

AF UP Lessons Learned - All

Lesson #	Lesson Title	Installation	Impact	Status
AFCESA00001	Pre-Proposal Conference Preparation	TRD	AF Wide	Approved
AFCESA00002	Technical Library Preparation	TRD	AF Wide	Approved
AFCESA00003	Government Cost Estimate Development/Review	Dobbins	AF Wide	Approved
AFCESA00004	Abandonment as an Alternative	Bolling	AF Wide	Approved
AFCESA00005	Ownership of Utilities - Preliminary UP Screening Process	Bolling	AF Wide	Approved
AFCESA00006	Source Selection Evaluation Team (SSET) Training	Schriever	AF Wide	Approved
AFCESA00007	RFP Improvement for Small Installations	W.K. Kellogg	AF-RFP Template	Disapproved
AFCESA00008	IDS Electronic Source Selection Tool	TRD	AF Wide	Approved
AFCESA00009	RFP Clarification - Overhead to Underground Electric	TRD	AF-RFP Template	Approved
AFCESA00010	GCE Approval Process	TRD	AFCESA Only	Approved
AFCESA00011	Points of Demarcation (PoD)	TRD	AF-RFP Template	Approved
AFCESA00012	Including UP with MILCON Projects	Schriever	AF Wide	Approved
AFCESA00013	AFCESA PMs as Technical Evaluators	Selfridge	AFCESA Only	Disapproved
AFCESA00014	Minimizing Pictures/Graphics in Proposals	All	AF Wide	Approved
AFCESA00015	Loading Schedule B-2 into SPS	Patrick	AF Wide	Approved
AFCESA00016	Requirement to Submit UP Funding for Award	Bolling	AF-P&G	Approved
AFCESA00017	GCE Development	TRD	AF Wide	Approved
AFCESA00018	RFP Exceptions	TRD	AF-RFP Template	Approved
AFCESA00019	Price Proposal Clarification	TRD	AF-RFP Template	Approved
AFCESA00020	Initial Capital Upgrade Estimate Conflict	All	AF-RFP Template	Approved
AFCESA00021	Requirement to not pay until improvement is "put into useful service"	All	AF Wide	Under Review
AFCESA00022	Alternate Proposals	All	AF-RFP Template	Approved

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Lesson #	Lesson Title	Installation	Impact	Status
AFCESA00023	Handling initial Capital Upgrades in the GCE	All	AF-RFP Template	Approved
AFCESA00024	Reimbursement for utilities	All	AF Wide	Disapproved
AFCESA00025	Digging Permits	All	AF Wide	Disapproved
AFCESA00026	Recommend Change to RFP Template - Military Training	All	AF-RFP Template	Approved
AFCESA00027	Inclusion of All Funding Sources	All	AF Wide	Approved
AFCESA00028	Extended Time for Source Selection Team Reviews	Bolling	AF Wide	Approved
AFCESA00029	Keeping Base Civil Engineer Involved in Certified Economic Model	TRD	AF Wide	Approved
AFCESA00030	Keep Financial Management (FM) community informed throughout Utilities Privatization (UP) process	TRD	AF Wide	Approved
AFCESA00031	Due Dilligence Visits	TRD	MAJCOM Only	Approved
AFCESA00032	Sufficient Base Access for the Offerors	TRD	AF Wide	Approved
AFCESA00035	RFP Complexity (similar to ANG LL #4)	TRD	AF Wide	Disapproved
AFCESA00036	RFP Template Errata Sheet Information	TRD	AF Wide	Approved
AFCESA00037	Planning SourceSelection (SS) Team Member Evaluation Schedules	TRD	AF Wide	Approved
AFCESA00038	Include Level of Detail in the Program Plan/Schedule	TRD	AF-RFP Template	Disapproved
AFCESA00039	Plan Funding for Unknowns	TRD	AF Wide	Disapproved
AFCESA00040	Use of Source Selection Tools	TRD	AF Wide	Approved
AFCESA00041	Offer Acceptance Period	All	AF Wide	Approved
AFCESA00042	Value Engineering Principles In Negotiating Utility Replacements	Eglin	Base Only	Disapproved
AFCESA00043	Statement of Qualifications (SOQs)	TRD	AF-RFP Template	Under Review
AFCESA00044	Due Diligence Team Members	TRD	Base Only	Approved
AFCESA00045	Approval Process for Transferring Property Using the GSA Area-wide	Eglin	AF Wide	Approved
AFCESA00046	RFP Solicitation Closing Date Extensions	TRD	Unknown	Approved
AFCESA00047	Tracking Offerors' Bid Expiration Date	Eglin	Base Only	Approved

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Lesson #	Lesson Title	Installation	Impact	Status
AFCESA00048	Additional Site Visits to the Base	TRD	AFCESA Only	Approved
AFCESA00049	Due Diligence Questions	TRD	Base Only	Approved
AFCESA00050	TRD RFP Pricing Schedule Instructions	TRD	Unknown	Approved
AFCESA00051	Program Milestone Review	TRD	Base Only	Approved
AFCESA00052	Contact of Nonpathfinder POCs	All	AF Wide	Approved
AFCESA00053	Econ Analysis Review Process for UP	TRD	AF-P&G	Under Review
AFCESA00054	Electrical Transformers in Buildings as Deficiencies	TRD	Base Only	Approved
AFCESA00055	Differing Site Conditions Clause	TRD	AF-RFP Template	Approved
AFCESA00056	Protection and Preservation of Historic Resources/Sites/Buildings	TRD	Unknown	Approved
AFCESA00057	Contractors as Source Selection Advisors for AF UP	TRD	AF Wide	Approved
AFCESA00058	UP Phase III Deliverables	TRD	AF-RFP Template	Under Review
AFCESA00059	Offerors Not Allowed To Include Recovery of Interest In Proposals	TRD	AF-RFP Template	Under Review
AFCESA00060	UP Approval Process	TRD	AF-P&G	Under Review
AFCESA00061	Utility Specific JX Attachments	TRD	AF Wide	Approved
AFCESA00062	Listing of Potential Small Business Subcontracts	TRD	AF Wide	Disapproved
AFCESA00063	Source Selection: Transition Plan and Source Selection Plan	Dobbins	AF Wide	Approved
AFCESA00064	Move Some Approval Package Documents To Later in the Process	Dobbins	AF Wide	Approved
AFCESA00065	Prepare Project Summary Documents	Dobbins	AF Wide	Approved
AFCESA00066	More Time for SSET/SSA Decision Coordination	Dobbins	AF Wide	Under Review
AFCESA00067	Formats & Meter Data Reading	TRD	Base Only	Approved
AFCESA00068	AE Delivery of the Final Comprehensive Analysis Report (CAR)	Dobbins	AF Wide	Approved
AFCESA00069	AFCESA Utilities Privatization Website Lessons Learned Database	Tyndall	Base Only	Approved

AF UP Lessons Learned - All

Lesson #	Lesson Title	Installation	Impact	Status
AFCESA00070	Remove USAF UP Competitive RFP Template from the Restricted Site	TRD	AF-RFP Template	Approved
AFCESA00071	Primary Organization Responsible for UP Schedules between AFCESA & DESC	All	AFCESA Only	Under Review
AFCESA00072	RFP Scope and Purpose Clarification	TRD	AF-RFP Template	Approved
AFCESA00073	Supplies or Services and Prices/Costs- Program Goal	All	AF-RFP Template	Approved
AFCESA00074	Price Proposal- Sub-CLIN AB: Fixed Monthly Cost to Operate and Maintian the Utility System	All	AF-RFP Template	Approved
AFCESA00075	Government Option- Retain Control of Wastewater Treatment	All	AF-RFP Template	Approved
AFCESA00076	Utility System Ownership, Employees, and Security- National Agency Check	All	AF-RFP Template	Approved
AFCESA00077	Clarification of Quality Management Plan Location in the RFP	All	AF-RFP Template	Approved
AFCESA00078	Service Charge Adjustment	All	AF-RFP Template	Approved
AFCESA00079	Special Contract Provisions- Catastrophic Loss	All	AF-RFP Template	Approved
AFCESA00080	Contract Clauses- FAR Clauses	All	AF-RFP Template	Approved
AFCESA00081	Contract Clauses- FAR Clauses	All	AF-RFP Template	Approved
AFCESA00082	AFFARS Clauses Incorporated by Reference	All	AF-RFP Template	Approved
AFCESA00083	Regulated Utility Clauses Incorporated by Reference	All	AF-RFP Template	Approved
AFCESA00084	Statement of Qualifications Submission	All	AF-RFP Template	Approved
AFCESA00085	Proposal Preparation Instructions Vol. I: Tech: Subfactor 2: Quality Management Plan	All	AF-RFP Template	Approved
AFCESA00086	Proposal Preparation Instructions- Vol.IV: Price; Organization	All	AF-RFP Template	Approved
AFCESA00087	Proposal Preparation Instructions- Vol. IV: Price; Instrucions	All	AF-RFP Template	Approved
AFCESA00088	Proposal Preparation Instructions- Vol. IV: Price Proposal Section 2	All	AF-RFP Template	Approved

AF UP Lessons Learned - All

Lesson #	Lesson Title	Installation	Impact	Status
AFCESA00089	Proposal Preparation Instructions-	All	AF-RFP Template	Approved
AFCESA00090	Proposal Preparation Instructions - Vol. IV; Renewals & Replacements	All	AF-RFP Template	Approved
AFCESA00091	Proposal Preparation Instructions - Vol. IV: Price;	All	AF-RFP Template	Approved
AFCESA00092	Proposal Preparation Instructions- Vol. IV- Price	All	AF-RFP Template	Approved
AFCESA00093	Evaluation Factors and Subfactors- Order of Importance	All	AF-RFP Template	Approved
AFCESA00094	List of Attachments	All	AF-RFP Template	Approved
AFCESA00095	List of Attachments - Right-of-Way, Exhibit B, Electric	All	AF-RFP Template	Approved
AFCESA00096	List of Attachments- Right-of-Way; Exhibit B, Natural Gas	All	AF-RFP Template	Approved
AFCESA00097	List of Attachments- Right-of-Way, Water Distribution System	All	AF-RFP Template	Approved
AFCESA00098	List of Attachments- Right-of-Way, Wastewater Dist. Sys	All	AF-RFP Template	Approved
AFCESA00099	Description of J41 Attachments-	All	AF-RFP Template	Approved
AFCESA00100	Wastewater Point of Demarcation Clarification- J41 Attachments	All	AF-RFP Template	Approved
AFCESA00101	Water-oil separators Point of Demarcation Clarification- J41 Attachments	All	AF-RFP Template	Approved
AFCESA00102	Regulated & Non-Regulated utility Clauses Incorporated	All	AF-RFP Template	Approved
AFCESA00103	Proposal Preparation Instructions	All	AF-RFP Template	Approved
AFCESA00104	Clarification to J41 Attachment, Exhibit B	All	AF-RFP Template	Approved
AFCESA00105	Clarification on J41 Demarcation - List of Attachments	All	AF-RFP Template	Approved
AFCESA00106	Direct MAJCOM Support	TRD	AF Wide	Disapproved
AFCESA00107	Schedule B-1 Utility Service Payment by the Government	TRD	AF-RFP Template	Approved
AFCESA00108	UP Project Summary Report	TRD	AF Wide	Disapproved

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Lesson #	Lesson Title	Installation	Impact	Status
AFCESA00109	Proposers Sign Right-Of-Way Document	Dobbins	AF-RFP Template	Approved
AFCESA00110	Phase III GCE Quality Control Check #1	Jacksonville	Unknown	Approved
AFCESA00111	Phase III Life Cycle Benefits Template	TRD	Unknown	Approved
AFCESA00112	Sending Approval Package to AF/ILEXO	TRD	Unknown	Approved
AFCESA00113	Utility System and Areal Descriptions	TRD	Unknown	Approved
AFCESA00114	Schedule B-2 Transition Clin	Maxwell/Gunter	AF Wide	Under Review
AFCESA00115	Congressional Notification Package	Dobbins	AF-P&G	Under Review
AFCESA00116	Incorporate 9/99 & 12/00 AF P&G Manual Clarifications	All	AF-P&G	Under Review
AFCESA00117	Due Diligence Visits should be Limited to Plant Visits	Maxwell/Gunter	AF-RFP Template	Disapproved
AFCESA00118	Industry Forum Announcements	Maxwell/Gunter	Unknown	Approved
AFCESA00119	Oral Presentations as a part of the initial proposals	Maxwell/Gunter	Unknown	Approved
AFCESA00120	Environmental Baseline Survey Update	All	AF-P&G	Under Review
ANG00001	Data Collection and Documentation	All ANG	AF Wide	Approved
ANG00002	Helping Bases Become More "Pro" Privatization	All ANG	AF Wide	Approved
ANG00003	Site Utility Maps	All	MAJCOM Only	Approved
ANG00004	RFP Complexity	All ANG	MAJCOM Only	Approved
ANG00005	Government Cost Model	All ANG	MAJCOM Only	Approved
ANG00006	Pricing Database	All ANG	MAJCOM Only	Disapproved
ANG00007	ANG Lease Considerations	All ANG	MAJCOM Only	Approved
ANG00008	Direct Negotiation with Current Owners/Providers	All ANG	MAJCOM Only	Approved
ANG00009	Base Assistance	All ANG	MAJCOM Only	Approved
ANG00010	Data Collection During Inventories	All ANG	AF Wide	Disapproved

AF UP Lessons Learned - All

Lesson #	Lesson Title	Installation	Impact	Status
ANG00011	Funding of Privatized Systems	All	MAJCOM Only	Disapproved

AF UP Lessons Learned - # AFCESA00001

Title: Pre-Proposal Conference Preparation

Designator: Pathfinder

Impact AF Wide

Submitted AFCESA

Base TRD

Category Technical

Lesson Approved

Sub-Category PH3-Pre-Proposal

Issue/Concern:

Planning for the Pre-Proposal Conference.

Recommendation:

Based on the Pre-Proposal Conferences held at TRD, Maxwell/Gunter, and Ellington Field, the following are some suggestions on logistics and rules of engagement:

- 1) Set-up a process to answer questions (CO send out questions to the project team, have legal review questions/answers, provide draft responses to all parties, set-up telecon to discuss and finalize answers, CO issue amendment if required).
- 2) You don't have to answer all questions (refer questions to specific paragraph and don't paraphrase from RFP, refer to previous amendment if you get the same questions again)
- 3) Make sure the base has a conference room reserved and have the base experts available
- 4) Have base reserve transportation for the contractors
- 5) Review the RFP and know whats in it.
- 6) Do a dry run of the base tour ahead of time.
- 7) Set up a technical library early (spell out arrangements for viewing information, provide info on CD if possible, have copy machine available)
- 8) Start the meetings on time to avoid perception of favoritism.
- 9) Expect additional site visits.

For PM's - All this should be discussed and planned out during the Source Selection Authority Briefing (SSA) Trip. These items should be coordinated with the base UP POC, the CO, and the AFCESA PM.

Reference: For more detailed information on item #7, see Lesson # AFCESA00002

Systems Involved: Electric Natural Gas Water Wastewater Other

Originator L. Richardson

Date 25-aug-00

Organization HQ AFCESA/CEOC

DSN Phone: 523-6372

AFCESA Wolf

Commercial 281-538-9768

LLRC 30 Mar 01 - Approved by the LLRC.

AF UP Lessons Learned - # AFCESA00002

Title: Technical Library Preparation

Designator: Pathfinder

Impact AF Wide

Submitted AFCESA

Base TRD

Category Technical

Lesson Approved

Sub-Category PH3-Site Visit

Issue/Concern:

Information to be included in the Base Technical Library was unclear and should be standardized to the extent possible at each installation.

Recommendation:

The Technical Library should have at the least the following information available:

- 1) System maps
- 2) Work order/Job order reports
- 3) Base plans
 - a) Base Comprehensive/General Plan
 - b) Disaster/Contingency Response
 - c) HAZMAT/Spill plans
- 4) Outage reports/Facilities Priority List
- 5) Historical information
 - a) Billing statements
 - b) Special events
- 6) Digging permit process
- 7) Generator/Transformer list
- 8) Studies related to the utility systems (Except UP studies)
- 9) Environmental information
 - a) PCB reports/EIAP/EBS
- 10) List of recently completed projects
- 11) List of required capital upgrades for each system

Systems Involved: Electric Natural Gas Water Wastewater Other

Originator L. Richardson

Date 24-aug-00

Organization HQ AFCESA/CEOC

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AFCESA Wolf

Commercial 281-538-9768

LLRC 30 Mar 01 - Approved by the LLRC.

24 Aug 01 - Added items #10 and #11 to the list based on discussion held between AFCESA and ILEXO.

AF UP Lessons Learned - # AFCESA00003

Title: Government Cost Estimate Development/Review

Designator: Pathfinder

Impact: AF Wide

Submitted: AFCESA

Base: Dobbins

Category: General

Lesson: Approved

Sub-Category: PH3-GCE

Issue/Concern:

When conducting the technical review of the Pathfinder Government Cost Estimates (GCE's), a revised process between HQ AFCESA and the A-E was recommended that needs to be implemented during the Non-Pathfinder projects.

Recommendation:

The process should be as follows:

- 1) A-E develops interim submittals for Inventory (T4), New Facilities (T5), and the Unit Cost Database (UCD).
 - a) A-E submits interim version of T4, T5, and UCD to Government using the Certified Economic Analysis (CEA) Cost Model.
 - b) Government reviews T4, T5, and UCD, submits comments to A-E.
- 2) A-E develops and submits the draft GCE package.
 - a) A-E completes the Adjusted Status Quo O&M template and the GCE Supporting Data Template.
 - b) A-E produces the GCE by completing the T2a (General Inputs), T3 (status Quo O&M Input), T4, T5, and UCD in the CEA cost model.
 - c) A-E submits draft GCE (CEA model, Adjusted Status Quo O&M Template, and GCE Supporting Data Template) and responses to Government interim review comments.
- 3) Government GCE review and approval process.
 - a) Government reviews GCE package.
 - b) Government submission of consolidated comments to A-E.
 - c) A-E to incorporate comment and provide responses.
 - d) Teleconference to finalize GCE comments.
 - e) A-E finalizes GCE and prepares for presentation at base.

Systems Involved: Electric Natural Gas Water Wastewater Other

Originator: G. Onorato

Date: 15-feb-01

Organization: HQ AFCESA/CEOC

DSN Phone: 523-6374

AFCESA: Onorato

Commercial: 850-283-6374

LLRC

30 Mar 01 - LLRC reviewed and decided additional information was required. Mr Voight mentioned that a detailed gantt chart was available that could add more information.

30 May 01 - LLRC approved lesson with corrections.

AF UP Lessons Learned - # AFCESA00004

Title: Abandonment as an Alternative

Designator: Pathfinder

Impact AF Wide

Submitted AFCESA

Base Bolling

Category General

Lesson Approved

Sub-Category PH1-Project Plan

Issue/Concern:

Privatizing systems with little or no market value because of age and/or physical condition requires an alternate approach.

Recommendation:

For those systems that are ready for replacement and the current utility provider will install the new system, the existing system can be abandoned in place and removed from the base real property records. This is particularly useful for systems that are partially owned by the government and partially owned by the utility provider.

