GSA Managed Mobility Program





Managed Mobility Program

Mobile Lifecycle & Expense Management User Guide

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Managed Mobility

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1 What is the GSA Managed Mobility Program

The GSA Managed Mobility Program has been established to provide information, guidance, support, and resources for agencies looking to transition from their legacy mobile environment to one that can better capture the emergence of smart phone and tablet technologies. We view the mobile ecosystem as comprising of separate but integral components. This new mobile ecosystem includes the wireless carriers, the devices, security/monitoring tools, and the management of the lifecycle and expenses associated with the components of this mobile ecosystem.

We at GSA have been addressing components of this new mobile ecosystem by creating solutions to assist agencies with the procurement of the needed technology. For example GSA created the Wireless FSSI Program, sister program to the Managed Mobility Program, which established BPAs that created a clear procurement mechanism for agencies to procure wireless services (inclusive of devices) from wireless carriers. More information on this program can be found at www.gsa.gov/wirelessfssi.

Further we have developed comprehensive, cross-agency requirements for Mobile Device Management, Mobile Application Management, and Mobility Integration (MDM/MAM/MI) solutions that can be procured via existing government-wide vehicles approaches available to every federal agency. The program created and still maintains a list of potential sources of enterprise-class mobile management solutions that meet the greatest governmental needs. More information on this program can be found at www.gsa.gov/managedmobility.

2 What is Mobile Lifecycle and Expense Management (ML&EM)

With this effort we now address the ability for agencies to procure solutions to assist with the assessment of the carrier services, deployment and disposition of the devices, loading of the security tools, and tracking of devices and associated expenses. We call this **Mobile Lifecycle & Expense Management**, or **ML&EM**. These capabilities can help lower costs and drive savings for agencies through more effective management of mobile resources, between 8%-20% of wireless spending, as well as savings on transaction costs associated with procuring new wireless services and management of the devices.

The federal government's ability to effectively and efficiently manage mobile assets and efficiently acquire ML&EM solutions is a key emerging need as federal agency personnel increasingly demand mobile access and applications, and as the federal agencies provide mobile tools to their workforce to satisfy this demand and capture the potential associated with a more mobile environment. This means everything from deploying and configuring a system to track an agency's mobile assets, track the expenditures associates with the assets, and provide the capability to deploy solutions to help secure their assets. Expense auditing, expense management, inventory management, facilitating the ordering, billing, and payment of wireless services, and generating the associated reports are also critical. Finally, advantageously configuring agency wireless plans based on usage data analytics, using evidence based methodology to settle disputes with carriers, and providing agencies with the market intelligence necessary to choose the lowest cost wireless carrier service that satisfies an agency's need are vital capabilities of this industry that where agencies can realize cost savings of upwards of 25% of their wireless services.

2.1 Features & Core Functionality

The primary features of ML&EM are expense management and inventory management When agencies can better track the usage, rates, and billing associated with their mobile devices they save money. Typically the savings are greater early in the ML&EM process (upwards of 25%) and then level out (up to 10%) after the initial auditing and plan optimization is complete.

Mobile Lifecycle & Expense Management Core Functionality

- Project Management and Planning
- Device and Expense Audit Capabilities
- Expanse Management
- Inventory Management
- Invoice Consolidation & Processing
- Order Management

- Service and Device Acquisition
- Bill Payment
- Dispute Resolution
- MDM Integration
- Cost Allocation
- Device Disposition

2.2 Why a Program and Not a Vehicle

The Managed Mobility Program, and the ML&EM component, is not a new acquisition vehicle. The GSA Managed Mobility Program instead creates requirements in conjunction with other federal agencies, releases these requirements to industry to solicit responses, assesses the responses with our federal agency partners, and then maps the ability to procure solutions by leveraging existing government-wide procurement vehicles.

