




4/20/2021

MEMORANDUM FOR Sonny Hashmi  
Commissioner  
Federal Acquisition Service (Q)

FROM: Jeffrey Koses   
Senior Procurement Executive  
Office of Acquisition Policy (MV)

SUBJECT: Transactional Data Reporting Pilot Evaluation for  
Fiscal Year 2020

### 1. Purpose.

This memorandum provides the Office of Acquisition Policy's evaluation of the Transactional Data Reporting (TDR) pilot's performance in fiscal year (FY) 2020.

### 2. Evaluation Rating.

The TDR pilot is *Meeting or Exceeding Targets* as established by the TDR Pilot Evaluation Plan and Metrics (Version 2.0), based on its performance in FY 2020. This means the TDR pilot is now achieving its key metrics and has met our criteria for careful, focused expansion.

Our analysis of the pilot's FY 2020 performance is in the Analysis section of this memo. Additionally, the evaluation results for each metric and a scoring sheet are attached.

### 3. Background.

GSA issued the TDR final rule on June 23, 2016, which amended the General Services Administration Acquisition Regulation (GSAR) to establish two contract clauses requiring vendors to report transactional data from orders placed against its Governmentwide contract vehicles, including the GSA Federal Supply Schedule (FSS) program.

The final rule stated TDR would be implemented for the FSS program on a pilot basis and:

“...will be evaluated against a series of metrics that will include, but not be limited to, changes in price, sales volume, and small business participation, as well as macro use of transactional data by category managers and teams to create smarter buying strategies such as consumption policies. GSA’s Senior Procurement Executive will regularly evaluate progress against these metrics in consultation with the Administrator for Federal Procurement Policy and other interested stakeholders to determine whether to expand, limit, or discontinue the program. No expansion of the pilot or action to make Transactional Data Reporting a permanent fixture on the Schedules will occur prior to the careful evaluation of at least one year of experience with the pilot.”<sup>1</sup>

On June 24, 2016, the Federal Acquisition Service (FAS) announced the Schedules and Special Item Numbers that would participate in the TDR pilot.<sup>2</sup> FAS later stated its intention to run the pilot for three years.

The Office of Government-wide Policy (OGP) intended to assess the pilot’s performance with seventeen metrics outlined in an evaluation plan. This methodology was largely contingent upon stakeholders, namely FSS contracting officers, category managers, and customer agencies, having access to the data. The metrics also included findings from GSA’s Office of Inspector General and OGP’s Procurement Management Review Division.

Over the first two years of the pilot, data issues delayed FAS’s ability to provide stakeholders data access and thereby effectively made most of OGP’s metrics unusable. As a result, OGP’s first pilot evaluation, submitted to the GSA Administrator in the form of a decision paper in May 2019, provided a holistic assessment of the pilot to date.

The GSA Administrator approved the following recommendation from the decision paper on May 21, 2019:

“Extend the TDR Pilot through Fiscal Year (FY) 2020. The Senior Procurement Executive (SPE), in consultation with the Chief Acquisition Officer (CAO) and the Commissioner of the Federal Acquisition Service (FAS), will formally evaluate the pilot twice over this time period against a revised evaluation plan and metrics (Version 2.0).

- a. The first evaluation will be of FY 2019 performance and occur by January 31, 2020.
- b. The second evaluation will be of FY 2020 performance and occur by January 31, 2021. As part of the FY 2020 evaluation, the SPE will advise whether the pilot should be—

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<sup>1</sup> 81 FR 41104, June 23, 2016

<sup>2</sup> Schedules and SINs were subsequently realigned to match the Consolidated Multiple Award Schedule (MAS) solicitation issued on September 30, 2019.

1. Discontinued if it is significantly underperforming;
  2. Continued for another year if it is on track to meet targets; or
  3. Declared a success and become eligible for expansion if it is meeting or exceeding targets.
- c. FAS will develop a communications strategy that will help convey points along these lines—
1. The existing TDR pilot will continue through FY 2020; and
  2. The state of TDR beyond FY 2020 is contingent upon metrics demonstrating clear success and value of the TDR pilot.”