Systems Involved: Electric Natural Gas Water Wastewater Other

Originator F. Nehrings

Date 03-jan-01

Organization HQ AFCESA/CEOC

DSN Phone: 523-6525

AFCESA Nehrings

Commercial 850-283-6525

LLRC

30 May 01 - LLRC agreed that existing guidance and procedures needed to be researched and expanded for this lesson.

24 Aug 01 - LLRC decided this lesson needs to be re-written since the Bolling gas system has followed this process successfully.

20 Feb 02 - LLRC decided to approve this with minor word edits to the description and recommendation.

AF UP Lessons Learned - # AFCESA00005

Title: Ownership of Utilities - Preliminary UP Screening Process

Designator: Pathfinder

Impact AF Wide

Submitted AFCESA

Base Bolling

Category General

Lesson Approved

Sub-Category PH1-Project Plan

Issue/Concern:

Ownership of utilities is not thoroughly determined until later in the process.

Recommendation:

Early in the process establish with the real property records exactly who owns the utilities before proceeding. This situation has surfaced at installations to include Bolling, Cavalier, and many ANG bases.

Reference: See Lesson #ANG00001 for additional information and cross-referencing.

Systems Involved: Electric Natural Gas Water Wastewater Other

Originator F. Nehrings

Date 03-jan-01

Organization HQ AFCESA/CEOC

DSN Phone: 523-6525

AFCESA Nehrings

Commercial 850-283-6525

LLRC

30 Mar 01 - LLRC agreed this lesson needed to be further expanded and include the MAJCOM in the decision process.

30 May 01 - LLRC decided this lesson should be referenced to #ANG00001 and approved.

AF UP Lessons Learned - # AFCESA00006

Title: Source Selection Evaluation Team (SSET) Training

Designator: Pathfinder

Impact AF Wide

Submitted AFCESA

Base Schriever

Category Contracting

Lesson Approved

Sub-Category PH3-Evaluation

Issue/Concern:

Training the SSET members before evaluation begins. At Schriever, the timeline was so compressed that the evaluation team did not receive adequate training for conducting

Recommendation:

Need to ensure the CO effectively plans for and trains the SSET members well before proposals are received.

Systems Involved: Electric Natural Gas Water Wastewater Other

Originator J. Dupin

Date 25-sep-00

Organization 50 CONS/LGCA

DSN Phone: 560-4246

AFCESA Wahl

Commercial 719-567-3456

LLRC 30 Mar 01 - Approved by the LLRC.

AF UP Lessons Learned - # AFCESA00007

Title: RFP Improvement for Small Installations

Designator: Pathfinder

Impact AF-RFP Template

Submitted AFCESA

Base W.K. Kellogg

Category Contracting

Lesson Disapproved

Sub-Category PH3-RFP Issue

Issue/Concern:

The current RFP has been developed for larger installations where there is more profit potential for offereors to go after. The RFP demands numerous plans, that aren't necessarily on hand, that must be produced at substantial costs. These costs evidently make it unfeasible to make offers on minor ANG installations (or Air Reserve Stations) therefore we have received almost no offers on our minor ANG installations.

Recommendation:

Recommend that an RFP be developed that selects a source to submit a UP contract for the installation. The source selection would be based on Past Performance and Risk. Once a source is selected, it will submit a draft contract with associated costs. Negotiations are then held to finalize the contract and agree on a price. If the agreed on price doesn't meet DOD criteria, then UP actions will cease. Otherwise, a UP contract is let.

Reference: See Lesson #ANG00004 for additional information and cross-referencing.

Systems Involved: Electric Natural Gas Water Wastewater Other

Originator B. Lally

Date 10-jan-01

Organization HQ AFCESA/CEOC

DSN Phone: 523-6135

AFCESA Smeltzer

Commercial 850-283-6135

LLRC

30 Mar 01 - Mr. Baker said he would discuss this lesson with USAF/ILEXO for further clarification.

30 May 01 - LLRC decided this lesson should be cross-referenced with Lesson #ANG00004.

2/20/2002 - LLRC decided to HOLD for next review. Combine with RFP Complexity, ANG LL #4.

4/5/2002 - LLRC decided to disapprove this LL.

AF UP Lessons Learned - # AFCESA00008

Title: IDS Electronic Source Selection Tool

Designator: Pathfinder

Impact AF Wide

Submitted AFCESA

Base TRD

Category Contracting

Lesson Approved

Sub-Category PH3-Evaluation

Issue/Concern:

The TRD source selection team is one of the first to use this tool at remote locations. The team was given a two-day hands on training of the tool from IDS at the beginning of the process and then returned to their offices at their organizations to start evaluating proposals. During the first couple of weeks there were numerous troubleshooting calls made and coordination efforts with the team chief to get things running smoothly.

Recommendation:

Since this is a new procedure to an acquisition that has no track record, suggest future teams stay a few days longer after the hands on training with IDS and review one proposal in full to include obtaining consensus before returning to their duty station. There may be exceptions to this where there are limited number of systems/proposals vs. regional efforts and bases with multiple systems.

- 1) Contracting Officers approve use of the SS Tool
- 2) Schedule and complete Training for all participants on the team including leadership
- 3) Obtain and have in place all computer access/authorizations/equipment prior to receipt of offerors proposals.

Systems Involved: Electric Natural Gas Water Wastewater Other

Originator L. Richardson

Date 20-feb-01

Organization HQ AFCESA/CEOC

DSN Phone: 523-6372

AFCESA Wolf

Commercial 281-538-9768

LLRC 30 Mar 01 - Approved by the LLRC.

AF UP Lessons Learned - # AFCESA00009

Title: RFP Clarification - Overhead to Underground Electric

Designator: Pathfinder

Impact AF-RFP Template

Submitted AFCESA

Base TRD

Category Technical

Lesson Approved

Sub-Category PH2-DRFP

Issue/Concern:

RFP language (specifically Attach J1 Electric Utility) needs clarification as to when/how the request for overhead to underground electric service will be handled. There was also some confusion as to how its related to the GCE.

Recommendation:

Clarify the language in paragraph titled "Specific Service Requirements" and refer back to paragraph C 11.2 (Capital Upgrades and Renewals and Replacements Plan) of the RFP. This is mainly an issue for AETC bases. This could have an impact on the GCE if not worded correctly in the RFP. The GCE should reflect the current inventory and include a one-for-one replacement cost for R&R.

Recommended wording for the RFP (Electrical J Attachments):

The contractor shall provide a proposal alternative as part of their capital upgrade and improvement plan to replace existing electrical overhead system equipment with new underground service unless to do so would cause the Contractor to violate any applicable law or regulation or would be inconsistent with sound utility operational practices.

For each project identified in paragraph C 11.2, the contractor shall provide the project scope and a lump sum cost estimate to provide underground electrical distribution with cost differences for each option, if any, clearly identified. The estimated project costs shall include the direct cost for labor, materials, equipment, supplies, and purchased services which may be burdened by applying standard administration, engineering, and supervisory overhead rate(s) and margins. It shall also include life cycle costs for operation and maintenance of the electrical distribution

Systems Involved: Electric Natural Gas Water Wastewater Other

Originator L. Richardson

Date 11-jan-01

Organization HQ AFCESA/CEOC

DSN Phone: 523-6372

AFCESA Wolf

Commercial 281-538-6372

LLRC

30 Mar 01 - LLRC agreed to table this lesson and Mr. Page was going to expand the language to provide further clarification.

30 May 01 - LLRC approved lesson with corrections.

AF UP Lessons Learned - # AFCESA00010

Title: GCE Approval Process

Designator: Pathfinder

Impact AFCESA Only

Submitted AFCESA

Base TRD

Category Technical

Lesson Approved

Sub-Category PH3-GCE

Issue/Concern:

The actual process to get the GCE initiated and achieve consensus from the base and Command needs to be clearly outlined.

Recommendation:

Suggested improvements to the process:

- 1) Send a letter to the base announcing this task and A-E visit.
- 2) Prepare agenda describing objectives and data requirements.
- 3) Make sure base has received Appendix J and has reviewed it before the meeting.
- 4) At initial visit, provide overview brief of the GCE and make sure the points of demarcation and the inventory in the RFP is accurate.
- 5) Outbrief the BCE after initial visit and provide a schedule of when the draft will be completed. Take minutes to document what items are still outstanding.
- 6) During the second visit, go over data for all systems to be privatized, outbrief the BCE and develop a schedule for delivering the final estimate to the CO.
- 7) Request A-E submit responses to comments on the draft before submitting the final estimate.

Systems Involved: Electric Natural Gas Water Wastewater Other

Originator L. Richardson

Date 11-jan-01

Organization HQ AFCESA/CEOC

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AFCESA Wolf

Commercial 281-538-9768

LLRC 30 Mar 01 - Approved by the LLRC.

AF UP Lessons Learned - # AFCESA00011

Title: Points of Demarcation (PoD)

Designator: Pathfinder

Impact AF-RFP Template

Submitted AFCESA

Base TRD

Category Technical

Lesson Approved

Sub-Category PH2-DRFP

Issue/Concern:

During the DCAR review process and development of the government estimate, it was discovered that many systems did not have a clearly defined PoD for their supporting activities.

Recommendation:

Review the latest PoDs published in Version 5 of the ROW and ensure they are clear, the graphics are accurate, the information from the errata sheet is incorporated and the base identify all unique PoD for the system and supporting utilities. Supporting utilities need to have their PoD's clearly defined (via description and/or illustration) for all systems that will be transferred.

Systems Involved: Electric Natural Gas Water Wastewater Other

Originator L. Richardson

Date 11-jan-01

Organization HQ AFCESA/CEOC

DSN Phone: 523-6372

AFCESA Wolf

Commercial 281-538-9768

LLRC 30 Mar 01 - Approved by the LLRC.

AF UP Lessons Learned - # AFCESA00012

Title: Including UP with MILCON Projects

Designator: Pathfinder

Impact AF Wide

Submitted AFCESA

Base Schriever

Category Contracting

Lesson Approved

Sub-Category PH3-Evaluation

Issue/Concern:

It was decided to include the privatization of the wastewater system at Schriever AFB as a contract line item (CLIN) option in a MILCON project to construct a new wastewater line to an off-base treatment plant. Bids received far exceeded the Government cost and was determined to be uneconomical by the Command. The project was awarded but the UP option was not exercised. Considerable problems were encountered when combining a services contract and a construction contract in terms of specifications, payments, and other issues.

Recommendation:

Do not include UP efforts as part of MILCON projects.

Systems Involved: Electric Natural Gas Water Wastewater Other

Originator J. Dupin

Date 25-sep-00

Organization 50 CONS/LGCA

DSN Phone: 560-4246

AFCESA Wahl

Commercial 719-567-3456

LLRC 30 Mar 01 - Mr. Baker will validate this lesson with USAF/ILEXO.

30 May 01 - LLRC approved with ILEX concurrence.

AF UP Lessons Learned - # AFCESA00013

Title: AFCESA PMs as Technical Evaluators

Designator: Pathfinder

Impact AFCESA Only

Submitted AFCESA

Base Selfridge

Category Contracting

Lesson Disapproved

Sub-Category PH3-Evaluation

Issue/Concern:

Assigning the AFCESA UP Project Manager as an evaluator on the technical evaluation team can result in the PM not being able to perform some of his/her duties. For example, I am restricted from reviewing and coordinating the economic analysis process because as an evaluator on the technical evaluation team, I am restricted, by the Contracting Officer, from having access to cost/price and economic data. I have been impeded many times from fully performing PM functions because of this restriction and, on a few occasions, had to ignore this restriction in order to advise and direct the A-E during the economic analysis process.

Recommendation:

Appoint AFCESA UP PMs as advisors to the technical evaluation teams. This way, they can still be proactive in guiding the team (which is very important) and also work closely with the A-E in the economic analysis process.

Systems Involved: Electric Natural Gas Water Wastewater Other

Originator B. Lally

Date 13-mar-01

Organization HQ AFCESA/CEOC

DSN Phone: 523-6135

AFCESA Smeltzer

Commercial 850-283-6135

LLRC 30 Mar 01 - LLRC decided to table this lesson until next meeting.

30 May 01 - LLRC decided to diapprove this lesson.

AF UP Lessons Learned - # AFCESA00014

Title: Minimizing Pictures/Graphics in Proposals

Designator: Non-Pathfinder

Impact AF Wide

Submitted AFCESA

Base All

Category Technical

Lesson Approved

Sub-Category PH3-RFP Issue

Issue/Concern:

Several of the electronic proposals received to date contained many pictures, making the proposals too large to open or download. One of these proposals locked up the computer when you tried to read it and couldn't be downloaded, because it was so large that it would time out before the downloading completed.

Recommendation:

In future RFPs, include in L.4, PROPOSAL PREPARATION INSTRUCTIONS-GENERAL, an instruction limiting pictures in the electronic proposal to the cover page only and limiting graphics to only those conveying data integral to the proposal.

Systems Involved: Electric Natural Gas Water Wastewater Other

Originator R. Wolf

Date 20-mar-01

Organization HQ AFCESA/CEOC

DSN Phone: 523-6187

AFCESA Wolf

Commercial 850-283-6187

LLRC 30 Mar 01 - Approved by the LLRC.

AF UP Lessons Learned - # AFCESA00015

Title: Loading Schedule B-2 into SPS

Designator: Pathfinder

Impact AF Wide

Submitted AFCESA

Base Patrick

Category Contracting

Lesson Approved

Sub-Category PH3-RFP Issue

Issue/Concern:

The current Schedule B-2 in the RFP template cannot be loaded into Standard Procurement System (SPS) due to its configuration. The Sole Source Template developed for Patrick AFB includes a Schedule B-2 developed by SAF/AQCO that will interface properly with SPS.

Recommendation:

Incorporate Schedule B-2 of the Sole Source RFP Template into all future RFPs.

Systems Involved: Electric Natural Gas Water Wastewater Other

Originator J. Andersen

Date 23-mar-01

Organization SAF/AQCO

DSN Phone: 425-7025

AFCESA Patterson

Commercial 703-588-7025

LLRC 30 Mar 01 - Approved by the LLRC.

AF UP Lessons Learned - # AFCESA00016

Title: Requirement to Submit UP Funding for Award

Designator: Pathfinder

Impact AF-P&G

Submitted AFCESA

Base Bolling

Category Finance

Lesson Approved

Sub-Category Other

Issue/Concern:

AF Privateers have been relying on AF/ILE to submit funding requirements for initial privatization awards. ILEIO has recently said that the Bases/MAJCOMs are required to submit their funding requirements up through FM channels as part of their FIN Plan inputs. Same goes for unfunded UP requirements. This maybe understood in the FM community but not the CE community. The Jan 2001 P&G Update identifies the MAJCOM of having the responsibility of "Identifying, programming, and budgeting utilities privatization support." The same document identifies ILE of having the responsibility of "Programming and budgeting for privatization resources." After talking with MAJCOM POCs, they are under the impression that the base FIN Plan and UP funding requirements are two different processes up to and including contract award. Normal FIN Plan process kicks in down the road after it's figured into the FYDP. Additionally, ILEIO briefing at the Phase III Workshop (8 Nov 00) stated that the UP funding requirements "for the Pathfinders" were taken through the AF Board Structure (BES-Results) through FY07.

Recommendation:

P&G Clarification is required in order to ensure MAJCOMs understand that funding requests for UP awards need to go through the normal budgeting process, including unfunded requirements (i.e., POM Disconnects).

Systems Involved: Electric Natural Gas Water Wastewater Other

Originator F. Nehrings

Date 12-mar-01

Organization HQ AFCESA/CEOC

DSN Phone: 523-6525

AFCESA Nehrings

Commercial 850-283-6525

LLRC 30 Mar 01 - LLRC agreed to table this lesson until next meeting.

30 May 01 - LLRC approved lesson

AF UP Lessons Learned - # AFCESA00017

Title: GCE Development

Designator: Pathfinder

Impact AF Wide

Submitted AFCESA

Base TRD

Category Technical

Lesson Approved

Sub-Category PH3-GCE

Issue/Concern:

The Government Cost Estimate (GCE) is developed mainly with the base CE and FM personnel and given to the CO before bids are submitted. In most cases, the CO is not educated on what went into the GCE and cannot field general questions from offerors, especially in the cases where the CO is not connected with the base or in the case where DESC is the Contracting agent

Recommendation:

In developing the GCE, ensure the Contracting Officer is educated on the process and final numbers in addition to the base CE and FM folks. Include the CO in any meetings with the A-E and base associated with the GCE.

Systems Involved: Electric Natural Gas Water Wastewater Other

Originator L. Richardson

Date 08-jun-01

Organization HQ AFCESA/CEOC

DSN Phone: 523-6372

AFCESA Wolf

Commercial 281-538-9768

LLRC 24 Aug 01 - Approved by the LLRC.

AF UP Lessons Learned - # AFCESA00018

Title: RFP Exceptions

Designator: Pathfinder

Impact AF-RFP Template

Submitted AFCESA

Base TRD

Category Technical

Lesson Approved

Sub-Category PH2-DCAR

Issue/Concern:

The exceptions to terms and conditions in the RFP are identified to be submitted by the offeror in Volume III and may be overlooked during the review process.

Recommendation:

Since the Tech and Price team's focus is on Volumes I and IV, the exceptions may be overlooked. Suggest the RFP template be modified for the offeror to submit any exceptions to terms and conditions in the respective Volume that the exception occurs as well as Volume III so

Systems Involved: Electric Natural Gas Water Wastewater Other

Originator L. Richardson

Date 08-jun-01

Organization HQ AFCESA/CEOC

DSN Phone: 523-6372

AFCESA Wolf

Commercial 281-538-9768

LLRC 24 Aug 01 - Approved by the LLRC.

AF UP Lessons Learned - # AFCESA00019

Title: Price Proposal Clarification

Designator: Pathfinder

Impact AF-RFP Template

Submitted AFCESA

Base TRD

Category Technical

Lesson Approved

Sub-Category PH2-DCAR

Issue/Concern:

Offerors prices are being submitted in various years and needs to be clarified so it can be compared with the GCE.

Recommendation:

Clarify the language in paragraph B 5.2.2 (second paragraph) to let the offeror know what the anticipated year of privatization will be for that specific project so they can prepare their prices

Systems Involved: Electric Natural Gas Water Wastewater Other

Originator L. Richardson

Date 08-jun-01

Organization HQ AFCESA/CEOC

DSN Phone: 523-6372

AFCESA Wolf

Commercial 281-538-9768

LLRC 24 Aug 01 - Approved by the LLRC.

AF UP Lessons Learned - # AFCESA00020

Title: Initial Capital Upgrade Estimate Conflict

Designator: Pathfinder

Impact AF-RFP Template

Submitted AFCESA

Base All

Category Finance

Lesson Approved

Sub-Category PH3-RFP Issue

Issue/Concern:

RFP Section C.11.2 states "... The remaining four (4) years covered by the Plan shall include upgrade lists with upgrade descriptions, prices, order-of-magnitude estimates, and proposed site plans."

RFP Section H.10.1 states "The price for each initial capital upgrade is fixed and is not subject to renegotiation under Clause I.7.1. The price for each upgrade will be amortized at the term and interest rate proposed by the offeror in Schedule L-3 of the Price Proposal. "

These two statements are in conflict. You can not ask for order-of-magnitude estimates that are

Recommendation:

RFP Template team should review this issue and determine if there is a way to clarify the intent of these two statements.