We do this for a couple of reasons. Firstly, GSA had an FSSI TEMS contract, however most agencies used other means, including other GSA vehicles, to procure TEMS solutions so that was allowed to expire. Secondly, there are a number of ways to procure mobile solutions, including carrier services, MDM solutions, and ML&EM. No one way is better than another, and the procurement approach is going be driven by agency needs. Sometimes this need is a one-off, meaning they procure each solution separately. In many other instances, however, agencies are looking to blend various components to address their need.

Creating a static contractual mechanism cannot adapt easily to this desire, but existing vehicles like IT 70, Wireless FSSI, Connections II or the Alliant GWAC may be better able to accommodate. This program, then, provides analysis, best practices, guidance and a central repository of information for government-wide use.

2.3 How the Program Will Evolve Over Time

The GSA Managed Mobility Program will periodically reevaluate government mobility requirements and reassess marketplace solutions with consideration of government-wide acquisition capabilities. This will result in updated programmatic offerings, updated procurement tools, and updates to the list of potential sources under each programmatic offering. All updates to the program will be communicated through the web site www.gsa.gov/managedmobility.

GSA acknowledges that functional capabilities and requirements will evolve over time. This evolution can be captured through the existing programmatic structure; however we do anticipate revisiting this programmatic methodology in the future.

3 Assessment Methodology

The GSA Managed Mobility Program developed requirements for ML&EM with industry leaders, and a cross-governmental team composed of CIOs, CISOs, IT Mobility, and Telecommunication professionals (including representatives from agencies like DHS, DOJ, DOD, DISA, and DOE), to identify governmental needs and solutions that can be acquired and deployed rapidly through existing government-wide procurement vehicles. The responses were assessed by the cross-governmental team against these comprehensive requirements to identify those solutions that appear to best meet the federal need. These requirements include Technical Factors, Security Compliance Factors, and Past Experience. Only solutions that are accessible through a government-wide vehicle were considered.

3.1 **Technical Factors**

The GSA Managed Mobility Program worked with a number of industry leaders and partner agencies to identify functional, security and technical requirements that are common across government. The requirements document, identified as an RFTC, constituted the functional and security requirements, as well as optional functionality, to which responses were assessed. Each response was assessed for conformance to these stated requirements by representatives of the cross-governmental team, and the assessments were reviewed for consistently applied interpretations of the requirements and responses before being considered valid. These validated assessments were then compared to one another to determine the market-based threshold for technical sufficiency, and to determine the baseline to indicate those solutions meeting the greatest governmental need.

3.2 **Security Compliance Factors**

Three compliance factors were assessed separately: ability to supply cleared personnel (all levels), FIPS 140-2 Validation, FISMA Authorization to Operate (ATO).

FIPS 140-2 is the (National Institute of Standards and Technology) NIST standard that addresses the use of cryptographic algorithms in IT systems. A solution was assessed as FIPS 140-2 sufficient if it claimed FIPS 140-2 Validated cryptography was in use for all cryptographic operations, AND that claim could be traced to a listed FIPS 140 Validation Certificate (directly or indirectly), to the NIST FIPS 140 "Modules in Process" list, or to proven deployment in a federal setting and have previously been granted an ATO. Solutions not using FIPS 140-2 Validated where appropriate are less likely to receive an ATO from Agency leadership, and were excluded as a potential source of supply.

The FISMA ATO factor examined the solution for evidence that either the entire solution, or the key technical elements of it, had received an ATO for FISMA Moderate from a government

agency in an actual deployment. This can be a time-consuming and costly exercise, so only solutions that provided evidence they had completed this process were included in the potential sources of supply.

3.3 **Experience / Evidence of Enterprise Integration**

The GSA Managed Mobility Program required that respondents provide enterprise integration examples that were sufficiently detailed as to prove the capability of integrating solutions into a federal enterprise, with each other through the ML&EM portal, with the MDM tools, as well as inclusive of the agency's processes, policies, and procedures. GSA also required respondent to prove the ability to manage between 2500-10,000 devices, and well as the ability to audit, track and manage multiple device plans from different carrier services simultaneously, while offering additional scalability beyond that amount. While initial agency deployments may be lower, the anticipated demand for mobile lifecycle and expense management will routinely exceed that threshold.

