to allow for more spaces for a digital signature.
- Block 18a, adds limited source acquisition and reference to FAR 8.4 and FAR 16.5.
- Block 20, First Consideration block added which includes 8(a), HUBZone, SDVOSB, WOSB, and EDWOSB; identifies that policy is to use existing GSA acquisition vehicles before establishing new contracts.
- Block 21, Second Consideration block added which includes Total or Partial Small Business Set-Aside; identifies that policy is to use existing GSA acquisition vehicles before establishing new contracts.
- Block 22, Third Consideration block added.
- Block 23, Source Selection Factors, adds Socio-Economic Status.
- Block 24, Market Research removes attach Justification and Approval if sole source was selected for 8(a) sole source under the threshold identified in FAR 19.808-1(a).
- Block 27a, Checked Green Products Compilation (FAR 23.103) removed in entirety.
- Block 27b, Considered Green Product Purchasing (FAR 23.103) removed in entirety.



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