In January 2020, the Office of Acquisition Policy conducted its evaluation of the pilot's FY 2019 performance and determined it was *On Track to Meet Targets*. This meant the TDR pilot was producing more positive results than negative results but performance improvements were needed.

#### **4. Analysis.**

The TDR pilot has completed its fourth year and has met most of its objectives, proving TDR can become eligible for expansion. However, some of the ongoing challenges noted in the previous two evaluations, mainly operationalizing the data for use by FSS contracting officers, Category Managers, and ordering agencies, remain.

#### FY2018 Evaluation Summary

The FY 2018 TDR pilot evaluation, which was part of the May 2019 decision paper extending the pilot through FY 2020, noted:

“Two-thirds of the way through the planned 3-year pilot, the following benefits have been achieved:

- Burden on industry has been lowered.
- Price position has been maintained.
- FAS has worked through some data access issues and is beginning to provide data to Category Managers.

However, data usability remains questionable and no improved order-level buying strategies have resulted. Greater efforts to improve data usage and data usability are needed before GSA can justify making TDR a permanent fixture for the FSS program.

Additionally, FAS needs to show it can use the data it is currently collecting before expanding the scope of the pilot...”

#### FY 2019 Evaluation Summary

In FY 2019, we noted TDR performed well in several key aspects—

- Burden reduction, as evidenced by the increasing participation rate;
- Contract-level pricing, as represented by price changes in GSA Advantage;
- Schedule program spend, which continued to increase at a higher rate for the TDR portion of the program than the non-TDR portion;
- Data completeness, going from 73.6% in FY 2018 to 94.1% in FY 2019
- Small business performance, which saw TDR small business volume grow at a faster rate than non-TDR small business volume.<sup>3</sup>

Conversely, the biggest concern was in and around data usage and data usage policy under category management. We noted category managers must increase their use of the data and provide more resources to buying activities if TDR is to realize its full potential.

### FY 2020 Evaluation Summary

We completed our FY 2020 evaluation in January 2021 and found FAS continued to build upon the pilot's strengths and improve upon its weaknesses.

Pilot performance under all of the 9 evaluation metrics was maintained or improved from FY 2019 to FY 2020:

- The Data Completeness, Contract-level Pricing, Small Business Performance, and FSS Program Spend metrics continued to exceed their targets;
- Reporting Burden, as measured by the participation rate, is now exceeding its target;
- Transactional Data Usage by FSS contracting officers and order-level buyers, as well as FSS Program Cost, continued to be on track to meet their targets; and
- Transactional Data Usage by category managers is now on track to meet its targets after significantly underperforming in FY 2019.

FAS addressed last year's recommendation to clearly assign responsibility for managing the TDR pilot by aligning the MAS Program Office with the Government-wide Program Management Office for Category Management under the Office of Enterprise Strategy Management.

Finally, OGP and FAS coordinated the results with the Office of Federal Procurement Policy (OFPP). In summary, OFPP recommended GSA continue with the TDR pilot, citing the importance of category managers leveraging the TDR data through the Acquisition Analytics (AA) platform for agency engagement and market situational awareness within their respective categories. OFPP stated this more granular insight

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<sup>3</sup> The FY 2019 evaluation initially noted TDR small business volume lagged in comparison to non-TDR small business volume. However, FAS later noted the TDR small business figure it reported, 1.44%, was incorrect and was actually 14.4%.

into buying behavior, including actual prices paid, is foundational to the type of stewardship that category management is designed to achieve. OFPP also expressed encouragement that TDR has shown the potential to reduce burden for small businesses and other contractors that rely on the GSA Schedules as their primary gateway into the federal marketplace. OFPP requested GSA aggressively train contracting officers in using the data, as well as a robust integration of commercial catalog pricing data and other information that can enhance the value of TDR.

## **5. Recommendation.**

FAS has successfully demonstrated the value of TDR under the existing scope of the pilot. It has shown steady progress over the past four years, met most of the pilot's objectives in the most recent year, and has made the necessary investments to leverage TDR's potential in the years to come. While there is still a clear need for improvement, especially in contracting officer usage, there is no longer a need to limit TDR to its existing scope.