Systems Involved: Electric Natural Gas Water Wastewater Other

Originator T. Burns

Date 08-jun-01

Organization HQ AFCESA/CESC

DSN Phone: 523-6263

AFCESA N/A

Commercial 850-283-6263

LLRC 24 Aug 01 - Approved by LLRC.

AF UP Lessons Learned - # AFCESA00021

Title: Requirement to not pay until improvement is "put into useful service"

Designator: Pathfinder

Impact AF Wide

Submitted AFCESA

Base All

Category Finance

Lesson Under Review

Sub-Category PH3-RFP Issue

Issue/Concern:

The Air Force makes progress payments on most, if not all, contracts. We certainly make progress payments on all MILCON construction projects. Paragraphs H.10.1 and H.10.2 unnecessarily require the contractor wait until projects are completed before getting paid. This adds unnecessary interest expenses to the project that the AF has to pay for.

On the other hand, we are allowing the contractor to get paid ahead of timer for R&R work.

Recommendation:

Eliminate the requirement that capital upgrade projects have to be complete before we pay for

Systems Involved: Electric Natural Gas Water Wastewater Other

Originator T. Burns

Date 08-jun-01

Organization HQ AFCESA/CESC

DSN Phone: 523-6263

AFCESA Smeltzer

Commercial 850-283-6263

LLRC

24 Aug 01 - LLRC decided to send this lesson to AQCK for GCN review and approval

20 Feb 02 - LLRC decided to continue HOLD: Smeltzer action item.

AF UP Lessons Learned - # AFCESA00022

Title: Alternate Proposals

Designator: Pathfinder

Impact AF-RFP Template

Submitted AFCESA

Base All

Category Finance

Lesson Approved

Sub-Category PH3-RFP Issue

Issue/Concern:

Bidders are allowed to submit alternate proposals that change any requirement of the RFP. This makes it impossible to do a cost evaluation.

Recommendation:

Technical team needs to re-evaluate the acceptance of alternate proposals. Possibility exists that 2 bid schedules could be included in the RFP (e.g. - one for regulated bidders and one for

Systems Involved: Electric Natural Gas Water Wastewater Other

Originator T. Burns

Date 08-jun-01

Organization HQ AFCESA/CESC

DSN Phone: 523-6263

AFCESA N/A

Commercial 850-283-6263

LLRC 24 Aug 01 - Approved by the LLRC.

AF UP Lessons Learned - # AFCESA00023

Title: Handling initial Capital Upgrades in the GCE

Designator: Pathfinder

Impact AF-RFP Template

Submitted AFCESA

Base All

Category Finance

Lesson Approved

Sub-Category PH3-RFP Issue

Issue/Concern:

Offerors are proposing different initial capital upgrades. However, the GCE will only show one set of initial capital upgrades.

Recommendation:

The Technical Review team needs to validate all initial capital upgrades. All validated initial upgrades are then added to section J of the RFP and provided to each offeror for inclusion in their estimate. All validated initial capital upgrades are added to the GCE. Any unvalidated upgrades proposed are just included on the privatized side for that offeror. Based on the projects proposed from the offerors, the team should refer to the table posted on the AFCESA website for "Project Types Likely to be Found in Schedule L-3."

Systems Involved: Electric Natural Gas Water Wastewater Other

Originator T. Burns

Date 15-jun-01

Organization HQ AFCESA/CESC

DSN Phone: 523-6263

AFCESA N/A

Commercial 850-283-6263

LLRC

24 Aug 01 - LLRC decided to review minutes from last visit from ILEXO and determine the five categories of upgrades and include them as part of this lesson. Lesson to be reviewed at next meeting.

AF UP Lessons Learned - # AFCESA00024

Title: Reimbursement for utilities

Designator: Pathfinder

Impact AF Wide

Submitted AFCESA

Base All

Category Finance

Lesson Disapproved

Sub-Category PH3-Evaluation

Issue/Concern:

Paragraph 8 of the ROW requires the new owner to pay for any utilities they use. I do not believe any bidder has included this in their proposal. Additionally, there is nothing in the RFP or ROW that tells them what is the current rates for each utility and estimated consumption.

Recommendation:

The RFP should identify current non-government utility rates for utilities and estimated consumption for the bidders to use in preparing their proposals.

Systems Involved: Electric Natural Gas Water Wastewater Other

Originator T. Burns

Date 25-jun-01

Organization HQ AFCESA/CESC

DSN Phone: 523-6263

AFCESA N/A

Commercial 850-283-6263

LLRC

24 Aug 01 - LLRC decided to diapprove this lesson because there is no requirement for a breakout of these line items.

AF UP Lessons Learned - # AFCESA00025

Title: Digging Permits

Designator: Pathfinder

Impact AF Wide

Submitted AFCESA

Base All

Category Finance

Lesson Disapproved

Sub-Category PH3-Evaluation

Issue/Concern:

Nothing is mentioned in the RFP or ROW about the requirement for the new owner to mark or provide maps of their utility lines for digging permits.

Recommendation:

Include a requirement for the new owner to identify their utility lines for digging permits.

Systems Involved: Electric Natural Gas Water Wastewater Other

Originator T. Burns

Date 25-jun-01

Organization HQ AFCESA/CESC

DSN Phone: 523-6263

AFCESA N/A

Commercial 850-283-6263

LLRC 24 Aug 01 - LLRC decided to disapprove this lesson because both these issues are covered in the ROW under sections 11.4 and items

AF UP Lessons Learned - # AFCESA00026

Title: Recommend Change to RFP Template - Military Training

Designator: Pathfinder

Impact AF-RFP Template

Submitted AFCESA

Base All

Category Contracting

Lesson Approved

Sub-Category PH3-RFP Issue

Issue/Concern:

Current RFP Template does not clearly define how military training will be accomplished as part of the privatization process. Bidders need further clarification on what must be submitted if military training is defined as a requirement.

Recommendation:

Recommend changing the RFP Template to include the following section C.14:

C.14 Specialty Training Requirements

The contractor shall provide training to government military personnel as requested. Many installations have commitments to train personnel in support of wartime and contingency operations worldwide. This ongoing commitment relies heavily on the presence of a utility system (s) to conduct structured, individual skill training. Degradation of individual skills can seriously effect wartime and contingency operations, may result in the loss of a student's Air Force skill level (Craftsman Journeyman title), and can have a negative impact on a unit's Type Code (UTC) rating. If the Installation has such a requirement to provide individual skills training then the Contractor shall provide the required training. All training must comply with minimum requirements specified in the guidelines set forth in attachment J43, Specialty Skills Training Requirements.

Note: The Jun 01 revision to attachment J-43 developed should be included as part of the RFP Template if military training is required.

Systems Involved: Electric Natural Gas Water Wastewater Other

Originator D. Patterson

Date 07-sep-01

Organization HQ AFCESA/CEOC

DSN Phone: 523-6443

AFCESA Patterson

Commercial 850-283-6443

LLRC LLRC to review lesson at next meeting.

20 Feb 02 - LLRC decided to keep on hold. Smeltzer & Young will review and take action.

20 May 02 - LLRC approved.

POC: B. Smeltzer
Area: RFP
Comp'l Date: 31 May 02

AF UP Lessons Learned - # AFCESA00027

Title: Inclusion of All Funding Sources

Designator: Pathfinder

Impact AF Wide

Submitted AFCESA

Base All

Category General

Lesson Approved

Sub-Category PH2-DCAR

Issue/Concern:

Several funding sources exist (i.e - O&M, Housing, etc) that can be used to fund the privatization of a system.

Recommendation:

When privatizing a system its important to understand which funding source will be used. For example, Housing areas have their own funding source to handle privatization.

Systems Involved: Electric Natural Gas Water Wastewater Other

Originator D. Patterson

Date 10-sep-01

Organization HQ AFCESA/CEOC

DSN Phone: 523-6443

AFCESA Patterson

Commercial 850-283-6443

LLRC

LLRC will review lesson at next meeting.

LLRC (20Feb02) - AFCESA/CES will resolve (Patterson). Latest timing--before the release of non-pathfinders. N/C in status.

20 May 02 - LLRC Approved. A separate document needs to be developed telling Air Staff how to breakout housing and etc. from UP. Notes will be placed in the PM handbook

POC: R. Wolf, E. Page/CES

Area: PM Notebook

Comp'l Date:

AF UP Lessons Learned - # AFCESA00028

Title: Extended Time for Source Selection Team Reviews

Designator: Pathfinder

Impact AF Wide

Submitted AFCESA

Base Bolling

Category Contracting

Lesson Approved

Sub-Category PH3-Evaluation

Issue/Concern:

At final consensus time/meeting, proposal details and location of information from specific proposals can be forgotten when several proposals are being reviewed simultaneously. Team members working SS tasks at their work locations have continual interruptions from normal office work/phone calls/family demands, etc. Team members must obtain supervisor consent to perform SS as primary task when reviewing proposals; and, they must complete the review of each proposal, including consensus discussion, IAW the schedule in order to maintain clarity and focus on each proposal.

[3-AFCESA and 3 Bolling AFB SS Team Members had daily commitments to their primary job

Recommendation:

1) Contracting Officers must set strict guidelines for managing the Technical Team Members Time. Demand that schedules be met. This should help reduce the six-month review of six proposals to at least three months.

2) Technical Team Members must ensure that the comments they have entered in the Electronic SS system specifically address each exact point related to in the proposal. This will help shorten the time required for consensus and cost realism meetings.

3) Schedules for proposal review that are using remote location Electronic SS system should include at least a month for each two proposals submitted.

Systems Involved: Electric Natural Gas Water Wastewater Other

Originator Dick Woodworth

Date 06-dec-01

Organization HQ AFCESA/CEOC

DSN Phone: 523-6491

AFCESA Wolf

Commercial 850-283-6491

LLRC 20 Feb 02 - LLRC decided to keep on hold. Action for Wolf to revise recommendations and provide specifics.

AF UP Lessons Learned - # AFCESA00029

Title: Keeping Base Civil Engineer Involved in Certified Economic Model

Designator: Pathfinder

Impact AF Wide

Submitted AFCESA

Base TRD

Category Finance

Lesson Approved

Sub-Category PH3-GCE

Issue/Concern:

Base Civil Engineer (BCE) needs to be kept informed throughout the UP process including briefing him/her on the Certified Economic Model (CEM) and his/her responsibility for certifying

Recommendation:

1) Provide the base/MAJCOM FM and the BCE a copy of the Draft CEA with real Status Quo and 'dummy' bidder raw data for their review early on. This can be done anytime during the Source Selection (SS) process. This will familiarize him/her with the documents and serve to precertify the Status Quo data.

Systems Involved: Electric Natural Gas Water Wastewater Other

Originator Randy Wolf

Date 30-jan-02

Organization HQ AFCESA/CEOC

DSN Phone: 850-0618

AFCESA Wolf

Commercial 850-283-6187

LLRC

20 Feb 2002 - LLRC comment: Base POC & IPT must ensure Base Civil Engineer (BCE) is kept informed throughout the UP process. Maintain lines of communication including briefing the Certified Economic Model (CEM). BCE certifies the CEM along with FM.

AF UP Lessons Learned - # AFCESA00030

Title: Keep Financial Management (FM) community informed throughout Utilities Privatization

Designator: Pathfinder

Impact AF Wide

Submitted AFCESA

Base TRD

Category Finance

Lesson Approved

Sub-Category PH3-CEA

Issue/Concern:

The base and MAJCOM Financial Management (FM) community continued involvement is necessary to fully understand the economics of the Government cost and bidder costs and

Recommendation:

Strongly recommend an Financial Management (FM) representative from either/both MAJCOM/base serve on the Source Selection (SS) Pricing Team.

Systems Involved: Electric Natural Gas Water Wastewater Other

Originator Randy Wolf

Date 30-jan-02

Organization HQ AFCESA/CEOC

DSN Phone: 850-6187

AFCESA Wolf

Commercial 850-283-6187

LLRC

20 Feb 02 - LLRC comment: The FM person is a full member of the SS Team and member of the IPT. The Contracting Officer must ensure the MAJCOM/Base FM person is a member and functions on the team.

AF UP Lessons Learned - # AFCESA00031

Title: Due Dilligence Visits

Designator: Pathfinder

Impact MAJCOM Only

Submitted AFCESA

Base TRD

Category Contracting

Lesson Approved

Sub-Category PH3-Negotiation

Issue/Concern:

Scheduling and Timing of Due Dilligence Visits to the locations recommended by the offerors

Recommendation:

1) If MAJCOM wants to perform and fund Due Dilligence visits to the references that the offerors have provided, these visits should be conducted following negotiations with the offerors and during the period when the offerors are preparing their revised proposals.

2) The Contracting Officer should work with the MAJCOM to identify personnel to conduct the visits and to schedule the visits.

3) These actions will ensure that the results of the visits are made available to the Past Performance Team to complement their recommendations.

Systems Involved: Electric Natural Gas Water Wastewater Other

Originator Randy Wolf

Date 07-dec-02

Organization HQ AFCESA/CEOC

DSN Phone: 523-6187

AFCESA Wolf

Commercial 850-283-6187

LLRC

20 Feb 02 - LLRC decided that this LL does not add anything to the process. This event is held at the discretion of the Contracting Officer or MAJCOM/Base. It is part of the Acquisition Planning function. MAJCOM or the requested entity funds.

AF UP Lessons Learned - # AFCESA00032

Title: Sufficient Base Access for the Offerors

Designator: Pathfinder

Impact AF Wide

Submitted AFCESA

Base TRD

Category Contracting

Lesson Approved

Sub-Category PH3-Site Visit

Issue/Concern:

Limiting Offerors Access to Parts of the Base and the Utility Systems during the Pre-Proposal Conferences/Site Visits May Impact their Proposal Preparation

Recommendation:

MAJCOM provide guidance to the base and assure that the offerors are allowed access to those utility systems which they are planning and revising proposals for.

Systems Involved: Electric Natural Gas Water Wastewater Other

Originator Randy Wolf

Date 07-dec-01

Organization HQ AFCESA/CEOC

DSN Phone: 523-6187

AFCESA Wolf

Commercial 850-283-6187

LLRC

This is a Contracting activity for which the MAJCOM, base, or whomever requests it must pay the cost. Nothing is added to the Acquisition process. Function is at the discretion of the Contracting Officer or MAJCOM

The contracting Officer must ensure the offerors have access to the

AF UP Lessons Learned - # AFCESA00035

Title: RFP Complexity (similar to ANG LL #4)

Designator: Pathfinder

Impact AF Wide

Submitted AFCESA

Base TRD

Category Contracting

Lesson Disapproved

Sub-Category PH3-RFP Issue

Issue/Concern:

This lesson learned extends beyond the ANG minor installations to TRD with Municipalities capable of owning/operating utilities. Example: Municipality submits a very short, incomplete proposal, although it had a reputation for providing high quality utilities services. There is evidence showing that:

1) offerors have the resources to respond to the current version of the RFP, they do not believe their effort is warranted based on the relatively small potential return from the minor ANG installations.

Recommendation:

- 1) Take a look at non-Federal solicitations to compare proposal complexity for Privatizing,
- 2) A streamlined Air Force SS RFP is currently under way for these situations.

Systems Involved: Electric Natural Gas Water Wastewater Other

Originator Wolf

Date 07-dec-01

Organization HQ AFCESA/CEOC

DSN Phone: 523-6187

AFCESA Smeltzer

Commercial 850-283-6187

LLRC

20 Feb 02 - LLRC decided to HOLD for further investigation. Combine with LL--RFP Improvement for Small Installations. Smeltzer is POC for this action.

20 May 02 - LLRC disapproved.

POC: B. Smeltzer
Area: RFP

AF UP Lessons Learned - # AFCESA00036

Title: RFP Template Errata Sheet Information

Designator: Pathfinder

Impact AF Wide

Submitted AFCESA

Base TRD

Category Contracting

Lesson Approved

Sub-Category PH3-RFP Issue

Issue/Concern:

Include approved changes made to the original AF RFP in the form of ERRATA sheets

Recommendation:

AFCESA ensure that changes to the RFP template that were distributed to the pathfinder bases as errata sheets are integrated into the next generation FRP template for consideration on the Non-Pathfinder solicitations.

Systems Involved: Electric Natural Gas Water Wastewater Other

Originator Scott

Date 07-dec-01

Organization HQ AFCESA/CEOC

DSN Phone: 523-6523

AFCESA Scott

Commercial 850-283-6523

LLRC 20 Feb 02. LLRC - Approved.

AF UP Lessons Learned - # AFCESA00037

Title: Planning SourceSelection (SS) Team Member Evaluation Schedules

Designator: Pathfinder

Impact AF Wide

Submitted AFCESA

Base TRD

Category Contracting

Lesson Approved

Sub-Category PH3-Evaluation

Issue/Concern:

Sufficient time to evaluate proposals. Some tasks were too optimistic and overlooked work intrinsic to the process

Recommendation:

Source Selection (SS) team member's evaluation schedules need to be more realistic to allow adequate time to complete the tasks assigned.

Systems Involved: Electric Natural Gas Water Wastewater Other

Originator Wolf

Date 07-dec-01

Organization HQ AFCESA/CEOC

DSN Phone: 523-6187

AFCESA Scott

Commercial 850-283-6187

LLRC 20 Feb 02. LLRC decided to revise and review again.

20 May 02 - LLRC approved. Additional days will be added to the process schedule IAW lessons learned from Pathfinders.

POC: Voight, Smeltzer
Area: Schedule, RFP
Date:

AF UP Lessons Learned - # AFCESA00038

Title: Include Level of Detail in the Program Plan/Schedule

Designator: Pathfinder

Impact AF-RFP Template

Submitted AFCESA

Base TRD

Category Contracting

Lesson Disapproved

Sub-Category PH2-CAR

Issue/Concern:

Adequate program detail in executing the privatization process affected time, resources, and schedules (impacts to milestones), and left gaps in task responsibilities.

Examples: Cost model changes authorizations, inventory definitions, defining/coordinating funding requirements and approvals, timely tio-level coordination on process changes and unique requirements/amendments

Recommendation:

Systems Involved: Electric Natural Gas Water Wastewater Other

Originator Wolf

Date 21-feb-02

Organization HQ AFCESA/CEOC

DSN Phone: 523-6187

AFCESA Scott

Commercial 850-283-6187

LLRC 2/20/2002: LLRC disapproved. Does not change process or schedule. Not enough information.

AF UP Lessons Learned - # AFCESA00039

Title: Plan Funding for Unknowns

Designator: Pathfinder

Impact AF Wide

Submitted AFCESA

Base TRD

Category General

Lesson Disapproved

Sub-Category Other

Issue/Concern:

Lack of funds to cover unknowns. Examples are: modifications/amendments made by the Policy & Guidance (P&G), Economic Analyses, Areal Descriptions, RFP, and etc.

Affected parties: bidders, Base resources, housing program, Defense Energy Support Center (DESC), and AFCESA Architectural Engineers (A-Es).

Expecting A-Es to perform too many 'No-Cost' changes for minor modifications

Recommendation:

Funds for unknowns should be strategically planned up-front and early on to be applied to the AE contract for changes to the UP program.