Past experience was a major component in terms of identifying potential sources for ML&EM.

4 Potential Sources of Supply

Solutions that have been determined to meet the greatest governmental needs as measured against the functional ML&EM requirements, have been deployed in the federal government, and are verified to be FIPS 140-2 capable are listed alphabetically. We expect that these potential sources are capable of meeting the requirements that we defined as most common across government. Vendor claims should be verified before acquisition. Agencies are free to procure solutions that do not appear below.

4.1 Mobile Lifecycle & Expense Management Table

			Acquisition
ML&EM Solutions	Contact	Partners/Resellers*	Approaches**
			IT Schedule 70
A&T Systems	Adam Nouravarsani	IBM & MaaS360	Connections II GWAC
	adam@ats.com		Alliant GWAC**
	(301) 384-1453 x343		GSA 8(a) Stars II
			SB Set Asides
Highland Technology Services (SDVOSB)	Robert (Bob) Wells Bob.Wells@htsi.net (240) 683-8840	ClearInsight Solutions	IT Schedule 70 SB Set Asides
	(240) 003-0040		IT Schedule 70
Turning Point	David Hughes David.hughes@tpgsi.com (301) 795-1620	EMW, Netcom Technologies Inc, & VetsAmerica	Connections II GWAC** Alliant GWAC** GSA 8(a) Stars II GSA Vets** SB Set Asides

^{*} This may not be an exhaustive list of partners/resellers. For a more exhaustive list please ensure that you contact the solution provider for details.

^{**} Acquisition Approaches include those government-wide procurement vehicles available to the ML&EM solution's partners

5 How to Acquire Solutions

The GSA Managed Mobility Program is intent on assisting government agencies acquire mobility management solutions, including Mobile Lifecycle & Expense Management, more quickly, at lower cost and with less risk.

5.1 **Primary Considerations**

Your agency wireless ecosystem was fairly straightforward at one point in time. Agency personnel were issued their device that managed email, calendar, and served as a phone. The device security was managed on the back end, and there was little to consider other than which wireless carrier would be used and for how long. We have quickly shifted into an environment that is much more dynamic. Personnel may now have more than one device, and each of these devices need to be tracked and secured. These devices commonly go through much more frequent refreshment cycles that did not exist in the previous mobile environment. Further, agencies often have more than one wireless carrier provider, which complicate managing usage, billing data, and identifying optimal plan usage according to the carrier contract. What was once relatively simply has gotten significantly more complex, and many agencies can benefit from procuring ML&EM solutions that can produce significant savings.

5.1.1 ML&EM and The Need to Go Mobile

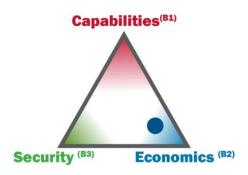
DGS 9.1 includes an excellent guide to determining the extent of mobile device needs vs. desires within an agency, and ML&EM could address some of the concerns that agencies may have in going mobile. Some of the considerations are:

- How mobility will support the agency mission
- Cost
- Change in security posture
- Productivity impact of increased user mobility
- Agency obligations with increased mobility (contractual compensation requirements when contacting staff off-shift, policy and legal implications of BYOD, etc.)

Please refer to the Mobile Computing Decision Framework in DGS 9.1, available at www.gsa.gov/managedmobility.

5.1.2 ML&EM and Mobility Decision Balancing

Once the mobile capability objective has been defined with respect to the agency mission, the balance of capabilities, economics and security follow. This section of the User Guide offers a cursory overview. For the full process, please refer to the DGS 9.1 Mobile Computing Decision Framework.



The Decision Balance point is represented by the blue dot in the figure above. The closer the Decision Balance point is to a particular factor's vertex, the more critical that factor is to mobile component selection. Again, ML&EM services can help affect the balance that agencies consider when determining the extent of their agency mobile footprint.