To expand TDR, FAS will need to aggressively train contracting officers on the benefits of having access to more granular prices paid information and to support these efforts with management guidance, as necessary. Other key elements of an expansion plan should consider:

- The ability of FSS contracting officers to leverage transactional data for price negotiations in lieu of Commercial Sales Practices (CSP) and Price Reduction Clause (PRC) disclosures;
- The impact of an expanded data collection on FAS's ability to leverage the data it currently collects;
- Impacts on current and future GSA Schedule contractors;
- Communication to industry partners ahead of changes;
- Training and tools for category managers that are currently not impacted by TDR;
- Potential impacts on other FAS initiatives, such as MAS Consolidation and implementation of Section 876 of the FY 2019 National Defense Authorization Act.

Once a clear expansion plan is complete, TDR is eligible for expansion.

Please coordinate with my office on the above considerations and I look forward to those conversations.

## **Attachments (2)**

- FY 2020 TDR Pilot Evaluation Results by Metric
- Scoring Sheet

# Transactional Data Reporting (TDR) Pilot Evaluation

## FY 2020 Results

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### Pilot Evaluation Roles and Responsibilities

- GSA's **Federal Acquisition Service (FAS)** is responsible for operating the pilot and providing needed data for the evaluation metrics outlined in this plan, as well as all other information requested by OGP for its pilot evaluation.
- GSA's **Office of Government-wide Policy (OGP)**, in consultation with the Executive Office of the President, **Office of Management and Budget (OMB)**, is conducting the pilot evaluation.

### Deadlines

- FAS will provide the information for the [FY 2020 Results by Metric](#) section below. OGP is requesting that FAS provide this information by **Friday, December 4, 2020** but ultimately must receive it no later than December 31, 2020.
- OGP will provide written findings for its FY 2020 evaluation by **January 31, 2021**.

### Guidance

- The metrics included in the TDR Evaluation Plan and Metrics (Version 2.0, May 29, 2019), along with the FY 2018 baseline and FY 2019 results, are listed below.
- **FY 2020 Results:** The updated results for FY 2020 should be inserted in this field for each metric.
- **Notes (Optional):** Some of the results will be straightforward, but in other instances FAS may want to explain what happened for a particular result. For example, if progress is slower than anticipated for a particular metric but FAS expects a breakthrough in the near future, it may want to share that information in the Notes field. OGP will share these findings in its written evaluation where appropriate.
- Please contact Matt McFarland, OGP Office of Acquisition Policy, at [matthew.mcfarland@gsa.gov](mailto:matthew.mcfarland@gsa.gov) for questions about the evaluation.

## FY 2020 Results by Metric

Note: The header of each table is color-coded to signify whether the respective evaluation score was high, medium, or low.

Metric	Data Completeness
Methodology	Percentage of transactional data reports that include data for the Manufacturer Name and Manufacturer (MFG) Part Number fields.
FY 2018 Baseline	73.6%
FY 2019 Results	94.1%
FY 2019 Notes (Optional)	Starting in November 2018, system validations were implemented in the TDR system to prevent users from entering blanks in MFG name and part number for transaction lines with product SINs.
FY 2020 Results	98.7%
FY 2020 FAS Notes (Optional)	FAS is completing additional user experience enhancements to provide additional instructions to Industry to continue the maturity of the data.
FY 2020 OGP Evaluation Notes	<p>The pilot received a high score (6 out of 6 points) for this metric because the 98% result exceeds the 90% target.</p> <p>The process FAS used to capture this request was to analyze the access controlled clean_transactional_sales table located in the GSA cloud. This table is where all TDR line item sales records are stored.</p> <p>There were ~1.95M records for FY20 where the contract+SIN was 'C' commodity code. FAS removed all zero sales entries and then searched those records for missing MFG Part Number or MFG Name. There were three data pulls against those records where they searched for missing MFG Part Number only, then for MFG Name only, and finally a search for records missing both MFG Name and MFG Part Number. FAS then took a percentage for each result and then averaged out the percentage over the three data pulls.</p>