Systems Involved: Electric Natural Gas Water Wastewater Other

Originator Patterson

Date 21-feb-02

Organization HQ AFCESA/CEOC

DSN Phone: 523-6443

AFCESA Scott

Commercial 850-283-6443

LLRC 20 Feb 02. LLRC decided to Hold and review again.

20 May 02 - LLRC disapproved. Too general; need to be more specific.
No change to the process identified.

POC:

Area:

Date:

AF UP Lessons Learned - # AFCESA00040

Title: Use of Source Selection Tools

Designator: Pathfinder

Impact AF Wide

Submitted AFCESA

Base TRD

Category Contracting

Lesson Approved

Sub-Category PH3-RFP Issue

Issue/Concern:

Formal approval to allow Source Selection (SS) team members to use the SStool to interact with each other from remote locations.

Commitment by members and their organizations to support use of the tool in Source Selections

Recommendation:

1) Contracting Officers approve use of the SS Tool

2) Schedule and complete Training for all participants on the team including leadership

3) Obtain and have in place all computer access/authorizations/equipment prior to receipt of offerors proposals.

Systems Involved: Electric Natural Gas Water Wastewater Other

Originator Smeltzer

Date 21-feb-02

Organization HQ AFCESA/CEOC

DSN Phone: 523-6988

AFCESA Smeltzer

Commercial 850-283-6988

LLRC 20 Feb 02. LLRC Approved.

AF UP Lessons Learned - # AFCESA00041

Title: Offer Acceptance Period

Designator: Pathfinder

Impact AF Wide

Submitted AFCESA

Base All

Category Contracting

Lesson Approved

Sub-Category PH3-RFP Issue

Issue/Concern:

DESC Contracting makes the Offer Acceptance Period 300 days for all UP RFPs. There has been an instance where the acceptance period expired and the offeror refused to extend it, effectively making their offer void. The expiration date for acceptance of offers must be

Recommendation:

Project Managers should include the Offer Acceptance Period end date on their list of critical milestones, and ensure that DESC Contracting Officers notify potentially affected offerors far enough in advance to allow those offerors to extend the original date if required.

Systems Involved: Electric Natural Gas Water Wastewater Other

Originator Smeltzer

Date 27-feb-02

Organization AFCESA/CEOC

DSN Phone: 523-6988

AFCESA Smeltzer

Commercial 850-283-6988

LLRC

20 Feb 02 - LLRC approved. LLRC may recommend a change to the 300 days (DESC) and allow a different amount of time based on Pathfinders.

POC: B. Smeltzer
Area: RFP/PM Notebook

AF UP Lessons Learned - # AFCESA00042

Title: Value Engineering Principles In Negotiating Utility Replacements

Designator: Pathfinder

Impact Base Only

Submitted AFCESA

Base Eglin

Category Technical

Lesson Disapproved

Sub-Category PH3-Negotiation

Issue/Concern:

At Minnesota-St. Paul ARS and Eglin AFB there was and opportunity to apply Value Engineering Principles and reduce the cost of replacing the natural gas utility line by:

- 1) rerouting the replacement/revitalization lines
- 2) using slip-lining as the replacement method

This resulted in greatly reduced initial replacement /refurbishment costs. 1) At Minn-St Paul, the original 10,082 LF was reduced to approximately 2,000 LF. PACES estimated the cost to replace 10,082 LF to be approximately \$270K. Final construction cost plus one year of metering service cost using re-routing the lines and slip-lining was \$33,845; an Air Force savings of approximately \$236K. 2) Using Value Engineering at Eglin AFB, the initial replacement costs for the natural gas lines is zero; an Air Force savings of approximately \$1.5M

Recommendation:

SSET members should consider opportunities to use Value Engineering Principals when replacement/refurbishments to base underground utilities are being considered. Two methods of potentially reducing replacement costs are:

- 1) consider re-routing of the utility lines for the most direct vectored routes reducing overall utility LF.
- 2) consider slip-lining the pipes and reduce overall construcion/labor/equipment costs, and
- 3) when this replacment scenario is applied, the award date should not be the "driver."

Systems Involved: Electric Natural Gas Water Wastewater Other

Originator G. Onorato

Date 10-dec-01

Organization AFCESA

DSN Phone: 523-6374

AFCESA Onorato

Commercial 850-283-6374

LLRC

LLRC: Disapproved. It was felt that this was a base unique effort and not needed for all bases or the Template. It is a lessons learned for PMs.

AF UP Lessons Learned - # AFCESA00043

Title: Statement of Qualifications (SOQs)

Designator: Pathfinder

Impact AF-RFP Template

Submitted AFCESA

Base TRD

Category Contracting

Lesson Under Review

Sub-Category PH3-RFP Issue

Issue/Concern:

TRD proposers had the option of submitting the SOQs. It was thought initially that the Government could capture some significant information about the proposer from the SOQs. Since the proposer has the option to submit the information, it nullifies the intent of the SOQ and therefore of no beneficial use to the Government in delineating any proposer deficiencies. The Government has since perceived that SOQs are not required and the information provided in the SOQ and the evaluation of the SOQ will not be used in evaluating an offerors proposal or impact the rating of an offerors proposal. This adds to the complexity of the RFP and burden on the

Recommendation:

Recommend deletion of the SOQ activity from the RFP. The AF IPT approved using the Statement of Qualifications (SOQ) as an optional requirement in the solicitation process, however, the Government obtains no real benefit from this activity.

Systems Involved: Electric Natural Gas Water Wastewater Other

Originator W.Owens/R. Wolf

Date 02-feb-00

Organization AFCESA

DSN Phone: 523-6187

AFCESA Wolf

Commercial 850-283-6187

LLRC

3/19/02: LLRC approved. COORD THRU AF IPT. The status remains Under Review until the IPT review. However, for planning purposes and draft of the RFP Template, the SOQ requirement will be deleted from the

AF UP Lessons Learned - # AFCESA00044

Title: Due Diligence Team Members

Designator: Pathfinder

Impact Base Only

Submitted AFCESA

Base TRD

Category Contracting

Lesson Approved

Sub-Category PH3-RFP Issue

Issue/Concern:

The Government need to get the best contractor possible to own the utilities. Visits to the contractors' facilities and the references they provided in their proposals should be made by persons familiar with the Base, selection process, contracting, and management.

Recommendation:

Recommend that members of the technical team and the program manager accomplish these visits with the contracting officer, because they are knowledgeable of the offerors' technical proposals. Also, all organizations with a vested interest are represented by members of the SSET who have the appropriate level of expertise required to accomplish the due diligence visits.

Systems Involved: Electric Natural Gas Water Wastewater Other

Originator L. Richardson

Date 16-feb-00

Organization AFCESA

DSN Phone: 523-6187

AFCESA Wolf

Commercial 850-283-6187

LLRC LLRC: 4/5/02- Approved

AF UP Lessons Learned - # AFCESA00045

Title: Approval Process for Transferring Property Using the GSA Area-wide

Designator: Non-Pathfinder

Impact AF Wide

Submitted AFCESA

Base Eglin

Category Contracting

Lesson Approved

Sub-Category PH3-RFP Issue

Issue/Concern:

10 USC 2688 sets the policy for Utility Systems Conveyance [conveying/transferring property].

It requires congressional approval. Although the GSA Areawide vehicle provides a quicker and shorter process to select the contractor, congressional approval is still required when Government property is being transferred.

Recommendation:

When using the GSA Area-wide, include enough time in the schedule to obtain congressional

Systems Involved: Electric Natural Gas Water Wastewater Other

Originator D. Patterson

Date 13-apr-02

Organization AFCESA

DSN Phone: 523-6187

AFCESA Wolf

Commercial 850-283-6443

LLRC

LLRC: 4/5/2002 - Approved. Property is of "no value" for transfer using GSA Areawide contract.

AF UP Lessons Learned - # AFCESA00046

Title: RFP Solicitation Closing Date Extensions

Designator: Pathfinder

Impact Unknown

Submitted AFCESA

Base TRD

Category Contracting

Lesson Approved

Sub-Category PH3-CBD

Issue/Concern:

Original proposals were due within 90 days (19 Jan to 21 April 00). The offerors needed more time to submit the proposals. This date was extended to 20 Jun 00 (60 days). Government extended again to 18 Sep 00 (90 days) to allow more time for offerors.

Recommendation:

Use 120 days for the solicitation period.

Systems Involved: Electric Natural Gas Water Wastewater Other

Originator L. Richardson

Date 24-mar-00

Organization AFCESA

DSN Phone: 523-6187

AFCESA Wolf

Commercial 850-283-6187

LLRC 3/19/02: LLRC approved 120 day solicitation period.

AF UP Lessons Learned - # AFCESA00047

Title: Tracking Offerors' Bid Expiration Date

Designator: Pathfinder

Impact Base Only

Submitted AFCESA

Base Eglin

Category Contracting

Lesson Approved

Sub-Category PH3-RFP Issue

Issue/Concern:

Overlooking or allowing the offerors bid to expire will cause the proposal to be null and void and the procurement process has to begin again. We need to track the offerors bid expiration date as established within the proposal.

Recommendation:

The PM should track each offeror's bid expiration date to assure timely response. Consider adding an entry in the project schedule that require entering the offeror's bid expiration date and

Systems Involved: Electric Natural Gas Water Wastewater Other

Originator J. Scot

Date 05-apr-02

Organization AFCESA

DSN Phone: 523-6523

AFCESA Onorato

Commercial 850-283-6523

LLRC LLRC: 4/5/02: -Approved

AF UP Lessons Learned - # AFCESA00048

Title: Additional Site Visits to the Base

Designator: Pathfinder

Impact AFCESA Only

Submitted AFCESA

Base TRD

Category General

Lesson Approved

Sub-Category PH3-RFP Issue

Issue/Concern:

Proposers are allowed a site visit to the Base during the period that they are preparing their proposals to physically see the utility systems they are interested in owning. During proposal negotiations, the contractor may realize that they may need another review of the utility system in order to refine their cost proposal, especially regarding the service life of the system components. The component replacement costs over 50 years have a significant impact on the total proposal amount. At Bolling AFB, questions arose about the remaining service life of some high value components and differences between their estimates and the Government's estimate.

This led to the Government allowing another site visit and a two-week delay in schedule while a second revised proposal was submitted. A second visit was also allowed for TRD proposers.

Recommendation:

1) The Air Force should allow time in the project schedule for a second site visit for the proposers to see the utility systems with an accompanying two week resubmittal time with each visit.

2) For first-time proposers contracting with the Government, additional time maybe necessary to help them understand the inventory data given to them. During the negotiation conference with the proposers, the CO should ensure the option for a second site visit is presented. The visit

Systems Involved: Electric Natural Gas Water Wastewater Other

Originator R. Wolf

Date 15-feb-02

Organization AFCESA

DSN Phone: 523-6187

AFCESA Wolf

Commercial 850-283-6187

LLRC LLRC: Approved. Important to AFCESA Schedule

AF UP Lessons Learned - # AFCESA00049

Title: Due Diligence Questions

Designator: Pathfinder

Impact Base Only

Submitted AFCESA

Base TRD

Category Contracting

Lesson Approved

Sub-Category PH3-RFP Issue

Issue/Concern:

During Due Diligence visits to the Base, the contracting officer needs to be prepared to ask the right questions and see the data needed to adequately address the Air Force's concerns. These visits are conducted after the evaluations, therefore the SSET Technical team and CO have knowledge of the offerors capability and can prepare the right questions to use.

Recommendation:

- 1) Use the following questions developed by HQ AETC and supplement as necessary:
 - 1). In the proposal, the offeror discusses three service center. The government would like to conduct a walk through of one the service centers and, observe an actual service calling being received.
 - 2). The proposal discuss a survey feedback card that customers complete to express their opinions of service. The government would like a sample of the survey feedback card.
 - 3). The government would like to conduct a walk through of an equipment yard to view general conditions of vehicles (bucket trucks, pump truck, pick up vehicles etc)
 - 4). The government would like to conduct a walk through of 2 of the 3 treatment plants referenced in the proposal.
 - 5). The government would like to walk through the inventory warehouse if applicable.
 - 6). The government would like to discuss how recapitalization projects are handled. What procedures will be implement or followed in order to determine when system components need to be replaced.
 - 7). How long are service records retained. Is the process manual or automated?
 - 8). Is it possible to meet a few of the actual service personnel who will be involved in the operation and maintenance of the system as identified within the proposal?
 - 9). The government would like to obtain and review a copy of the offerors' Annual Report.
 - 10). The government would like to review some of your outage information records about outages occurring within the last six years.
 - 11). The government would like to discuss with you some examples of how your value system

Systems Involved: Electric Natural Gas Water Wastewater Other

Originator R. Wolf

Date 15-feb-02

Organization AFCESA

DSN Phone: 523-6187

AFCESA Wolf

Commercial 850-283-6187

LLRC LLRC: 4/5/02 - Approved

AF UP Lessons Learned - # AFCESA00050

Title: TRD RFP Pricing Schedule Instructions

Designator: Pathfinder

Impact Unknown

Submitted AFCESA

Base TRD

Category Contracting

Lesson Approved

Sub-Category PH3-RFP Issue

Issue/Concern:

This Amendment added Schedules B-2, L-1, and L-3 to Section L.9.5 – Organization of the RFP solicitations. It instructed the offerors on how to submit their detailed breakout of monthly charges (L-1), their Renewals and Replacement Capital Upgrade Schedules (by year- L-2), and breakout of variable monthly cost charge changes (L-3).

Recommendation:

Review the Revised RFP Template (Rev. 01, Jun 00) and verify that these changes to Section L.9.5- Organization are included.

Systems Involved: Electric Natural Gas Water Wastewater Other

Originator L. Richardson

Date 11-oct-00

Organization AFCESA

DSN Phone: 523-6187

AFCESA Wolf

Commercial 850-283-6187

LLRC 19 Mar 02: LLRC approved

AF UP Lessons Learned - # AFCESA00051

Title: Program Milestone Review

Designator: Pathfinder

Impact Base Only

Submitted AFCESA

Base TRD

Category General

Lesson Approved

Sub-Category PH3-RFP Issue

Issue/Concern:

When several issues impacting the program are at hand, a meeting with all key participants in position to make programmatic decisions should be held. During TRD Due Diligence and evaluations, the SSA had questions regarding tasks and schedule.

Recommendation:

At the point of conducting the Due Diligence visits, SSA should review the program and consider conducting a meeting with all participants, with Air Staff presence, to verify milestones, expectations, and tasks and keeping the program on track.

Systems Involved: Electric Natural Gas Water Wastewater Other

Originator R. Wolf

Date 05-apr-02

Organization AFCESA

DSN Phone: 523-6187

AFCESA Wolf

Commercial 850-283-6187

LLRC LLRC: 4/5/2002 - Approved

AF UP Lessons Learned - # AFCESA00052

Title: Contact of Nonpathfinder POCs

Designator: Pathfinder

Impact AF Wide

Submitted AFCESA

Base All

Category General

Lesson Approved

Sub-Category PH3-RFP Issue

Issue/Concern:

Many non-pathfinder Bases are on hold and not participating in current UP activities. They are not kept informed on the future plans and direction of UP; and, therefore some are misinformed. With this, it will be very difficult to re-start the bases once the direction is received to continue UP for the non-pathfinder bases. Continued, interim contact with the Base UP POCs will help to keep them informed and ready to move quickly on AF direction to re-start. This will save

Recommendation:

MAJCOM and PMs make frequent contact with the Base POCs and provide the status of the UP program.

Systems Involved: Electric Natural Gas Water Wastewater Other

Originator J. Scot

Date 05-apr-02

Organization AFCESA

DSN Phone: 523-6523

AFCESA Scott

Commercial 850-283-6523

LLRC LLRC- 4/5/02: Approved

AF UP Lessons Learned - # AFCESA00053

Title: Econ Analysis Review Process for UP

Designator: Pathfinder

Impact AF-P&G

Submitted AFCESA

Base TRD

Category Contracting

Lesson Under Review

Sub-Category PH3-RFP Issue

Issue/Concern:

All must follow the guidance in reviewing the economic analyses. The TRD and Dobbins Pathfinder efforts have pointed out that the "Cost Analysis" for the SSET downselect tentative decision needs to be reviewed by at least HQ AFCESA prior to the SSET briefing to the SSA. This was not a deliverable for AFCESA to receive and review. It was assumed that since the base FMs were invited to be on the pricing team that they would do a review of the "Cost

Recommendation:

1. Pre-RFP Release: Air Force A-E contractor submits the (3) Models (CEA Model, GEC Model, and GCE Supporting Data) Ph II Updated Cost Analysis, to AFCESA Base/MAJCOM CE&FM review and approval for Quality Control Check. AFCESA provides final approval to CO to proceed with RFP release.
2. SSET Cost Analysis: After opening proposals and reviewing the cost data, just prior to SSET rack-and-stack, the Air Force A-E contractor updates the GCE based on updating final Gov't approved project lists, labor rates, inflation factors, and etc. and submits it to AFCESA for quality control check. The AF A-E contractor prepares final Cost Analysis for SSET/SSA on all offerors prior to the SSA downselect and decision. AE submits the final Cost Analysis to AFCESA for review and approval.
3. The results of the SSET Source Selection, including the updated "Cost Analysis", are briefed to the SSA for a decision on Best Value offeror or winning proposal (if there is one).
4. A draft CEA is then prepared for the winning bidder only. The draft goes through the pre-FM certification process (Base, MAJCOM, and AFCESA). Comments are submitted on a standard comment form to AFCESA for consolidation.
5. The A-E makes any necessary changes resulting from the review of the Draft CEA and responds to comments on the standard comment form. AFCESA sets up a telecom between all parties to review the comments/updates for resolution. If the CEA has not made the offeror uneconomical, the A-E prepares the CEA for the final FM certification process and signatures.
6. Once Base/MAJCOM/and AFCESA have completed the Draft CEA review, the Draft CEA

Systems Involved: Electric Natural Gas Water Wastewater Other

Originator T. Burns

Date 05-apr-02

Organization AFCESA

DSN Phone: 523-6523

AFCESA Scott

Commercial 850-283-6523

LLRC LLRC: 4/5/02: Still under review. More coord needed.

AF UP Lessons Learned - # AFCESA00054

Title: Electrical Transformers in Buildings as Deficiencies

Designator: Pathfinder

Impact Base Only

Submitted AFCESA

Base TRD

Category Technical

Lesson Approved

Sub-Category PH3-RFP Issue

Issue/Concern:

A. There are transformers that may exist inside a building that by virtue of their location alone, violate a law, regulation, code provision, or ordinance. If they are in violation, the Government and offeror will treat these transformers as deficiencies and offerors will be given an opportunity to revise proposals (FAR 15.307) during evaluations.

Recommendation:

Air Force identify all transformers in buildings that violate law, regulation, code provision or ordinance and include the list as an attachment to the Section J of the RFP.

Systems Involved: Electric Natural Gas Water Wastewater Other

Originator L. Richardson

Date 11-jan-01

Organization AFCESA

DSN Phone: 523-6187

AFCESA Wolf

Commercial 850-283-6187

LLRC

LLRC: 4/2/2002. Approved. This is a base specific requirement and should not be in the RFP Template.