The three decision balancing factors are defined as follows:

Capabilities: The closer a point is to the Capabilities vertex, the more important the ability to support a wide range of applications and uses becomes. The Capabilities factor reflects the overall flexibility of the device in supporting a wide range of uses. In general, every mobile application that a mission uses requires increased device capability.

Security: The closer a point is to the security vertex, the greater security must be addressed in terms of compliance (policy), threat management, and data integrity. This factor determines the importance of information security to the mission. Some missions, such as those dealing purely with publicly available information, do not require strong security. Other missions, such as those that use Sensitive but Unclassified (SBU) information or Controlled Unclassified Information (CUI) have a strong need for security.

Economics: The closer a point is to the economics vertex, the more important availability, cost, and user familiarity become. Economics includes not only the overall cost of a solution but also training costs and the availability of commoditized components that may be included.

5.1.3 Adapting Existing ML&EM Requirements

The GSA ML&EM RFTC contains functional and security requirements that constitute industry standards and agency desires, and that can be immediately incorporated into agency acquisitions. The required capabilities are those that the industry and cross-governmental working group indicated were needed to deploy a mobile lifecycle & expense management solution in their enterprise.

5.1.3.1 What can you remove?

While some requirements will always need to appear in any IT procurement (FISMA compliance, FIPS 140, audit, access control), others may be optional depending on the agency mission and use case. What you remove may depend on the approach you are taking. Any functional requirement that you can accomplish in-house, for example, is a requirement that you can safely remove, such as the deployment of the MDM onto the device before disposition. Just remember that the value of ML&EM is to lower costs, and any requirement you remove could impact the ability of the provider to help capture those cost savings.

5.1.3.2 What should you add?

Any unique agency-specific requirement should be included in the agency RFP, however remember that the proposed sources of supply may not be able to accommodate functionality that falls too far beyond what has been defined. Requirements that are extremely specific, such as management of land/mobile radio system expenses, may not be available from one of the proposed sources of supply. Agencies are free to procure solutions that are not listed, and are encouraged to use the Managed Mobility materials and Program Office to advance that process.

5.2 Availability on Existing Government-Wide Vehicles

The ability to procure MDM solutions currently exist via multiple government-wide procurement vehicles. Each vehicle's applicability will be dependent on the ordering activity's requirements, needs, and acquisition strategy. Below is a short description of the particular procurement approach, vehicle applicability, and considerations one needs to make when procuring MDM from each.

5.3 **Procurement Approaches/Considerations**

The primary method that agencies have used to procure ML&EM solutions are through the GSA IT Schedule 70 contract vehicle. That being said, all of the identified vendors are also identified as small business concerns, and are accessible through other means, including directed 8(a) contracts, the 8(a) Stars GWAC, or through other contract vehicles via partnership agreements with other vendors (as listed in the table 4.1). These procurements are straight forward as they are most often governed by either FAR 8.4 (Federal Supply Schedules), FAR 19 (Small Business Programs), or through the procurement rules and usage guidance of a particular GWAC. However, there approach may be dependent on the overall mobility effort that you are engaging in.

5.3.1 **FSSI Wireless**

The FSSI Wireless BPA can be used as a source of ML&EM. Wireless carriers are certainly capable of addressing some, though not all, of the desired functionality. If you are an agency that already has a good grasp of your mobile assets and expenses, and are capable of managing dispute resolution independently, this would be a perfectly acceptable vehicle to consider. Difficulties can occur, however, if you are an agency that deploys multiple carriers within your agency, as you could end up with multiple expense management platforms, as well as MDMs. For a homogenous mobile environment, consider ML&EM within your wireless carrier purchases through FSSI Wireless.