Metric	Transactional Data Usage: FSS Contracting Officers
Methodology	Qualitative evidence of FSS contracting officers (COs) using transactional data to negotiate contract-level pricing on TDR pilot contracts.
FY 2018 Baseline	FSS contracting officers do not have access to the data.
FY 2019 Results	Currently, Industrial Operation Analysts (IOA)s are using the data in assessments to ensure a data maturity level of accuracy. Contracting Officers have access to the data if they have completed training and requested access.
FY 2019 Notes (Optional)	Waiting for a level of data maturity to provide official policy related to use of the data and integration of data into the 4P tool
<b>FY 2020 Results</b>	IOA Usage continues, and individual use cases exist for successful usage of TDR Data by a limited number of COs. At an enterprise level, FAS is waiting for a level of data maturity to provide official policy related to use of the data. Integration of the transactional data into the 4P tool is still in process. (XSB has been granted access to the transactional data and some data has been run through 4P for standardization).
<b>FY 2020 Notes (Optional)</b>	Individual use cases exist for successful usage of TDR Data. Best practice training for individual CO usage will be made available in FY21.
<b>FY 2020 OGP Evaluation Notes</b>	The pilot received a medium score (3 out of 6 points) because TDR pilot FSS COs can access the data and FAS is making progress to improve data usage.

Metric	Contract-level Pricing
Methodology	The quantitative percentage change in pricing for identical products on the same contract, adjusted for inflation using Consumer Price Index (CPI) Data.
FY 2018 Baseline	Change from pre-TDR (as of April 2018): TDR -5.21%, non-TDR -4.05% (TDR is 1.16% lower)
FY 2019 Results	During FY19 TDR contract pricing changed by -1.61%, non-TDR -1.29% (accounting for a CPI rate of 1.8% during FY19). TDR is .32% lower.
Notes (Optional)	---
<b>FY 2020 Results</b>	FY20 TDR contract pricing increased by 0.54%, non-TDR increased by 0.79% (0.25% higher than TDR contractors). On a CPI-U inflation adjusted basis, TDR contract pricing decreased by 0.64% while non-TDR contractor pricing decreased by 0.39%.
<b>FY 2020 Notes</b>	---



<b>(Optional)</b>	
<b>FY 2020 OGP Evaluation Notes</b>	<p>The pilot received a high score (6 out of 6 points) because the change to TDR contract-level pricing was better than non-TDR contract-level pricing.</p> <p>FAS's analysis was based on an extract of Advantage data each month that is compiled and then run through XSB. There were about 66 million records for each year (FY 2019 and FY 2020). Only items that were on contract for a year (10/01/19 to 10/01/20) were measured.</p> <p>The comparison of TDR and non-TDR pricing is based on the sum of pricing for TDR and non-TDR; the pricing change is the sum of all pricing for items that were on contract at that time. The TDR pricing sum was much higher than non-TDR pricing because of the nature of the contracts in the TDR pilot (e.g. contracts in the pilot are more likely to have larger product catalogs). The positive score was achieved because the sum of TDR pricing changed at a more favorable rate compared to non-TDR pricing.</p> <p>The CPI-U used to adjust pricing for inflation was obtained from the Bureau of Labor Statistics.</p>

Metric	Reporting Burden
Methodology	Participation rate of eligible contracts. GSA believes increases to the participation rate indicate contractors believe TDR is a more economical model, while decreases indicate contractors believe the CSP/PRC model is more economical.
FY 2018 Baseline	53.5% (2,123 out of 3,971 eligible contracts)
FY 2019 Results	56.68% (2,288 out of 4,037 eligible contracts)
FY 2019 Notes (Optional)	---
<b>FY 2020 Results</b>	61.3% (2,486 out of 4,053 eligible contracts)
<b>FY 2020 Notes (Optional)</b>	Due to the consolidation the number of eligible contractors was determined by listing any contractor that had at least one eligible SIN on the contract during FY 2020.
<b>FY 2020 OGP Evaluation Notes</b>	The pilot received a high score (6 out of 6 points) because the 61% participation rate exceeded the 60% target.