AF UP Lessons Learned - # AFCESA00055

Title: Differing Site Conditions Clause

Designator: Pathfinder

Impact AF-RFP Template

Submitted AFCESA

Base TRD

Category Contracting

Lesson Approved

Sub-Category PH3-RFP Issue

Issue/Concern:

Contractor submitted this concern: the solicitation does not include any provision that clearly provides relief to the contractor in the event it encounters surface or subsurface conditions that differ from those indicated in the contract documents or those typically encountered in the area of performance. Since this contract will require a good deal of construction work, suggested adding FAR 52.236-2 ("Differing Site Conditions") or equivalent language to clearly provide for equitable relief to the contractor in the event it encounters a differing site condition during

Recommendation:

This clause is incorporated in this amendment

Systems Involved: Electric Natural Gas Water Wastewater Other

Originator L. Richardson

Date 12-feb-02

Organization AFCESA

DSN Phone: 523-6187

AFCESA Wolf

Commercial 850-283-6187

LLRC LLRC- 4/5/02: Approved.

AF UP Lessons Learned - # AFCESA00056

Title: Protection and Preservation of Historic Resources/Sites/Buildings

Designator: Pathfinder

Impact Unknown

Submitted AFCESA

Base TRD

Category Contracting

Lesson Approved

Sub-Category PH3-RFP Issue

Issue/Concern:

All properties Identified as historic properties must be maintained in accordance with the recommended approaches in The Secretary of the Interior's Standards for the Treatment of Historic Properties. The Contractor must preserve historic resources and notify the Fort Bliss Contracting Officer in advance of any proposed activities (operations, maintenance, repair, upgrades, and improvements) that may impact a historic property visually or through physical

Recommendation:

Verify that the appropriate entries to Section J (water, wastewater, gas, and electric utilities) of the RFP require that the contractor preserve all national historic sites/buildings/locations/grounds and etc. as identified by the Government. Also, the contractor must get approval in writing from the contracting officer to perform any maintenance or changes to the historic resources. Reference contract language used for Fort Bliss.

Systems Involved: Electric Natural Gas Water Wastewater Other

Originator L. Richardson

Date 17-jan-01

Organization AFCESA

DSN Phone: 523-6187

AFCESA Wolf

Commercial 850-283-6187

LLRC 3/19/02: LLRC approved

AF UP Lessons Learned - # AFCESA00057

Title: Contractors as Source Selection Advisors for AF UP

Designator: Pathfinder

Impact AF Wide

Submitted AFCESA

Base TRD

Category Contracting

Lesson Approved

Sub-Category PH3-RFP Issue

Issue/Concern:

Some companies/utility proposers may be concerned about the Government use of support contractors to participate in source selection activities. They are concerned about contractors being exposed to their proposal data, security, and proprietary information. Contractors may expose sensitive information to the public. This amendment clarifies this concern and provides government contractual protection to the bidders.

Recommendation:

Verify that the RFP provides in the solicitation who (company) the government plan to use as advisors.

Add a clause to the solicitation Paragraph L.2.1.4 -Use of Non-Government Advisors.

"The clause advises offerors that data submitted to the Government in response to this solicitation may be released to non-government advisors for review and analysis. These advisors may be required to provide advice within their area of expertise regarding proposal strengths, weaknesses, inadequacies, risks, and deficiencies. Non-government advisors will be subject to civil and criminal penalties associated with any release of information pursuant to FAR Part 3.104 procurement integrity violations. They will not determine ratings of Offerors' proposals. If the Offeror has any objections to non-government advisors access to their proposal information, the Offeror shall provide grounds and justification for their objections. The non-government advisors are: [fill in the company names if necessary]"

Systems Involved: Electric Natural Gas Water Wastewater Other

Originator Wolf

Date 22-jan-01

Organization AFCESA

DSN Phone: 523-6187

AFCESA Wolf

Commercial 850-283-6187

LLRC 3/19/02: LLRC approved

AF UP Lessons Learned - # AFCESA00058

Title: UP Phase III Deliverables

Designator: Non-Pathfinder

Impact AF-RFP Template

Submitted AFCESA

Base TRD

Category Contracting

Lesson Under Review

Sub-Category PH3-RFP Issue

Issue/Concern:

Problem. The existing A-E SOW does not clearly indicate what economic analysis deliverables are required during phase III of the UP process.

Recommendation:

Recommended Solution. Modify the A-E SOW to clearly indicate what deliverables are required and what work the A-E is expected to do on these documents. Review and incorporate the appropriate changes to the AFCESA SOW as suggested by AFCESA/CES (Burns).

Systems Involved: Electric Natural Gas Water Wastewater Other

Originator J. Scott

Date 11-apr-01

Organization AFCESA

DSN Phone: 523-6523

AFCESA Scott

Commercial 850-283-6523

LLRC

AF UP Lessons Learned - # AFCESA00059

Title: Offerors Not Allowed To Include Recovery of Interest In Proposals

Designator: Pathfinder

Impact AF-RFP Template

Submitted AFCESA

Base TRD

Category Contracting

Lesson Under Review

Sub-Category PH3-RFP Issue

Issue/Concern:

Offerors were initially allowed to include recovery of interest in their proposals. The government has since ruled that this is changed and should be removed from the solicitation. The purpose of this amendment is to address questions received by offerors, delete all references to interest, add additional FAR Clauses, provide change pages and request revised Volume IV: Price Proposal to Solicitation SP0600-00-R-0009.

FAR 31.205-20, Interest and Other Financial Costs, states that "Interest on borrowings (however represented) . . . cost of financing and refinancing capital . . . are unallowable." We have revised the solicitation to remove all reference to interest as a separately priced component of the bid schedule. As stated in the Request for Proposal (RFP), initial capital upgrades are Fixed Price (FP) and are not subject to re-determination

Recommendation:

Verify that the RFP deletes the reference to interest recovery from all areas of the RFP.

Remove interest from the RFP pages in Volume IV: Price Proposal to Solicitation. Competitive FP efforts are not subject to cost principles and will be evaluated utilizing price analysis.

Systems Involved: Electric Natural Gas Water Wastewater Other

Originator R. Wolf

Date 11-apr-01

Organization AFCESA

DSN Phone: 523-6187

AFCESA Wolf

Commercial 850-283-6187

LLRC 3/19/02: LLRC approved. COORD W/AF IPT.

AF UP Lessons Learned - # AFCESA00060

Title: UP Approval Process

Designator: Pathfinder

Impact AF-P&G

Submitted AFCESA

Base TRD

Category Technical

Lesson Under Review

Sub-Category PH3-RFP Issue

Issue/Concern:

The A-Es and base/MAJCOM IPTs are confused on what the process is from when final bids are received through contract award. AFCESA/CES has developed a concise briefing on the final approval process. Send the briefing to the MAJCOM IPT and A-Es for information.

Recommendation:

AFCESA develop an updated UP approval process. Send the updated process to the MAJCOM IPT and A-Es for information.

Systems Involved: Electric Natural Gas Water Wastewater Other

Originator R. Wolf

Date 05-apr-02

Organization AFCESA

DSN Phone: 523-6187

AFCESA Scott

Commercial 850-283-6187

LLRC

AF UP Lessons Learned - # AFCESA00061

Title: Utility Specific JX Attachments

Designator: Pathfinder

Impact AF Wide

Submitted AFCESA

Base TRD

Category Technical

Lesson Approved

Sub-Category PH3-RFP Issue

Issue/Concern:

For TRD, NAS JRB Fort Worth, TX J attachment J36, delete Table 6 and replace with the following:

TABLE 6 - System Improvement Projects Wastewater Collection System NAS JRB Ft Worth.

The Air Force failed to include wastewater utility deficiencies for the Navy.

For example for the TRD, Navy Site, the following was identified: (Project Location/Project Description)

Recommendation:

Verify that the Government identified utility deficiencies for other Services are added to the appropriate JX Table (water, gas, etc.)

Systems Involved: Electric Natural Gas Water Wastewater Other

Originator R. Wolf

Date 12-feb-02

Organization AFCESA

DSN Phone: 523-6187

AFCESA Wolf

Commercial 850-283-6187

LLRC LLRC: 3/29/02 - Approved.

AF UP Lessons Learned - # AFCESA00062

Title: Listing of Potential Small Business Subcontracts

Designator: Pathfinder

Impact AF Wide

Submitted AFCESA

Base TRD

Category Contracting

Lesson Disapproved

Sub-Category PH3-RFP Issue

Issue/Concern:

Offerors wanted to know what small businesses are available as potential partners. Some government agencies/entities require inclusion of validated small business firms for relevant contracts as possible subcontractors. A list of small businesses is available to the bidders. Providing this information helps bidders reduce preparatory time for proposals. However, offerors already required to submit list of their subcontractors

Small businesses with more than 25 employees for use as possible small business subcontracting sources are provided to all potential offerors under this solicitation for water, wastewater, electric, and natural gas. Gives the POC where more information regarding small

Recommendation:

Do not include the list of potential utility subcontractors in the RFP. This is only a unique action

Systems Involved: Electric Natural Gas Water Wastewater Other

Originator R. Wolf

Date 18-jun-01

Organization AFCESA

DSN Phone: 523-6187

AFCESA Wolf

Commercial 850-283-6187

LLRC 3/19/02: LLRC Disapproved. This is a unique requirement for DESC.

AF UP Lessons Learned - # AFCESA00063

Title: Source Selection: Transition Plan and Source Selection Plan

Designator: Pathfinder

Impact AF Wide

Submitted AFCESA

Base Dobbins

Category Contracting

Lesson Approved

Sub-Category PH3-Evaluation

Issue/Concern:

The government input to the Transition Plan is sometimes inconsistent with Offerors submittals.

Recommendation:

During source selection, government representatives performing Source Selection activities are to review and verify the Government requirements stated in the Transition Plan and identify and highlight deficiencies observed with the Offerors proposal. The representatives must reconcile any deficiencies with the Offerors. Changes agreed to must be noted during the evaluation process and passed on to the respective AE (through the CO) to revise the Transition Plan.

Systems Involved: Electric Natural Gas Water Wastewater Other

Originator D. Patterson

Date 13-mar-02

Organization AFCESA

DSN Phone: 523-6443

AFCESA Onorato

Commercial 850-283-6443

LLRC 3/19/02: LLRC: Need to input the specific of the SS/TP activities.

AF UP Lessons Learned - # AFCESA00064

Title: Move Some Approval Package Documents To Later in the Process

Designator: Pathfinder

Impact AF Wide

Submitted AFCESA

Base Dobbins

Category Contracting

Lesson Approved

Sub-Category Other

Issue/Concern:

Too early in the coordination process to require the Certifiable EA (A-E/DESC), EIAP (AFCESA), and RFP w/attachments (DESC).

Recommendation:

To increase the schedule efficiency, move the Certifiable EA (A-E/DESC), EIAP (AFCESA), and RFP w/attachments (DESC) to Line 39 in the Final Tech and Price Analysis under Congressional

Systems Involved: Electric Natural Gas Water Wastewater Other

Originator D. Patterson

Date 06-mar-02

Organization AFCESA

DSN Phone: 523-6443

AFCESA Patterson

Commercial 850-283-6443

LLRC

3/15/2002. LLRC Approved. Disconnect "plans" from the CEA and approval package and move them to after contract award.

AF UP Lessons Learned - # AFCESA00065

Title: Prepare Project Summary Documents

Designator: Pathfinder

Impact AF Wide

Submitted AFCESA

Base Dobbins

Category Contracting

Lesson Approved

Sub-Category Other

Issue/Concern:

The project summary documents included in the Comprehensive Analysis Report are not required until the end of the privatization process, after Contract Award. Moving this step to after award may shorten the privatization schedule to award.

Recommendation:

Move the Project Summary document to after Contract Award in the privatization schedule.

Systems Involved: Electric Natural Gas Water Wastewater Other

Originator D. Patterson

Date 06-mar-02

Organization AFCESA

DSN Phone: 523-6443

AFCESA Patterson

Commercial 850-283-6443

LLRC 3/15/02: LLRC approved.

AF UP Lessons Learned - # AFCESA00066

Title: More Time for SSET/SSA Decision Coordination

Designator: Pathfinder

Impact AF Wide

Submitted AFCESA

Base Dobbins

Category Contracting

Lesson Under Review

Sub-Category Other

Issue/Concern:

The privatization schedule does not allow enough time for either the SSET or SSA to coordinate the tentative decision and make the downselect after the consensus on evaluations are done. If the SSA is the downselect official, there should be enough time in the schedule to allow for briefings to both the SSET and SSA as required.

Recommendation:

Identify more time for the downselect official to coordinate the decision after consensus of the evaluations is completed.

Systems Involved: Electric Natural Gas Water Wastewater Other

Originator D. Patterson

Date 06-mar-02

Organization AFCESA

DSN Phone: 523-6443

AFCESA Patterson

Commercial 850-283-6443

LLRC

AF UP Lessons Learned - # AFCESA00067

Title: Formats & Meter Data Reading

Designator: Pathfinder

Impact Base Only

Submitted AFCESA

Base TRD

Category Technical

Lesson Approved

Sub-Category Other

Issue/Concern:

Electric Distribution System.

C.

- The Contractor shall provide monthly meter reading reports IAW Paragraph J19.6, and that meet the following requirements:
- Energy Manager-Meter books with monthly consumption and demand (if applicable) meter readings shall be kept. Meter books shall also include building and meter number. Also need total monthly consumption, rate schedule, points of contact for meter questions, procedures for converting meter reads into consumption (including multipliers) and copy of contract and changes to it.
- Utility Resources Coordinator - Monthly voucher and/or billing statement with meter consumption and charges of each meter are needed to certify payment to DFAS-SA. A listing of all meters and building numbers is needed to consolidate consumption and charges for monthly consolidating reports to each customer. The multiplier, demand (kW), peak charges and any special/specific charges accrued for the month.

E. Paragraph J19.3 - second to last bullet, change bullet to read as follows:

- The Contractor shall provide monthly meter reading reports IAW Paragraph J19.6, and that meet the following requirements: The Contractor shall keep meter books with monthly consumption and demand (if applicable) for each meter reading. Meter books shall also include building address or facility number, location of meter, meter number, previous month reading, current month reading, number of days between readings, multipliers for each meter, total monthly consumption, signature or name of meter reading with phone number. In addition, points of contact for meter questions and procedures for converting meter reads into demand and consumption shall be provided. The Contractor shall coordinate with the Government to determine

Recommendation:

Procedures for converting meter reads into demand and consumption shall be provided. Revise the solicitation to incorporate the recommended changes. Contractor shall coordinate with the Government to determine the format(s) for the meter books to be delivered. At a minimum, the information will be available electronically and compatible.

Systems Involved: Electric Natural Gas Water Wastewater Other

Originator R. Wolf

Date 12-feb-02

Organization AFCESA

DSN Phone: 523-6187

AFCESA Wolf

Commercial 850-283-6187

LLRC LLRC: 4/2/02 - Approved.

AF UP Lessons Learned - # AFCESA00068

Title: AE Delivery of the Final Comprehensive Analysis Report (CAR)

Designator: Pathfinder

Impact AF Wide

Submitted AFCESA

Base Dobbins

Category Contracting

Lesson Approved

Sub-Category Other

Issue/Concern:

The AF Policy & Guidance (P&G) says the Updated CAR and Approval Package are due prior to AF approval/signatures. The CAR includes the DCEA [which is sensitive]. The two need to be separated and the CAR moved to the end of the Project schedule.

Recommendation:

- 1) Revise P&G Phase III Implementation schedule: move Updated CAR to line below Transition Operations/EBS on the project schedule.
- 2) Verify that the Updated CAR delivery agrees with contract SOW and P&G.

Systems Involved: Electric Natural Gas Water Wastewater Other

Originator D. Patterson

Date 06-mar-02

Organization AFCESA

DSN Phone: 523-6443

AFCESA Patterson

Commercial 850-283-6443

LLRC LLRC: 4/5/02- Approved

AF UP Lessons Learned - # AFCESA00069

Title: AFCESA Utilities Privatization Website Lessons Learned Database

Designator: Pathfinder

Impact Base Only

Submitted AFCESA

Base Tyndall

Category General

Lesson Approved

Sub-Category Other

Issue/Concern:

The Lessons Learned Database on the AFCESA UP Website is very large (29 Megabytes) and problems have occurred with downloading to the requestors PC in order to run. An alternate method of entering lessons learned is available on the AFCESA Website that does not require downloading of the database to submit lessons learned. This alternate method is simpler and

Recommendation:

Remove the AFCESA Utilities Privatization Lessons Learned Database from the Air Force Restricted site. Submit lessons to AFCESA using alternate method and AFCESA will enter into

Systems Involved: Electric Natural Gas Water Wastewater Other

Originator J. Scott

Date 06-mar-02

Organization AFCESA

DSN Phone: 523-6443

AFCESA Scott

Commercial 850-283-6443

LLRC 3/19/02: LLRC Approved

AF UP Lessons Learned - # AFCESA00070

Title: Remove USAF UP Competitive RFP Template from the Restricted Site

Designator: Pathfinder

Impact AF-RFP Template

Submitted AFCESA

Base TRD

Category General

Lesson Approved

Sub-Category Other

Issue/Concern:

AF Utilities Privatization RFP template is located on the AFCESA Website under a .mil restricted site and is inaccessible from many visitors needing to review the AF RFP Template.

Recommendation:

Remove the AF UP RFP Template from the .mil restricted AFCESA website and place it on the public AFCESA website for anyone to access.

Systems Involved: Electric Natural Gas Water Wastewater Other

Originator J. Scott

Date 06-mar-02

Organization AFCESA

DSN Phone: 523-6523

AFCESA Scott

Commercial 850-283-6523

LLRC LLRC - 4/5/02 . Approved.

AF UP Lessons Learned - # AFCESA00071

Title: Primary Organization Responsible for UP Schedules between AFCESA & DESC

Designator: Pathfinder

Impact AFCESA Only

Submitted AFCESA

Base All

Category Contracting

Lesson Under Review

Sub-Category Other

Issue/Concern:

Conflict exists regarding the primary organization responsible for the Pathfinder Bases schedules. Air Staff (Mr. Aimone) stated that AFCESA is the responsible office for schedules. DESC-ANG UP managers are making UP schedule changes w/Air Staff w/o coordination with AFCESA ANG Point-of-contact. AFCESA is unable to assume the lead for project schedules without support from DESC-ANG and Air Staff leadership .

Recommendation:

Obtain agreement among all parties on one organization lead for UP project schedules and reporting to higher headquarters.

- need to identify, by name, phone #, the PM person responsible for the utility /systems and provide to AFCESA.

- Desc Contracting Officer must work and/or electronic mail directly with the AFCESA PM any and all schedule changes in advance of release to higher headquarters. [currently ANG UP project schedules go through LTC Armesto-Air Staff, he forwards to AFCESA information at his

Systems Involved: Electric Natural Gas Water Wastewater Other

Originator Maj M. Prazak

Date 06-mar-02

Organization AFCESA

DSN Phone: 523-6479

AFCESA Other

Commercial 850-283-6479

LLRC

AF UP Lessons Learned - # AFCESA00072

Title: RFP Scope and Purpose Clarification

Designator: Pathfinder

Impact AF-RFP Template

Submitted AFCESA

Base TRD

Category Contracting

Lesson Approved

Sub-Category PH3-RFP Issue

Issue/Concern:

The opening statements of the RFP Template do not adequately identify the purpose of UP.