5.3.2 **Leveraging FAR 51 Deviation**

Another more innovative approach could be the use of FAR 51 deviation. If you are an agency that is seeking to bridge your wireless carrier plans, devices, MDM deployment, and ML&EM management of those assets, one possible consideration would be leveraging the GSA FAR 51 Deviation: http://www.gsa.gov/portal/category/100975?utm_source=FAS&utm_medium=print-radio&utm_term=far51deviation&utm_campaign=shortcuts

ML&EM vendors often help identify the acquisition pathways for wireless carrier services that are most advantageous to the agency. This is a contract optimization is a core feature of ML&EM, and it can lead to a scenario where ML&EM provider can act in more proactive capacity for procuring wireless carrier service.

The deviation states that the "Federal Government contracting officers are now authorized to give all GSA contractors access to the Federal Supply Schedule (FSS) and GSA Global Supply Programs when deemed appropriate for fulfillment of their agency requirements." If a CO deems it appropriate to extend this to an ML&EM vendor, it is allowable.

Further, this authority is limited to contract/orders that:

 Placed on a time-and-materials (T&M)/labor-hour (LH) basis—a contract awarded or an order placed by the Federal Government to the buying contractor can be partially fixed price, but the portion of the contract/order for the items to be procured using the FAR 51 deviation must be T&M/LH;

In other words, an agency task order can be fixed price, but you would have to indicate the CLINS that are applicable to the wireless service component and indicate in the solicitation that you consider them to be of a T&M nature.

• For ancillary supplies/services that are in support of the overall contract/order such that the items are not the primary purpose of the work ordered, but are an integral part of the total solution offered;

For this to be practicable an agency would have to consider the wireless plan integral but ancillary to a program office's effort, and this is not a stretch. If an agency considers the management, security, inventory, deployment, and associated expenses of the devices the primary service, the carrier service (including the devices) becomes integral but ancillary to the purpose of the mobility effort.

The associated guidance with leveraging FAR 51 deviation clearly states that "there is no dollar value or quantity that defines ancillary" and continues that the order from the buying contractor to the selling contractor cannot require a SOW and needs to be simple fixed price products or services. A Mobile Lifecycle & Expense Management integrator can assess the needs and simple state carrier service for 100 devices in location X without requiring a SOW by leveraging the IT 70 Schedule-based FSSI Wirless BPAs.

• Issued in accordance with the procedures in FAR 8.405-1, Ordering Procedures for supplies, and services not requiring a statement of work (applicable only to orders placed against Schedule contracts);

In other words, the ML&EM provider must adhere to the rules of FAR 8.405-1. They would essentially identify the number of devices and location of the service, solicit vendors indicating that they are conducting an RFQ against the FSSI Wireless program, provide the letter of agency that allows them to do so, and award. The methodology is clearly defined in the guidance, and it clearly states what the contractor must do, as well as the role of the CO in the process. See item 3.0 responsibilities and 6.0 Authorization Template in the FAR 51 deviation link provided above.

• Placed by the Federal Government. The authorization is NOT available to state and local governments.

VERY IMPORTANT!!! For an agency to leverage this authority, an agency CO would to include clause 52.251-1 Government Supply Sources.

Leveraging this authority is a tool that an agency CO would have at their disposal if the need and circumstances call for it.

6 Acquisition Assistance

The GSA Managed Mobility program is committed to assisting agencies in procuring Solutions that help secure and manage mobile devices. We can leverage our knowledge of the commercial sector, federal security requirements, and acquisition approaches to provide in depth analysis to better inform agency customers. We can assist with acquisition strategies, provide scope reviews for proposed acquisition approaches, and validate agency assumptions concerning the market and solution capabilities regardless of whether they have been identified as potential sources of supply or not. Further, if there is a need for assisted acquisitions we can facilitate that internally within GSA's Assisted Acquisition Service.

6.1 When to call for help?

Agencies are encouraged to use and adapt the materials provided for their procurement purposes. If there are any questions related to the materials provided agencies are encouraged to contact Jon Johnson, Program Manager.

6.2 **Program Manager Contact Information**

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