Metric	Transactional Data Usage: Category Managers
Methodology	Qualitative evidence of transactional data being used by category managers to improve order-level buying outcomes.
FY 2018 Baseline	IT, Office Management and Industrial Products have gained access to the TDR database, but only the IT category has been able to perform the necessary TDR data enrichments to produce actionable transaction data exports. These enrichments include blending TDR data with contract pricing artifacts and FPDS-NG for such that all data elements needed for the use within the Best Value Framework are present in the Schedule 70 IT Hardware and Software transactional data exports.
FY 2019 Results	<p>The TDR data source is presently leveraged to capture the post-execution transactional data for GSA Best In Class contract solutions that store their data in TDR. This data is transformed into a business/acquisition analyst consumable dashboard called the Acquisition Analytics Dashboard platform. It presents TDR data for a comparative analysis along the dimensions of price, manufacture, and purchase timing.</p> <p>GSA TDR based Best In Class contract solutions are presented alongside external Best In Class contract solutions within the Acquisition Analytics platform supporting GSA's fulfillment of its Best In Class data submission requirements and requirements of OMB memo M-19-13.</p> <p>Category Managers can then leverage the Acquisition Analytics platform for agency engagement and market situational awareness within their respective categories.</p> <p>The IT Category Manager leverages the IT Acquisition Analytics dashboards to engage customer agencies on ways that they can use Schedule 70 to meet their requirements while improving their BIC and Spend Under Management achievement.</p> <p>The Industrial Products and Services category is leveraging the platform for Supply Chain visibility including vendor and manufacturer. It additionally provides the category visibility into how their Best In Class contracts are being leveraged.</p>
FY 2019 Notes (Optional)	---
FY 2020 Results	GSA TDR continues to be the basis for the Best In Class contract solution for specific SINs and FSSI BPAs. During FY 2020 FAS completed a project run by the Category Management PMO to update the data management plan to provide

	<p>better access to agencies (especially category teams) the different levels of data based on their needs.</p> <p>Category Managers are able to leverage the TDR data through the Acquisition Analytics platform for agency engagement and market situational awareness within their respective categories. Transactional data and use of the platform is used with the BIC SINS: Specifically IT Hardware and Software, MRFS BPA and OS4. The following six Category Managers and supporting teams use this platform:</p> <ul style="list-style-type: none"> <li>● IT</li> <li>● Industrial Products and Services</li> <li>● Office Management</li> <li>● Facilities and Construction</li> <li>● Transportation and Logistics</li> <li>● Medical</li> </ul>
<b>FY 2020 Notes (Optional)</b>	In FY 2021 we will continue to work on the data maturity to increase the value and increase the marketing around the usage.
<b>FY 2020 OGP Evaluation Notes</b>	The pilot received a medium score (2 out of 4 points) because all 5 applicable categories now have access to the data, are starting to make use of it, and are making progress toward improving its use.

Metric	Transactional Data Usage: Buyers (Order-level)
Methodology	Qualitative evidence of transactional data being used by buyers at the order-level.
FY 2018 Baseline	Customer agencies do not have access to the data.
FY 2019 Results	<ul style="list-style-type: none"> <li>● Contract solution engagement with Departments/Agencies to demonstrate the commodity price combinations available from MRFS.</li> <li>● Customer agency use of the TDR backed Acquisition analytics platform to research and perform planning estimates for markets covered by Schedule 70 H/W &amp; S/W SINS, JANSAN, MRO, MRFS and OS4. Customer agencies include OSD (Schedule 70), USAF (Schedule 70, MRFS).</li> <li>● OSD Support <ul style="list-style-type: none"> <li>○ Management of DoD IT Spend.</li> <li>○ Support OSD Demand Management of DoD product and service requirements.</li> </ul> </li> <li>● USAF <ul style="list-style-type: none"> <li>○ Key contributing factor for USAF Shift from NETCENTS to GSA Schedule 70 is to help manage the USAF portfolios categories of spend.</li> </ul> </li> <li>● VA</li> </ul>