Recommendation:

Verify change made to the RFP. Revise Section B.2.1, second sentence, to read, "Concurrent with the sale of the utility system, the Government will acquire electrical distribution, natural gas distribution, water distribution, and wastewater collection/treatment service."

Systems Involved: Electric Natural Gas Water Wastewater Other

Originator W. Owens/J. Scott

Date 13-jun-00

Organization AFCESA

DSN Phone: 523-6523

AFCESA Wolf

Commercial 850-283-6523

LLRC 3/19/02: LLRC Approved.

AF UP Lessons Learned - # AFCESA00073

Title: Supplies or Services and Prices/Costs- Program Goal

Designator: Pathfinder

Impact AF-RFP Template

Submitted AFCESA

Base All

Category General

Lesson Approved

Sub-Category PH3-RFP Issue

Issue/Concern:

Provide clarification on utility systems.

Recommendation:

Section B.2.3, Change eighth sentence to read, "In addition to the sale of the utility system identified in the Bill of Sale, the Government will also acquire electrical distribution, natural gas distribution, water distribution, and wastewater collection/treatment service."

Systems Involved: Electric Natural Gas Water Wastewater Other

Originator W.Owens/J. Scott

Date 13-jun-00

Organization AFCESA

DSN Phone: 523-6523

AFCESA Wolf

Commercial 850-523-6523

LLRC 3/15/2002: LLRC Approved.

AF UP Lessons Learned - # AFCESA00074

Title: Price Proposal- Sub-CLIN AB: Fixed Monthly Cost to Operate and Maintain the Utility

Designator: Pathfinder

Impact AF-RFP Template

Submitted AFCESA

Base All

Category General

Lesson Approved

Sub-Category PH3-RFP Issue

Issue/Concern:

Offerors need clarification on how to submit the Fixed Monthly Utility Charge the new provider must charge the Government.

Recommendation:

Verify that paragraph is revised in the RFP. Revise paragraph B.5.2.2, Sub-CLIN AB, Fixed Monthly Charge. Change first paragraph to read "A Fixed Monthly Charge shall be paid for utility distribution (or collection) services. The fixed monthly charge will be multiplied by 600 months to reach the total contract cost. The Fixed Monthly Charge shall include all costs associated with the requirements of this contract. Included are the costs for operations and maintenance (including general and administrative costs) and costs for renewals and replacements as calculated in Schedule L-2. Additionally, capital upgrades as defined by paragraphs H.10.1 and H.10.2 and the recoverable portion of the purchase price as defined by paragraph H.10.3, shall be an additive to the Fixed Monthly Charge as allowed by paragraph G.3, Service Charge

Systems Involved: Electric Natural Gas Water Wastewater Other

Originator W. Owens/J. Scott

Date 13-jun-00

Organization AFCESA

DSN Phone: 523-6523

AFCESA Wolf

Commercial 850-283-6523

LLRC 3/19/02: LLRC Approved

AF UP Lessons Learned - # AFCESA00075

Title: Government Option- Retain Control of Wastewater Treatment

Designator: Pathfinder

Impact AF-RFP Template

Submitted AFCESA

Base All

Category General

Lesson Approved

Sub-Category PH3-RFP Issue

Issue/Concern:

The Government wants the option to retain ownership of the wastewater treatment and/or effluent at the point of demarcation.

Recommendation:

Verify that the paragraph is revised and in the RFP. Add the following underlined phrase to the end of the solicitation paragraph C.3.5: ". . . Where no treatment plant is being conveyed, the Government may choose to continue its current source of wastewater treatment (as opposed to collection) unless otherwise negotiated with the contractor. If the Government chooses to continue with its current source of wastewater treatment, it shall own the effluent; if it chooses to have the Contractor provide for wastewater treatment, the Contractor shall own all effluent at the point of demarcation as identified in the Right-of-Way."

Systems Involved: Electric Natural Gas Water Wastewater Other

Originator W.Owens/J. Scott

Date 13-jun-00

Organization AFCESA

DSN Phone: 523-6523

AFCESA Wolf

Commercial 850-283-6523

LLRC 3/19/02: LLRC Approved

AF UP Lessons Learned - # AFCESA00076

Title: Utility System Ownership, Employees, and Security- National Agency Check

Designator: Pathfinder

Impact AF-RFP Template

Submitted AFCESA

Base All

Category General

Lesson Approved

Sub-Category PH3-RFP Issue

Issue/Concern:

Provide clarification on who pays for the security clearance cost.

Recommendation:

Paragraph C.5.2.6: Delete the entire last sentence; "The cost . . . Government." (Note: This is covered in the Right-of-Way, I.e. 4. ACCESS.)

Systems Involved: Electric Natural Gas Water Wastewater Other

Originator W.Owens/J. Scott

Date 13-jun-00

Organization AFCESA

DSN Phone: 523-6523

AFCESA Wolf

Commercial 850-283-6523

LLRC 3/15/02: LLRC Approved - ERRATA Sheet item.

AF UP Lessons Learned - # AFCESA00077

Title: Clarification of Quality Management Plan Location in the RFP

Designator: Pathfinder

Impact AF-RFP Template

Submitted AFCESA

Base All

Category General

Lesson Approved

Sub-Category PH3-RFP Issue

Issue/Concern:

Clarification on location of Quality Management Plan in Section L, Instructions to Offerors.

Recommendation:

Section C.12, Quality Management Plan: change "See paragraph C.3.2" to "See paragraph L.6.2."

Systems Involved: Electric Natural Gas Water Wastewater Other

Originator W.Owens/J.Scott

Date 13-jun-00

Organization AFCESA

DSN Phone: 523-6523

AFCESA Wolf

Commercial 850-283-6523

LLRC 3/15/02: LLRC Approved - ERRATA Sheet Item.

AF UP Lessons Learned - # AFCESA00078

Title: Service Charge Adjustment

Designator: Pathfinder

Impact AF-RFP Template

Submitted AFCESA

Base All

Category General

Lesson Approved

Sub-Category PH3-RFP Issue

Issue/Concern:

Clarification on parties request to re-negotiate the Monthly Service Charge

Recommendation:

Paragraph G-3: In the first paragraph, second sentence, reword "This subparagraph applies to the Schedule L-1 components of Sub-CLINs AB included in the Offeror's proposal only."

Systems Involved: Electric Natural Gas Water Wastewater Other

Originator W.Owens/J.Scott

Date 13-jun-00

Organization AFCESA

DSN Phone: 523-6523

AFCESA Wolf

Commercial 850-283-6523

LLRC 3/15/2002: LLRC Approved. ERRATA Sheet Item.

AF UP Lessons Learned - # AFCESA00079

Title: Special Contract Provisions- Catastrophic Loss

Designator: Pathfinder

Impact AF-RFP Template

Submitted AFCESA

Base All

Category General

Lesson Approved

Sub-Category PH3-RFP Issue

Issue/Concern:

Clarification of contractors coverage on catastrophic losses to the company

Recommendation:

Section H.3, Catastrophic Loss: Change first sentence to read, "The Contractor(s) shall propose in the Service Interruption/Contingency Plan (para. C.7) how it plans to protect itself from a catastrophic loss (for example, an earthquake) and/or personal injury due to negligence."

Systems Involved: Electric Natural Gas Water Wastewater Other

Originator W.Owens/J.Scott

Date 13-jun-00

Organization AFCESA

DSN Phone: 523-6523

AFCESA Wolf

Commercial 850-283-6523

LLRC 3/15/02: LLRC Approved. ERRATA Sheet Item.

AF UP Lessons Learned - # AFCESA00080

Title: Contract Clauses- FAR Clauses

Designator: Pathfinder

Impact AF-RFP Template

Submitted AFCESA

Base All

Category General

Lesson Approved

Sub-Category PH3-RFP Issue

Issue/Concern:

Correct Spelling

Recommendation:

Paragraph I.2: Change "recission" to "rescission."

Systems Involved: Electric Natural Gas Water Wastewater Other

Originator W.Owens/J.Scott

Date 13-jun-00

Organization AFCESA

DSN Phone: 523-6523

AFCESA Wolf

Commercial 850-283-6523

LLRC 3/15/02: LLRC Approved. ERRATA Sheet Item.

AF UP Lessons Learned - # AFCESA00081

Title: Contract Clauses- FAR Clauses

Designator: Pathfinder

Impact AF-RFP Template

Submitted AFCESA

Base All

Category General

Lesson Approved

Sub-Category PH3-RFP Issue

Issue/Concern:

Correct Spelling

Recommendation:

Paragraph I.2: Change "Hubzone" to "HUBZone."

Systems Involved: Electric Natural Gas Water Wastewater Other

Originator W.Owens/J.Scott

Date 13-jun-00

Organization AFCESA

DSN Phone: 523-6523

AFCESA Wolf

Commercial 850-283-6523

LLRC 3/15/02: LLRC Approved. ERRATA Sheet Item

AF UP Lessons Learned - # AFCESA00082

Title: AFFARS Clauses Incorporated by Reference

Designator: Pathfinder

Impact AF-RFP Template

Submitted AFCESA

Base All

Category General

Lesson Approved

Sub-Category PH3-RFP Issue

Issue/Concern:

Incorporate standard clause about Ozone Depleting Substances (ODS)

Recommendation:

Section I.4 AFFARS Clauses Incorporated by Reference: This section contains a list of Class 1 Ozone Depleting Substances (ODS) that is base-specific. Unless a base is privatizing a cooling plant and turning over all ODS material, this list is probably not needed. This section should have a user note to modify it as needed by adding the list. RFPs currently advertised contain this erroneous and confusing list. It is recommended that each contracting officer issue an immediate amendment removing I.4 and replacing it with the following:

Systems Involved: Electric Natural Gas Water Wastewater Other

Originator W.Owens/J.Scott

Date 13-jun-00

Organization AFCESA

DSN Phone: 523-6523

AFCESA Wolf

Commercial 850-283-6523

LLRC 3/15/02: LLRC Approved. ERRATA Sheet Item.

AF UP Lessons Learned - # AFCESA00083

Title: Regulated Utility Clauses Incorporated by Reference

Designator: Pathfinder

Impact AF-RFP Template

Submitted AFCESA

Base All

Category General

Lesson Approved

Sub-Category PH3-RFP Issue

Issue/Concern:

Clarification of Rates or Terms and Conditions of Service for Unregulated Services.

Recommendation:

Section I.6: Add 52.241-8 Change in Rates or Terms and Conditions of Service for Unregulated Services (IAW FAR 41.501[d][2]) Feb 1995. For the purposes of this clause the blank(s) is/are completed as follows: To be determined.

Systems Involved: Electric Natural Gas Water Wastewater Other

Originator W.Owens/J.Scott

Date 13-jun-00

Organization AFCESA

DSN Phone: 523-6523

AFCESA Wolf

Commercial 850-283-6523

LLRC 3/15/02: LLRC Approved. ERRATA Sheet Item.

AF UP Lessons Learned - # AFCESA00084

Title: Statement of Qualifications Submission

Designator: Pathfinder

Impact AF-RFP Template

Submitted AFCESA

Base All

Category General

Lesson Approved

Sub-Category PH3-RFP Issue

Issue/Concern:

Direction to the offeror on where to place SOQs.

Recommendation:

Schedule L-3: Add user note, "Do not put projects from Section J (deficiencies) in Schedule L-3). Leave this to bidders."

Systems Involved: Electric Natural Gas Water Wastewater Other

Originator W.Owens/J.Scott

Date 13-jun-00

Organization AFCESA

DSN Phone: 523-6187

AFCESA Wolf

Commercial 850-283-6187

LLRC 3/15/02: LLRC Approved. ERRATA Sheet Item.

AF UP Lessons Learned - # AFCESA00085

Title: Proposal Preparation Instructions Vol. I: Tech: Subfactor 2: Quality Management Plan

Designator: Pathfinder

Impact AF-RFP Template

Submitted AFCESA

Base All

Category General

Lesson Approved

Sub-Category PH3-RFP Issue

Issue/Concern:

Guidance to offerors on proposal instructions on naming Tables.

Recommendation:

Section L.6.2: Rename "Schedule C-1" to "Table L-1." Also, in the first bullet, Service Standards, rename "Schedule C-1" to "Table L-1."

Systems Involved: Electric Natural Gas Water Wastewater Other

Originator W.Owens/J.Scott

Date 13-jun-00

Organization AFCESA

DSN Phone: 523-6523

AFCESA Wolf

Commercial 850-283-6523

LLRC 3/15/02: LLRC Approved. ERRATA Sheet Item.

AF UP Lessons Learned - # AFCESA00086

Title: Proposal Preparation Instructions- Vol.IV: Price; Organization

Designator: Pathfinder

Impact AF-RFP Template

Submitted AFCESA

Base All

Category General

Lesson Approved

Sub-Category PH3-RFP Issue

Issue/Concern:

Instruction to offerors on preparation of Schedules

Recommendation:

Section L.9.5, second bullet: Change "Section 1: Schedules B-2, L-1, and L-3" to read "Section 1: Schedules B-2, L-1, L-2, and L-3"

Systems Involved: Electric Natural Gas Water Wastewater Other

Originator R.Wolf

Date 13-jun-00

Organization AFCESA

DSN Phone: 523-6187

AFCESA Wolf

Commercial 850-283-6187

LLRC 3/15/02: LLRC Approved. ERRATA Sheet Item.

AF UP Lessons Learned - # AFCESA00087

Title: Proposal Preparation Instructions- Vol. IV: Price; Instrucions

Designator: Pathfinder

Impact AF-RFP Template

Submitted AFCESA

Base All

Category General

Lesson Approved

Sub-Category PH3-RFP Issue

Issue/Concern:

Instructions on Capital Upgrades and Recoverable Portion of the Purchase Price

Recommendation:

Section L.9.6, Detailed Instructions for Price Proposals, Capital Upgrades and Recoverable Portion of the Purchase Price: change "Renewals and Renewals" to "Renewals and Replacements" in two places.

Systems Involved: Electric Natural Gas Water Wastewater Other

Originator W.Owens/J.Scott

Date 13-jun-00

Organization AFCESA

DSN Phone: 523-6187

AFCESA Wolf

Commercial 850-283-6187

LLRC 3/15/02: LLRC Approved. ERRATA Sheet Item.

AF UP Lessons Learned - # AFCESA00088

Title: Proposal Preparation Instructions- Vol. IV: Price Proposal Section 2

Designator: Pathfinder

Impact AF-RFP Template

Submitted AFCESA

Base All

Category General

Lesson Approved

Sub-Category PH3-RFP Issue

Issue/Concern:

Offeror instruction on placement of the financial data

Recommendation:

Section L.9.6, Section 1 - Schedule B-2: replace existing sentence with, "Include a completed copy of the RFP Schedule B-2 for each utility system included in the proposal."

Systems Involved: Electric Natural Gas Water Wastewater Other

Originator W.Owens/J.Scott

Date 13-jun-00

Organization AFCESA

DSN Phone: 523-6187

AFCESA Wolf

Commercial 850-283-6187

LLRC 3/15/02: LLRC ERRATA Sheet Item.

AF UP Lessons Learned - # AFCESA00089

Title: Proposal Preparation Instructions-

Designator: Pathfinder

Impact AF-RFP Template

Submitted AFCESA

Base All

Category General

Lesson Approved

Sub-Category PH3-RFP Issue

Issue/Concern:

Proposal financial data instructions

Recommendation:

Section L.9.6, Section 2 -- Cost Proposal, Introduction, and Pricing Assumptions: replace last sentence with "This information shall be provided in a separate Schedule L-1 for each utility system included in the proposal."

Systems Involved: Electric Natural Gas Water Wastewater Other

Originator W.Owens/J.Scott

Date 13-jun-00

Organization AFCESA

DSN Phone: 523-6187

AFCESA Wolf

Commercial 850-283-6187

LLRC 3/15/02: LLRC Approved. ERRATA Sheet Item.

AF UP Lessons Learned - # AFCESA00090

Title: Proposal Preparation Instructions - Vol. IV; Renewals & Replacements

Designator: Pathfinder

Impact AF-RFP Template

Submitted AFCESA

Base All

Category General

Lesson Approved

Sub-Category PH3-RFP Issue

Issue/Concern:

Instructions to the offerors on proposing financial data on Renewals & Replacements

Recommendation:

Section L.9.6, Renewals and Replacements: after "The 50-year schedule for renewals and replacements shall be established as shown in Schedule L-2. " Add sentence, "A separate Schedule L-2 shall be provided for each utility system included in the proposal."

Systems Involved: Electric Natural Gas Water Wastewater Other

Originator W.Owens/J.Scott

Date 13-jun-00

Organization AFCESA

DSN Phone: 523-6187

AFCESA Wolf

Commercial 850-283-6187

LLRC 3/15/2002: LLRC Approved. ERRATA Sheet Item.

AF UP Lessons Learned - # AFCESA00091

Title: Proposal Preparation Instructions - Vol. IV: Price;

Designator: Pathfinder

Impact AF-RFP Template

Submitted AFCESA

Base All

Category General

Lesson Approved

Sub-Category PH3-RFP Issue

Issue/Concern:

Proposal instructions to the offeror on preparing Capital Upgrades and Recoverable Portion of the Purchase Price

Recommendation:

Section L.9.6, Capital Upgrades and Recoverable Portion of the Purchase Price, add sentence as third paragraph, "A separate Schedule L-3 shall be provided for each utility system included in

Systems Involved: Electric Natural Gas Water Wastewater Other

Originator W.Owens/J.Scott

Date 13-jun-00

Organization AFCESA

DSN Phone: 523-6187

AFCESA Wolf

Commercial 850-283-6187

LLRC 3/15/02: LLRC Approved. ERRATA Sheet Item.

AF UP Lessons Learned - # AFCESA00092

Title: Proposal Preparation Instructions- Vol. IV- Price

Designator: Pathfinder

Impact AF-RFP Template

Submitted AFCESA

Base All

Category General

Lesson Approved

Sub-Category PH3-RFP Issue

Issue/Concern:

Clarification to offerors on variable monthly charges

Recommendation:

Paragraph L.9.6, Detailed Instructions for Price Proposal: delete "(i.e., variable monthly charges) from title.

Systems Involved: Electric Natural Gas Water Wastewater Other

Originator W.Owens/J.Scott

Date 13-jun-00

Organization AFCESA

DSN Phone: 523-6187

AFCESA Wolf

Commercial 850-283-6187

LLRC 3/15/02: LLRC Approved. ERRATA Sheet Item.

AF UP Lessons Learned - # AFCESA00093

Title: Evaluation Factors and Subfactors- Order of Importance

Designator: Pathfinder

Impact AF-RFP Template

Submitted AFCESA

Base All

Category General

Lesson Approved

Sub-Category PH3-RFP Issue

Issue/Concern:

Instructions to offerors on precedence of evaluation factors

Recommendation:

Paragraph M.4.1 Order of Importance for Evaluating Factors and Subfactors. Change the second sentence to read "Also, Price is equal to each of the factors when compared individually."

Systems Involved: Electric Natural Gas Water Wastewater Other

Originator W.Owens/J.Scott

Date 13-jun-00

Organization AFCESA

DSN Phone: 523-6523

AFCESA Wolf

Commercial 850-283-6523

LLRC

AF UP Lessons Learned - # AFCESA00094

Title: List of Attachments

Designator: Pathfinder

Impact AF-RFP Template

Submitted AFCESA

Base All

Category General

Lesson Approved

Sub-Category PH3-RFP Issue

Issue/Concern:

Government Recognized System Deficiencies

Recommendation:

Attachment J3/4, Section J.3/4.11, Government Recognized System Deficiencies: Change CLIN AC to CLIN AB.

Systems Involved: Electric Natural Gas Water Wastewater Other

Originator W.Owens/J.Scott

Date 13-jun-00

Organization AFCESA

DSN Phone: 523-6523

AFCESA Wolf

Commercial 850-283-6523

LLRC 3/15/2002: LLRC Approved. ERRATA Sheet Item.

AF UP Lessons Learned - # AFCESA00095

Title: List of Attachments - Right-of-Way, Exhibit B, Electric

Designator: Pathfinder

Impact AF-RFP Template

Submitted AFCESA

Base All

Category General

Lesson Approved

Sub-Category PH3-RFP Issue

Issue/Concern:

Instructions to offerors on Right-of-Way, Electric Distribution System rights-of Way.

Recommendation:

Attachment J41, Right-of-Way, Exhibit B, Electric Distribution System Rights-Of-Way: replace entire section with, "Where the utility is installed overhead, a 26-foot-wide right-ofway extending 13 feet on each side of the utility, as installed. Where the utility is installed underground, a 26-foot-wide right-of-way extending 13 feet on each side of the utility, as installed."

Systems Involved: Electric Natural Gas Water Wastewater Other

Originator W.Owens/J.Scott

Date 13-jun-00

Organization AFCESA

DSN Phone: 523-6523

AFCESA Wolf

Commercial 850-283-6523

LLRC 3/15/02: LLRC Approved. ERRATA Sheet Item.

AF UP Lessons Learned - # AFCESA00096

Title: List of Attachments- Right-of-Way; Exhibit B, Natural Gas

Designator: Pathfinder

Impact AF-RFP Template

Submitted AFCESA

Base All

Category General

Lesson Approved

Sub-Category PH3-RFP Issue

Issue/Concern:

Information for offerors on Right-of-Way, Natural Gas Distribution System.

Recommendation:

Attachment J41, Right-of-Way, Exhibit B, Natural Gas Distribution System Rights-Of-Way:
replace entire section with, "A 26-foot-wide right-of-way extending 13 feet on each side of the

Systems Involved: Electric Natural Gas Water Wastewater Other

Originator W.Owens/J.Scott

Date 13-jun-00

Organization AFCESA

DSN Phone: 523-6523

AFCESA Wolf

Commercial 850-283-6523

LLRC 3/15/02: LLRC Approved. ERRATA Sheet Item.

AF UP Lessons Learned - # AFCESA00097

Title: List of Attachments- Right-of-Way, Water Distribution System

Designator: Pathfinder

Impact AF-RFP Template

Submitted AFCESA

Base All

Category General

Lesson Approved

Sub-Category PH3-RFP Issue

Issue/Concern:

Information to offerors on attachment J41, Right-of-Way, Water Distribution System

Recommendation:

Attachment J41, Right-of-Way, Exhibit B, Water Distribution System Rights-Of-Way: replace entire section with "A 26-foot-wide right-of-way extending 13 feet on each side of the utility for pipe sizes of 24 inches and less and a 50-foot-wide right-of-way extending 25 feet on each side of the utility for pipe sizes of greater than 24 inches, as installed."

Systems Involved: Electric Natural Gas Water Wastewater Other

Originator W.Owens, J.Scott

Date 13-jun-00

Organization AFCESA

DSN Phone: 523-6523

AFCESA Wolf

Commercial 850-283-6523

LLRC 3/15/02: LLRC Approved. ERRATA Sheet Item.

AF UP Lessons Learned - # AFCESA00098

Title: List of Attachments- Right-of-Way, Wastewater Dist. Sys

Designator: Pathfinder

Impact AF-RFP Template

Submitted AFCESA

Base All

Category General

Lesson Approved

Sub-Category PH3-RFP Issue

Issue/Concern:

Information for offerors on preparation of the Right-of-Way, Wastewater Distribution System

Recommendation:

Attachment J41, Right-of-Way, Exhibit B, Wastewater Distribution System Rights-Of-Way: replace entire section with "A 26-foot-wide right-of-way extending 13 feet on each side of the utility for pipe sizes of 24 inches and less and a 50-foot-wide right-of-way extending 25 feet on each side of the utility for pipe sizes of greater than 24 inches, as installed."

Systems Involved: Electric Natural Gas Water Wastewater Other

Originator W.Owens/J.Scott

Date 13-jun-00

Organization AFCESA

DSN Phone: 523-6523

AFCESA Wolf

Commercial 850-283-6523

LLRC

AF UP Lessons Learned - # AFCESA00099

Title: Description of J41 Attachments-

Designator: Pathfinder

Impact AF-RFP Template

Submitted AFCESA

Base All

Category General

Lesson Approved

Sub-Category PH3-RFP Issue

Issue/Concern:

Provide clarification on J41 system description

Recommendation:

Attachment J41, Exhibit B, Description of Premises: Replace entire paragraph with "Reference paragraph J.X.1.1 for system description."

Systems Involved: Electric Natural Gas Water Wastewater Other

Originator W.Owens/J.Scott

Date 13-jun-00

Organization AFCESA

DSN Phone: 523-6523

AFCESA Wolf

Commercial 850-283-6523

LLRC 3/15/02: LLRC Approved. ERRATA Sheet Item.

AF UP Lessons Learned - # AFCESA00100

Title: Wastewater Point of Demarcation Clarification- J41 Attachments

Designator: Pathfinder

Impact AF-RFP Template

Submitted AFCESA

Base All

Category General

Lesson Approved

Sub-Category PH3-RFP Issue

Issue/Concern:

Update the RFP Template to include clarification for offerors on the Wastewater Utility System Points of Demarcation

Recommendation:

Attachment J.41, Exhibit B, Wastewater Utility System Points of Demarcation, second diagram: Ensure point of demarcation points to the inlet side of the cleanout.

Systems Involved: Electric Natural Gas Water Wastewater Other

Originator W.Owens/J.Scott

Date 13-jun-00

Organization AFCESA

DSN Phone: 523-6523

AFCESA Wolf

Commercial 850-283-6523

LLRC 3/15/02: LLRC Approved. ERRATA Sheet Item.

AF UP Lessons Learned - # AFCESA00101

Title: Water-oil separators Point of Demarcation Clarification- J41 Attachments

Designator: Pathfinder

Impact AF-RFP Template

Submitted AFCESA

Base All

Category General

Lesson Approved

Sub-Category PH3-RFP Issue

Issue/Concern:

RFP Template clarification on point of demarcation for water-oil separators

Recommendation:

Revision to AFCESA00054: Change reference from Section I.6 to Section I.5.

Systems Involved: Electric Natural Gas Water Wastewater Other

Originator R.Wolf

Date 08-jan-01

Organization AFCESA

DSN Phone: 523-6187

AFCESA Wolf

Commercial 850-283-6187

LLRC 3/15/02: LLRC Approved. ERRATA Sheet Item.

AF UP Lessons Learned - # AFCESA00102

Title: Regulated & Non-Regulated utility Clauses Incorporated

Designator: Pathfinder

Impact AF-RFP Template

Submitted AFCESA

Base All

Category General

Lesson Approved

Sub-Category PH3-RFP Issue

Issue/Concern:

Correction and editing of Instructions to Offerors section on Regulated and Non-Regulated Utility Clauses by Reference.

Recommendation:

Revision to AFCESA00054: Change reference from Section I.6 to Section I.5.

Systems Involved: Electric Natural Gas Water Wastewater Other

Originator R.Wolf

Date 08-jan-01

Organization AFCESA

DSN Phone: 523-6187

AFCESA Wolf

Commercial 850-283-6187

LLRC 3/15/02: LLRC Approved. ERRATA Sheet Item.

AF UP Lessons Learned - # AFCESA00103

Title: Proposal Preparation Instructions

Designator: Pathfinder

Impact AF-RFP Template

Submitted AFCESA

Base All

Category General

Lesson Approved

Sub-Category PH3-RFP Issue

Issue/Concern:

Clarification of variable monthly charges in RFP Section L

Recommendation:

Revision to AFCESA00092: Should read "Delete (i.e., variable monthly charges) from title of Schedule L-3.

Systems Involved: Electric Natural Gas Water Wastewater Other

Originator R.Wolf

Date 08-jan-01

Organization AFCESA

DSN Phone: 523-6187

AFCESA Wolf

Commercial 850-283-6187

LLRC 3/15/02: LLRC Approved. ERRATA Sheet Item.

AF UP Lessons Learned - # AFCESA00104

Title: Clarification to J41 Attachment, Exhibit B

Designator: Pathfinder

Impact AF-RFP Template

Submitted AFCESA

Base All

Category General

Lesson Approved

Sub-Category PH3-RFP Issue

Issue/Concern:

Correction to previous AFCESA00099.

Recommendation:

Revision to AFCESA00099: Should read: "Attachment J41, Exhibit B - XXX AFB [Utility] System, Description of Premises." Replace entire paragraph under [Utility] System Description with, "Reference paragraph JX.2.1.1 for system description."

Systems Involved: Electric Natural Gas Water Wastewater Other

Originator R.Wolf

Date 08-jan-01

Organization AFCESA

DSN Phone: 523-6187

AFCESA Wolf

Commercial 850-283-6187

LLRC 3/15/02: LLRC Approved. ERRATA Sheet Item.

AF UP Lessons Learned - # AFCESA00106

Title: Direct MAJCOM Support

Designator: Pathfinder

Impact AF Wide

Submitted AFCESA

Base TRD

Category General

Lesson Disapproved

Sub-Category Other

Issue/Concern:

Firm MAJCOM and Air Staff support (sponsorship) for high-level downward-directed programs such as the Utilities Privatization program must have full support at the MAJCOMs. Many opportunities for forward movement into the next phase were hampered/deterred/delayed by some Bases intrusion of their initiatives that were contrary to P&G.

Recommendation:

Strong, positive support for the initiative from MAJCOM (at the beginning).

Systems Involved: Electric Natural Gas Water Wastewater Other

Originator Wolf

Date 03-may-02

Organization HQ AFCESA/CEOC

DSN Phone: 523-6187

AFCESA Patterson

Commercial 850-283-6187

LLRC 20 Feb 02: LLRC decided to disapprove because it could not find anything substantitive to the process.

AF UP Lessons Learned - # AFCESA00107

Title: Schedule B-1 Utility Service Payment by the Government

Designator: Pathfinder

Impact AF-RFP Template

Submitted AFCESA

Base TRD

Category Contracting

Lesson Approved

Sub-Category PH3-RFP Issue

Issue/Concern:

The current schedule B-1 (Utility Service Payment by the Government) does not provide enough information. In the current RFP page B-3 and B-4: Schedule B-2 "Utility Service Payment by the Government is changed to Schedule B-1" Utility Service Payment by the Government. This amendment corrected and clarified sections throughout the RFP; many were the result of

Recommendation:

Make the following change to the solicitation: Supplies or Services and Prices/Costs

1. Page B-4 and B-5 Replace Schedule B-1.

Systems Involved: Electric Natural Gas Water Wastewater Other

Originator L. Richardson

Date 12-feb-02

Organization HQ AFCESA

DSN Phone: 523-6187

AFCESA Wolf

Commercial 850-283-6523

LLRC 12 Feb 02: LLRC approved. Errata Sheet Item.

POC: B. Smeltzer
Due: 31 May 02

AF UP Lessons Learned - # AFCESA00108

Title: UP Project Summary Report

Designator: Pathfinder

Impact AF Wide

Submitted AFCESA

Base TRD

Category Contracting

Lesson Disapproved

Sub-Category PH2-DCAR

Issue/Concern:

The Utilities Privatization Policy & Guidance (P&G) requires a Project Summary Report as part of the Approval Package and provides an outline showing the proposed contents of this report. The P&G also states it is the Government's responsibility to produce this report, so it was not included in the A/E's SOWs.

Recommendation:

Systems Involved: Electric Natural Gas Water Wastewater Other

Originator D. Patterson

Date 07-dec-02

Organization HQ AFCESA

DSN Phone: 523-6443

AFCESA Patterson

Commercial 850-283-6443

LLRC

20 Feb 02: LLRC Disapproved. The format and contents are currently given in the Policy and Guidance Manual, Appendix E.

AF UP Lessons Learned - # AFCESA00109

Title: Proposers Sign Right-Of-Way Document

Designator: Pathfinder

Impact AF-RFP Template

Submitted AFCESA

Base Dobbins

Category Contracting

Lesson Approved

Sub-Category PH3-RFP Issue

Issue/Concern:

Schedule delays are possible if the selected contractor (proposer) has not signed the Right-Of-Way (ROW) document at the time proposals are first submitted for evaluation. The signed ROW is required for the AF/ILEXO package that will go to Congress.

Recommendation:

Revise the RFP to require the proposers submit signed ROWs with their first proposal. The following statement must be added to the RFP:

"In order for offerors proposals to be responsive to the Government solicitation, they must include with their proposal a signed ROW document".

Systems Involved: Electric Natural Gas Water Wastewater Other

Originator G. Onorato

Date 03-may-02

Organization HQ AFCESA

DSN Phone: 523-6374

AFCESA Onorato

Commercial 850-283-6374

LLRC 3 May 02: LLRC approved.

POC: Smeltzer
Area: RFP
Due: 31 May 02

AF UP Lessons Learned - # AFCESA00110

Title: Phase III GCE Quality Control Check #1

Designator: Pathfinder

Impact Unknown

Submitted AFCESA

Base Jacksonville

Category Technical

Lesson Approved

Sub-Category PH3-CEA

Issue/Concern:

The AFCESA A-E contractor must submit the Phase II Updated Cost Analysis GCE model, CEA model, and GCE Supporting Data to AFCESA/CES for review and approval prior to RFP release.

Recommendation:

Verify that this requirement is in the Phase III AFCESA A-E Statement of Work.

Systems Involved: Electric Natural Gas Water Wastewater Other

Originator E. Page

Date 03-may-02

Organization HQ AFCESA

DSN Phone: 523-6345

AFCESA Other

Commercial 523-634-5

LLRC 3 May 02: LLRC Approved.

POC: M. Young
Area: SOW
Due: ?

AF UP Lessons Learned - # AFCESA00111

Title: Phase III Life Cycle Benefits Template

Designator: Pathfinder

Impact Unknown

Submitted AFCESA

Base TRD

Category Finance

Lesson Approved

Sub-Category PH3-GCE

Issue/Concern:

In the Certified Economics Analyses submitted for review to date, Section 8, Life-Cycle Benefits Analysis, have been too generic and did not show the advantages and disadvantages of the specific proposals. The base and MAJCOM reviewers believe it would facilitate their reviews if this section addressed the advantages and disadvantages specific to the proposals.

Recommendation:

Two of the A-E contractors are revising their respective Section 8s to include the specific Strengths and Weaknesses of the subject proposal from the SSET Summary Report. Other sources for this information may be the SSA Decision Memo and Project Summary Report. From these two Section 8s, a template will be developed for the two subsections of the Life-Cycle Benefits Analysis portion of the Certified EA. This template can then be used for the

Systems Involved: Electric Natural Gas Water Wastewater Other

Originator R. Wolf

Date 03-may-02

Organization HQ AFCESA

DSN Phone: 523-6187

AFCESA Wolf

Commercial 850-283-6187

LLRC

3 May 02: LLRC tabled. PM was unavailable to answer questions.

20 May 02: LLRC approved. This LL was initiated to help the Base and MAJCOM with a quick summary of the Strengths & Weaknesses in the CEA of the selected offeror. The A-E fills out.

POC: R. Wolf
Area: PM Notebook, SOW
Date:

AF UP Lessons Learned - # AFCESA00112

Title: Sending Approval Package to AF/ILEXO

Designator: Pathfinder

Impact Unknown

Submitted AFCESA

Base TRD

Category Contracting

Lesson Approved

Sub-Category Other

Issue/Concern:

Unless instructed otherwise, the SSA would probably want to send the UP approval package Col to Col. In other words, he or his staff would want to send the package to Col Byers, HQ USAF/ILEX. This will violate the Source Selection Sensitivity of the approval package, since Col Byers has probably not signed a Non-Disclosure form for your particular Source Selection.

Recommendation:

To avoid the Source Selection Sensitivity issue, address the approval package memorandum as follows:

MEMORANDUM TO HQ USAF/ILEXO
Attn: Mr. Ken Miller

[CO/PM- will need to explain this point to the SSA and convince him/her to address the

Systems Involved: Electric Natural Gas Water Wastewater Other

Originator R. Wolf

Date 03-may-02

Organization HQ AFCESA

DSN Phone: 523-6187

AFCESA Wolf

Commercial 850-283-6187

LLRC

3 May 02: LLRC tabled. PM unavailable to answer questions.
Comment: PM consider rewrite to include competition sensitive blanket disclosure for ILEXO.

14 May 02 - LLRC approved. The recommendation to send to the named person was an ILEXO decision. Blanket approval for receipt of the package was considered also.

POC: R.Wolf
Area: PM Handbook, {P&G}

AF UP Lessons Learned - # AFCESA00113

Title: Utility System and Areal Descriptions

Designator: Pathfinder

Impact: Unknown

Submitted: AFCESA

Base: TRD

Category: Technical

Lesson: Approved

Sub-Category: Other

Issue/Concern:

When preparing Areal Descriptions, the Areal Description manager includes a utility system description for background information. When AFCESA sent the Areal Descriptions for TRD to our A/E for insertion into Exhibit B of the Right-of-Way documents, he reported that the system description did not match the one included in the RFP J Attachment. In this case, the Areal Description system description had been extracted from the Final Feasibility Analysis Report. This was PM oversight. This was due to miscommunication to the Areal Description manager on which version to use (i.e., the RFP version has probably been updated since the FAR was produced). If a system description is included as background information for the Areal Description, it must be the same version as the one in the RFP that the offeror proposed on.

Recommendation:

If a utility system description is included in the Areal Description document, the PM must ensure that the version used was extracted from the RFP. A good rule of thumb may be, if you know you will require an Areal Description in the near future, provide the RFP system description to the Areal Description manager [AFCESA- Mr. Robert Sitten].

[Exhibit B - ROW] "The utility system description contained in the RFP shall be updated to include any changes to the system that occurred since the RFP was issued. The utility system description and Areal Extent contained in Exhibit B must be current as of the date of contract award."

Systems Involved: Electric Natural Gas Water Wastewater Other

Originator: R. Wolf

Date: 03-may-02

Organization: HQ AFCESA

DSN Phone: 523-6187

AFCESA: Wolf

Commercial: 850-283-6187

LLRC

3 May 02: LLRC tabled. PM unavailable to answer questions.

*Randy & Ed page need to discuss. E. Page wants to Review the inventory again here. D. Voight suggested a potential schedule change for delivery of the Areal Descriptions.

14 May 02: LLRC decided to approve this LL; need to make sure documents are consistent and latest version. This is a handbook item.