	<ul style="list-style-type: none"> <li>○ Supported MRFS engagement with VA to provide guidance to achieve cost avoidance using the MRFS solution.</li> </ul>
<b>FY 2019 Notes (Optional)</b>	<ul style="list-style-type: none"> <li>● Contract solution engagement with Departments/Agencies to demonstrate the commodity price combinations available from OS4 is forthcoming.</li> <li>● Both MRFS and OS4 are next generation solutions in their respective categories. Both came to market in 4QFY20 and plan to leverage the TDR data available via Acquisition Analytics platform going forward.</li> </ul>
<b>FY 2020 Results</b>	<p>During FY 2020 FAS completed a project run by the Category Management PMO to update the data management plan to provide better access to agencies (especially category teams) the different levels of data based on their needs.</p> <p>1) Global Acquisition Analytics - View counts in the "Traffic to View" and Database only goes back to September 2020 (New workbook published on 9/18/2020):  September 2020 - 121  October - 521  November - 300</p> <p>2) Acquisition Analytics - View counts in "Traffic to Views" data starting January 2020:  January 2020 - 671  February - 723  March - 479  April - 523  May - 301  June - 558  July - 563  August - 378  September - 467  October - 12  November - 1</p> <p>3) Acquisition Analytics Unmasked - View counts in "Traffic to Views" data starting July 2020:  July 2020 - 1  August - 33  September - 75  October - 12  November - 22</p>
<b>FY 2020 Notes (Optional)</b>	The VA has requested and gotten access to the raw data related to OS4 through the new data management instructions.

	Included instructions on how to access raw data in the monthly category management dashboard training and has been included in the quick decisions playbook.
<b>FY 2020 OGP Evaluation Notes</b>	The pilot received a medium score (2 out of 4 points) because some buyers have data access and progress is being made in increasing that access.

Metric	FSS Program Spend
<b>Methodology</b>	The rate-of-change for TDR pilot contracts is equal to or better than the rate-of-change for non-TDR pilot contracts in the GSA FSS program.
<b>Baseline:</b> Change from FY 2017 to FY 2018	TDR Pilot Contracts: Sales decreased by 0.78% <ul style="list-style-type: none"> <li>● FY 2017: \$6,581 million</li> <li>● FY 2018: \$6,529 million</li> </ul>
	Non-TDR Pilot FSS Contracts: Sales decreased by 3.99% <ul style="list-style-type: none"> <li>● FY 2017: \$25,658 million</li> <li>● FY 2018: \$24,635 million</li> </ul>
<b>FY 2019 Results:</b> Change from FY 2018 to FY 2019	TDR Pilot Contracts: Sales increased by 24.95% <ul style="list-style-type: none"> <li>● FY 2018: \$6,529 million</li> <li>● FY 2019: \$8,158 million</li> </ul>
	Non-TDR Pilot FSS Contracts: Sales increased by 0.04% <ul style="list-style-type: none"> <li>● FY 2018: \$24,635 million</li> <li>● FY 2019: \$24,646 million</li> </ul>
<b>FY 2019 Notes (Optional)</b>	---
<b>FY 2020 Results:</b> Change from FY 2019 to FY 2020	TDR Pilot Contracts: Sales increased by 43.84% <ul style="list-style-type: none"> <li>● FY 2019: \$8,158 million</li> <li>● FY 2020: <b>\$11,734 million</b></li> </ul>
	Non-TDR Pilot FSS Contracts: Sales increased by 0.85% <ul style="list-style-type: none"> <li>● FY 2019: \$24,646 million</li> <li>● FY 2020: <b>\$24,854 million</b></li> </ul>
<b>FY 2020 Notes (Optional)</b>	---
<b>FY 2020 OGP Evaluation Notes</b>	The pilot received a high score (2 out of 2 points) because the rate-of-change of program spend for TDR pilot contracts was better than that of non-TDR FSS contracts.

	The figures FAS reported are subject to change because of sales adjustments. However, those changes would not be large enough to affect the evaluation score.
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Metric	Small Business Performance
Methodology	Comparison of percentage change of cumulative sales between the two most recent fiscal years for TDR pilot small business contracts compared to TDR pilot-eligible small business contracts. Contracts being compared must have been in that status (TDR or not TDR) for all of the 2 most recent fiscal years.
Baseline: Change from FY 2017 to FY 2018	TDR Pilot Contracts: Sales decreased by .08% <ul style="list-style-type: none"> <li>FY 2017: \$2,580 million</li> <li>FY 2018:- \$2,578 million</li> </ul>
	Non-TDR Pilot FSS Contracts: Sales increased by 1.96% <ul style="list-style-type: none"> <li>FY 2017: \$9,252 million</li> <li>FY 2018: \$9,432 million</li> </ul>
FY 2019 Results: Change from FY 2018 to FY 2019	TDR Pilot Contracts: Sales increased by 14.4% (this was incorrectly reported as 1.44% in FY 2019) <ul style="list-style-type: none"> <li>FY 2018: \$2,578 million</li> <li>FY 2019: \$2,950 million</li> </ul>
	Non-TDR Pilot FSS Contracts: Sales increased by 7.03% <ul style="list-style-type: none"> <li>FY 2018: \$9,432 million</li> <li>FY 2019: \$10,095 million</li> </ul>
FY 2020 Notes (Optional)	---
FY 2020 Results: Change from FY 2019 to FY 2020	TDR Pilot Contracts: Sales increased by <b>4.7%</b> <ul style="list-style-type: none"> <li>FY 2019: \$2,950 million</li> <li>FY 2020: <b>\$3,089 million</b></li> </ul>
	Non-TDR Pilot FSS Contracts: Sales increased by <b>0.9%</b> <ul style="list-style-type: none"> <li>FY 2019: \$10,095 million</li> <li>FY 2020: <b>\$10,185 million</b></li> </ul>
FY 2020 Notes (Optional)	---
FY 2020 OGP Evaluation Notes	The pilot received a high score (2 out of 2 points) because the rate-of-change of program spend for TDR pilot contracts was better than that of non-TDR FSS contracts.  The figures FAS reported are subject to change because of sales adjustments.

	However, those changes would not be large enough to affect the evaluation score.
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Metric	FSS Program Cost
Methodology	Comparison of the year over year cost for FAS to run the FSS program, as specified in the total cost of operations line from the FAS Multiple Awards Schedule Statement of Operations.
FY 2018 Baseline	Change from FY 2017 to FY 2018: 7% decrease <ul style="list-style-type: none"> <li>\$242.5 million to \$224.6 million</li> </ul>
FY 2019 Results	Change from FY 2018 to FY 2019: 1% increase <ul style="list-style-type: none"> <li>\$224.6 million to \$227.6 million</li> </ul>
FY 2020 Notes (Optional)	---
<b>FY 2020 Results</b>	Change from FY 2019 to FY 2020: <b>4% increase</b> <ul style="list-style-type: none"> <li>\$227.6 million to <b>\$237.5 million</b></li> </ul>
<b>FY 2020 Notes (Optional)</b>	
<b>FY 2020 OGP Evaluation Notes</b>	<p>The pilot received a medium score (1 out of 2 points) because there was no conclusive difference in FSS program cost from FY 2019 to FY 2020. Costs increased by 4% but total costs (\$237M) were less than planned costs (\$260M) and total fee revenue (\$262M).</p> <p>OGP's score was based on an analysis of the FAS Multiple Awards Schedule Statement of Operations provided by the GSA Office of the Chief Financial Officer.</p>