POC: B. Sitten, Smeltzer, R. Wolf, D. Voight
Area: RFP, Schedule, and SOW, {handbook}
Comp'l Date:

AF UP Lessons Learned - # AFCESA00114

Title: Schedule B-2 Transition Clin

Designator: Pathfinder

Impact AF Wide

Submitted AFCESA

Base Maxwell/Gunter

Category Contracting

Lesson Under Review

Sub-Category PH3-RFP Issue

Issue/Concern:

Schedule B-2 in the current RFP template does not have a CLIN for the new owner to recover their transition costs during the transition period. Respondents to the RFP were including these transition costs as capital improvements in their proposals. Given this approach, the new owner cannot recoup his costs until the transition process is complete. With the additional CLIN, the offeror can recoup his costs on a monthly basis until the transition period is complete.

Recommendation:

In order for the new owner to recover their costs as transition occurs, recommend an additional CLIN to Schedule B-2 of the RFP. Amendment 26 to the Maxwell Gunter Solicitation can be referenced proposed language changes to the various sections of the RFP.

Systems Involved: Electric Natural Gas Water Wastewater Other

Originator D. Voight

Date 24-may-02

Organization HQ AFCESA

DSN Phone: 523-6531

AFCESA Smeltzer

Commercial 850-283-6531

LLRC LLRC - 5/14/02. LLRC placed under review. Brent asked for more time to review.

LLRC 14 May 02 - LLRC decided to
POC: D. Voight
AREA: (SOW,{RFP}, P&G, Schedule)
COMPLETION DATE:

AF UP Lessons Learned - # AFCESA00115

Title: Congressional Notification Package

Designator: Pathfinder

Impact AF-P&G

Submitted AFCESA

Base Dobbins

Category General

Lesson Under Review

Sub-Category Other

Issue/Concern:

E-mail from ILEXO, Mr. Ken Miller, dated 18 April 02, 10:34 a.m., subject: approval flowchart simplified; 29 April 02, 1:02p.m., subject: Snowflake, IEI approval process; and 6 May 02, 1:08 pm, subject: current template for packages (approval)changes the P&G appendix E suggested contents of an award/approval/notification package. The e-mails reduce the requirements to a SSS and four tabs and indicate the process the packages go through from receipt at Air Staff to signed memo back to the SSA/MAJCOM/Base for award of contract. The tabs are: 1) The congressional authorizers notification of intended award, 2) the congressional appropriators notification of intended award, 3) the CEA for each system involved 4) copy of 10 USC 2688.

Recommendation:

Changed appendix E to reflect the congressional notification packages content as a SSS and four tabs and include the flowchart.

Systems Involved: Electric Natural Gas Water Wastewater Other

Originator K. Miller

Date 05-jun-02

Organization AF/ILEXO

DSN Phone: 664-4304

AFCESA Patterson

Commercial 703-604-4304

LLRC

LLRC - LLRC decided to
POC: D. Patterson
AREA: (SOW,RFP, {P&G}, Schedule)
COMPLETION DATE:

AF UP Lessons Learned - # AFCESA00116

Title: Incorporate 9/99 & 12/00 AF P&G Manual Clarifications

Designator: Pathfinder

Impact AF-P&G

Submitted AFCESA

Base All

Category General

Lesson Under Review

Sub-Category Other

Issue/Concern:

The recommended changes to the next AF Policy and Guidance Manual as delineated in the 9/99 and 12/00 clarifications from Air Staff need to be added to the next P&G Revision.

Recommendation:

Incorporate changes into the June 2002 P&G Manual Revision

Systems Involved: Electric Natural Gas Water Wastewater Other

Originator Josh Scott

Date 05-jun-02

Organization HQ AFCESA

DSN Phone: 523-6523

AFCESA Scott

Commercial 850-283-6523

LLRC

LLRC - LLRC decided to
POC: J.Scott
AREA: (SOW,RFP, {P&G}, Schedule)
COMPLETION DATE:

AF UP Lessons Learned - # AFCESA00117

Title: Due Diligence Visits should be Limited to Plant Visits

Designator: Pathfinder

Impact AF-RFP Template

Submitted AFCESA

Base Maxwell/Gunter

Category Contracting

Lesson Disapproved

Sub-Category PH3-Site Visit

Issue/Concern:

The Technical and Past Performance teams did not gain any value from performing due diligence visits (on-site) with the offeror's previous/current customers. Members from these teams felt that their ratings would not have changed if the due diligence work had been conducted over the phone. The site visits to the offeror's plants (office buildings, warehouses, construction sites, engineering facilities, etc.) did have value to the Tech. Team as well as the PCO.

Recommendation:

Remove the requirement to perform due diligence visits (on-site) with the offeror's previous/current customers. Plant Visits should remain a part of the source selection process.

Systems Involved: Electric Natural Gas Water Wastewater Other

Originator D. Voight

Date 05-jun-02

Organization HQ AFCESA

DSN Phone: 523-6521

AFCESA N/A

Commercial 850-283-6521

LLRC

LLRC - 5/14/02. The LLRC decided to disapprove this LL because the MAJCOM makes the decisions of accomplishing and funding due diligence.

LLRC 14 May 02 - LLRC decided to
POC: D. Voight
AREA: (SOW,RFP, P&G, Schedule)

AF UP Lessons Learned - # AFCESA00118

Title: Industry Forum Announcements

Designator: Pathfinder

Impact: Unknown

Submitted: AFCESA

Base: Maxwell/Gunter

Category: General

Lesson: Approved

Sub-Category: Other

Issue/Concern:

For any upcoming high level meetings with Industry, there may be some merit to the Air Force announcing upcoming RFPs. The intent is to increase interest in these solicitations. The projected RFP release dates could be presented, the SOW, and any other materials that might spark interest with potential bidders.

Recommendation:

Announce upcoming RFPs at Industry Forums

Systems Involved: Electric Natural Gas Water Wastewater Other

Originator: D. Voight

Date: 05-jun-02

Organization: HQ AFCESA

DSN Phone: 523-6521

AFCESA: D. Voight

Commercial: 850-283-6521

LLRC

5/14/02 LLRC- decided to approve this LL. Marketing the UP program at industry forms would help keep industry appraised on the status of the program.

LLRC 14 May 02 - LLRC decided to approve this LL.
POC: D. Voight
AREA: (SOW,RFP, P&G, Schedule, {handbook})

AF UP Lessons Learned - # AFCESA00119

Title: Oral Presentations as a part of the initial proposals

Designator: Pathfinder

Impact Unknown

Submitted AFCESA

Base Maxwell/Gunter

Category General

Lesson Approved

Sub-Category Other

Issue/Concern:

The Oral Presentations provided as a part of the initial proposals for the Max/Gun solicitation did not have any real value. These presentations were used as a dog and pony show by the offerors and the material presented was of no value to the members of the SSET. It is now known that this requirement adds unnecessary time to the source selection process.

Recommendation:

Remove oral presentations from the source selection process

Systems Involved: Electric Natural Gas Water Wastewater Other

Originator D. Voight

Date 05-jun-02

Organization HQ AFCESA

DSN Phone: 523-6521

AFCESA D. Voight

Commercial 850-283-6521

LLRC 14 May 02 LLRC decided to approve this LL. It is good marketing to industry on the status of UP.

LLRC 14 May 02 - LLRC decided to approve this LL.
POC: B.Smeltzer
AREA: (SOW,{RFP}, P&G, Schedule)
COMPLETION DATE: 31 May 02

AF UP Lessons Learned - # AFCESA00120

Title: Environmental Baseline Survey Update

Designator: Non-Pathfinder

Impact AF-P&G

Submitted AFCESA

Base All

Category Technical

Lesson Under Review

Sub-Category PH3-Transition

Issue/Concern:

Two disconnects exist between the Right-of-Way and the P&G. 1) It is not clear who pays for the EBS after award, and 2) who pays for the EBS at termination of the ROW.

Recommendation:

Recommend corrections to the P&G to show the Grantee as the payor for the EBS after award; and, the Grantee and owner will share in development and cost of the EBS at ROW termination. RECOMMEND CHANGING THE P&G TO READ:

Environmental Baseline Survey

An EBS may be necessary in the case of some utility system sales. The level of analysis will be determined on a case-by-case basis depending on the specific circumstances of the privatization action. Generally, a privatization action that only results in the sale of the system with a right-of-way (i.e., no land is sold) will not require an EBS. Nevertheless, in some circumstances it may still be desirable to conduct an EBS to establish the condition of the land surrounding the utility system. This is most likely to occur in the case of the sale of a wastewater system that includes a treatment plant. If the Grantor (AF) determines that an EBS is required, the Grantee (owner) will prepare the EBS in accordance with the Grantor's standards and requirements. Costs for this EBS will be born by the Grantor. The EBS will be performed with the successful offeror after the award. If such an EBS is required and prepared, upon expiration, termination, or abandonment of the Right-of-Way, Grantee will prepare another EBS, in accordance with Grantor's standards and requirements, which will document the environmental condition of the property at the end of Grantee's use of the premises. The Parties will share equally the cost of that EBS.

Systems Involved: Electric Natural Gas Water Wastewater Other

Originator J. Scott

Date 10-jun-02

Organization HQ AFCESA

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AFCESA Scott

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LLRC

AF UP Lessons Learned - # ANG00001

Title: Data Collection and Documentation

Designator: DESC Streamlined

Impact AF Wide

Submitted ANG

Base All ANG

Category General

Lesson Approved

Sub-Category PH3-Site Visit

Issue/Concern:

The accuracy of the base's Autocad drawings and/or Real Property report 7115 cannot be relied upon during inventories.

Recommendation:

Need to use a combination of Autocad drawings, Real Property Report 7115, word of mouth, and hands-on inventory to determine the most accurate picture of the bases utility systems. Once your inventory is complete, send it to the BCE for verification. Once verified, review the BCEs Real Property Report 7115 and send him the recommended changes.

Reference: See Lesson #AFCESA00005 for additional information and cross-referencing.

Systems Involved: Electric Natural Gas Water Wastewater Other

Originator R. Pearson

Date 10-may-01

Organization DESC/APP

DSN Phone: 427-8434

AFCESA Smeltzer

Commercial 703-767-8434

LLRC

30 May 01 - LLRC approved lesson and stressed that this process will be important for non-pathfinders to follow and provide necessary feedback to the BCE.

10 Jul 01 - Re-written by ANG to include #ANG00010 and cross-referenced with #AFCESA00005.

AF UP Lessons Learned - # ANG00002

Title: Helping Bases Become More "Pro" Privatization

Designator: DESC Streamlined

Impact AF Wide

Submitted ANG

Base All ANG

Category General

Lesson Approved

Sub-Category Other

Issue/Concern:

Funding of utilities privatization and the responsiveness of selected contractors are two major BCE concerns.

Recommendation:

Advise BCEs up front that costs associated with the privatization study including the TDYs, the training, and the contract itself (once its awarded) will be born by the MAJCOM. Additionally, since there are many bases where systems are already privatized (an many happy BCEs), provide BCEs of non-privatized bases with the appropriate names and phone numbers so they can talk to other BCEs and find out how well privatization actually works.

Systems Involved: Electric Natural Gas Water Wastewater Other

Originator R. Pearson

Date 10-may-01

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LLRC

30 May 01 - LLRC decided this lesson needed to be re-written by providing examples of privatized bases and include more information.

11 Jul 01 - Rewritten by ANG to include #ANG00011 and approved.

AF UP Lessons Learned - # ANG00003

Title: Site Utility Maps

Designator: DESC Streamlined

Impact MAJCOM Only

Submitted ANG

Base All

Category General

Lesson Approved

Sub-Category PH3-Site Visit

Issue/Concern:

Focusing the BCE's attention on the privatization process and what's being privatized at his base.

Recommendation:

Our inventory teams produce single line drawings of each utility system and color-code them to show what's owned by the base and what's owned by the utility company. These drawings are then signed by the BCE and mailed to the ANGRC. By doing this, we ensure the BCE is aware what's being privatized, call the BCE's attention to the privatization process, demonstrate for the BCE the accuracy/inaccuracy of his records, and increase the helpfulness (support) of his

Systems Involved: Electric Natural Gas Water Wastewater Other

Originator R. Pearson

Date 10-may-01

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LLRC 30 May 01 - LLRC approved lesson and considering implementing AF

AF UP Lessons Learned - # ANG00004

Title: RFP Complexity

Designator: DESC Streamlined

Impact MAJCOM Only

Submitted ANG

Base All ANG

Category Contracting

Lesson Approved

Sub-Category PH3-RFP Issue

Issue/Concern:

Current RFPs are far too complicated for our "small" ANG utility systems. Offerors are unlikely to submit bid packages that cost them 100 - 200 K to produce when the utility system they're interested in is so small it won't produce much revenue for them.

Recommendation:

Although stressing the use of "alternate proposals" makes the evaluation phases of the contracting process much more difficult, it's one way of enticing prospective bidders.

Reference: See Lesson #AFCESA00007 and #ANG00008 for additional information and cross-referencing.

Systems Involved: Electric Natural Gas Water Wastewater Other

Originator R. Pearson

Date 10-may-01

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LLRC

30 May 01 - LLRC decided to table this lesson until OSD direction is received that permits further simplification of the RFP.

24 Aug 01 - LLRC decided to approve this lesson and cross-reference it with #AFCESA00007 even though its overcome by events for the ANG

AF UP Lessons Learned - # ANG00005

Title: Government Cost Model

Designator: DESC Streamlined

Impact MAJCOM Only

Submitted ANG

Base All ANG

Category Finance

Lesson Approved

Sub-Category PH3-GCE

Issue/Concern:

Unless we home in on an "approved" cost model, we'll soon be experiencing ANG program

Recommendation:

The solution is not to stop making "necessary" changes to the cost model but to bless each individual change as it occurs so we always have an "approved" and "current" cost model. Then, once we reach the "proposal due date," we can use the most current (approved) cost model and proceed without skipping a beat.

Systems Involved: Electric Natural Gas Water Wastewater Other

Originator R. Pearson

Date 10-may-01

Organization DESC/APP

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LLRC

30 May 01 - LLRC decided to table this lesson to USAF/ILEX for further action.

24 Aug 01 - LLRC decided to approve this lesson due to the fact that the

AF UP Lessons Learned - # ANG00006

Title: Pricing Database

Designator: DESC Streamlined

Impact MAJCOM Only

Submitted ANG

Base All ANG

Category General

Lesson Disapproved

Sub-Category PH3-Site Visit

Issue/Concern:

Accurate inventories and GCEs.

Recommendation:

Inventory teams collect their data based on the descriptions required by the pricing database. Each time the pricing database changes, we must immediately advise the inventory teams so they're aware of the "new" information (age, size, voltage, etc, etc) they need to collect.

Systems Involved: Electric Natural Gas Water Wastewater Other

Originator R. Pearson

Date 10-may-01

Organization DESC/APP

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LLRC 30 May 01 - LLRC disapproved lesson.

AF UP Lessons Learned - # ANG00007

Title: ANG Lease Considerations

Designator: DESC Streamlined

Impact MAJCOM Only

Submitted ANG

Base All ANG

Category Real Estate

Lesson Approved

Sub-Category Other

Issue/Concern:

Many ANG installations are located on leased property and each lease is unique. Some leases say the facilities, systems, and improvements are not Air Force owned property. Some leases include clauses covering utility system ownership and/or operations and maintenance. Some leases even specifically preclude ownership transfers or establish exclusive rights or rights of

Recommendation:

The lesson learned here is that each ANG installation is unique and each lease must be individually and thoroughly analyzed for privatization potential.

Systems Involved: Electric Natural Gas Water Wastewater Other

Originator R. Pearson

Date 10-may-01

Organization DESC/APP

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Commercial 703-767-8434

LLRC 30 May 01 - LLRC decided to table this lesson until next meeting.

24 Aug 01 - LLRC decided to approve this lesson as submitted.

AF UP Lessons Learned - # ANG00008

Title: Direct Negotiation with Current Owners/Providers

Designator: DESC Streamlined **Impact** MAJCOM Only **Submitted** ANG

Base All ANG **Category** Contracting

Lesson Approved **Sub-Category** PH3-Negotiation

Issue/Concern:

The ultimate success or failure of our privatization efforts is tied directly to the complexity of the process. The greater the complexity, the higher the failure rate. The competitive procurement process (which is directed by law) carries with it many highly complex contracting procedures. These complex procedures may, in many ANG cases, preclude privatization.

Recommendation:

Direct solicitation of current providers and/or land owners may result in more successful privatization efforts. Many times current providers and/or land owners choose not to compete because of complex contracting procedures which cost considerable time and money. If direct negotiation were possible, more privatization may result.

Reference: See Lesson #ANG00004 for additional information and cross-referencing.

Systems Involved: Electric Natural Gas Water Wastewater Other

Originator R. Pearson **Date** 10-may-01

Organization DESC/APP **DSN Phone:** 427-8434

AFCESA Smeltzer **Commercial** 703-767-8434

LLRC 30 May 01 - LLRC decided lesson recommendation needed to be re-written.

24 Aug 01 - LLRC decided to approve lesson based on re-write and

AF UP Lessons Learned - # ANG00009

Title: Base Assistance

Designator: DESC Streamlined

Impact MAJCOM Only

Submitted ANG

Base All ANG

Category General

Lesson Approved

Sub-Category Other

Issue/Concern:

Because there is limited unit manning at ANG installations, bases simply don't have the time to stay on top of what's happening with their Utilities Privatization effort.

Recommendation:

Frequent e-mails and/or phone calls keep them abreast of every step of their base's privatization process. On a periodic basis, let them know what's happened and what's to come.

Systems Involved: Electric Natural Gas Water Wastewater Other

Originator R. Pearson

Date 10-may-01

Organization DESC/APP

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LLRC 30 May 01 - LLRC decided to approve lesson after re-write.

2 Jul 01 - Approved by the LLRC.

AF UP Lessons Learned - # ANG00010

Title: Data Collection During Inventories

Designator: DESC Streamlined

Impact AF Wide

Submitted ANG

Base All ANG

Category Real Estate

Lesson Disapproved

Sub-Category PH3-Site Visit

Issue/Concern:

Much of the inventory data collected was obtained from records such as the Real Property Report 7115, old construction plans, DUERS, lease documents, base master plans, and Autocad drawings. Another valuable source of data was the collective memories of the technicians, facility managers, real property officers and BCEs. Continuity is an advantage ANG bases sometimes have over active duty bases. In some cases, people have spent their entire military careers at the same base and have a "personal memory" of dates, types of material, etc, etc.

Recommendation:

The inventory team was successful by not simply relying on documented data, but by combining documented data with the information gained through contacts with knowledgeable base

Systems Involved: Electric Natural Gas Water Wastewater Other

Originator R. Pearson

Date 10-may-01

Organization DESC/APP

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LLRC 30 May 01 - LLRC decided to combine this lesson with #ANG00001.

AF UP Lessons Learned - # ANG00011

Title: Funding of Privatized Systems

Designator: DESC Streamlined

Impact MAJCOM Only

Submitted ANG

Base All

Category Finance

Lesson Disapproved

Sub-Category Other

Issue/Concern:

One of the major concerns at ANG bases is who's paying for the study, the TDYs, and the contract once it's let. These funding concerns often resulted in mistrust and skepticism about

Recommendation:

Recommend advising bases up front that the studies and TDYs are centrally funded and that the State will not be picking up an increased tab once the contract is let.

Systems Involved: Electric Natural Gas Water Wastewater Other

Originator R. Pearson

Date 10-may-01

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LLRC 30 May 01 - LLRC decided to combine this lesson with #ANG00002.