TDR Pilot Evaluation Scoring Sheet - FY 2020

Total Evaluation Score	Metric Scoring Key	Decision Matrix	Decision Methodology			
30	Meeting or Exceeding Targets	27 to 38 points = formalize and/or expand TDR.	27 points or more means TDR is hitting multiple targets, is on track for most others, and is not significantly under-performing for one of the highest weighted metrics (Data Quality, Data Usage - PCO, Contract-level Pricing, TDR Participation Rate) plus any one of the remaining metrics with a direct correlation to TDR (Data Usage - Category Managers, Data Usage - Buyers).			
	On Track to Meet Targets	16 points to 26 points = perform further analysis.	16 points or more indicates TDR is producing more positive results than negative results.			
	Significantly Under-performing	less than 16 points = end TDR pilot.	Less than 16 points indicates TDR is significantly off track for multiple metrics and is meeting few targets.			
Evaluation Objective	Statement of Accomplishment	Metric	Methodology	Target	Weight	Score
Determine if TDR can establish fulfill the CSP and PRC function while lowering industry reporting burden.	TDR data is complete enough to be used for contract-level price negotiations.	Data Completeness	Percentage of transactional data reports that include data for the Manufacturer Name and Manufacturer Part Number fields.	>90%	6	6
				71-89%	3	
				<70%	0	
	FSS contracting officers (PCOs) are using data to negotiate contract-level pricing.	Transactional Data Usage: FSS Contracting Officers	Qualitative evidence of FSS contracting officers (PCOs) using transactional data to negotiate contract-level pricing on TDR pilot contracts.	All TDR pilot PCOs have access to the data and data is used meaningfully for	6	3
All TDR pilot PCOs have access to data but are not making meaningful use of it, although FAS is making progress to improve usage.				3		
Not all TDR pilot PCOs have access to data and/or FAS is not making progress to improve usage.				0		
TDR contract level pricing is not substantively higher than non-TDR contract level pricing.	Contract-level Pricing	The quantitative % change in pricing for identical products on the same contract, adjusted for inflation using Consumer Price Index (CPI) Data.	Equal to or better	6	6	
			0.01% to 1.99% worse	3		
			2.00% or worse	0		
TDR is less burdensome than the CSP/PRC for FSS vendors.	Reporting Burden	TDR Participation Rate	>60%	6	6	
			50% to 60%	3		
			<50%	0		
Determine if GSA can use transactional data to improve buying outcomes.	FAS demonstrates TDR contributes to better outcomes at the contract-level and order-level.	Transactional Data Usage: Category Managers	Qualitative evidence of transactional data being used by category managers to improve order-level buying outcomes.	All 5 applicable category managers with access to TDR are actively using data	4	2
				3 or more of 5 applicable category managers are using data and progress is being made to improve usage.	2	
				Less than 3 of 5 applicable category managers are using data and/or little progress in improving usage.	0	
	FAS demonstrates TDR contributes to better outcomes at the contract-level and order-level.	Transactional Data Usage: Buyers (Order-level)	Qualitative evidence of transactional data being used by buyers at the order-level.	Data is available for all eligible buyers and/or data tools are available in all applicable categories for eligible buyers.	4	2
Some buyers have data access and progress is being made to increase access and/or FAS is providing data tools for buyers under at least 3 categories.				2		
Buyers do not have access to data and/or FAS has provided data tools for less than 3 categories.				0		
Determine how TDR is impacting the FSS program's health.	TDR is not negatively impacting FSS sales volume.	FSS Program Spend	The rate-of-change for TDR pilot contracts is equal to or better than the rate-of-change for non-TDR pilot contracts in the GSA FSS program.	Equal to or better	2	2
				0.01% to 1.99% worse	1	
				2.00% or worse	0	
	TDR is not negatively impacting small businesses participating in the FSS program.	Small Business (SB) Performance	Comparison of % change of cumulative sales by sales between 2 most recent fiscal years for TDR pilot small businesses compared to TDR pilot-eligible small business contracts. Contracts being compared must have been in that status (TDR or not TDR) for all of the 2 most recent fiscal years.	Equal to or better	2	2
				0.01% to 1.99% worse	1	
				2.00% or worse	0	
TDR is not negatively impacting GSA FSS program costs.	FSS Program Cost	Comparison of the year-over-year cost for FAS to run the FSS program, as specified in the total cost of operations line from the FAS Multiple Awards Schedule Statement of Operations.	Less	2	1	
			No conclusive difference	1		
			More	0		