LET'S TALK: DON'T FAR ON MY OTA

ADVANTAGE DOD 2024:
DEFENSE DATA & AI SYMPOSIUM

February 25, 2024

OTA CHAMPIONS

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SPEAKER FOCUS: BONNIE EVANGELISTA

15 YEARS AS AN ACQUISITION PROFESSIONAL IN GOVERNMENT (MOSTLY PROCUREMENT)

10 YEARS EXECUTING OTHER TRANSACTIONS AS IN DOD AND TRANSPORTATION SECURITY ADMINISTRATION

JUST GO FASTER

SPEAKER FOCUS: STEPHANIE WILSON

17 YEARS AS AN 1102 CONTRACT SPECIALIST IN THE DEPARTMENT OF DEFENSE

5 YEARS PRACTICING OTHER TRANSACTIONS AS AN AGREEMENTS OFFICER

PASSIONATE ABOUT SIMPLIFYING TRADITIONAL PROCUREMENT PROCESSES

SPEAKER FOCUS: STEPHANIE WILSON

9 YEARS AS AN 1102 CONTRACT SPECIALIST IN THE DEPARTMENT OF DEFENSE

5 YEARS PRACTICING OTHER TRANSACTIONS AS AN AGREEMENTS SPECIALIST

WILL NEVER GO BACK TO THE FAR

TOPICS

OT MISCONCEPTIONS

A discussion on the most common feedback we get from practitioners

DEFINITIONS

Let’s baseline some common terms you need to know.

BONNIE’S OT FRAMEWORK

Understanding how to think when developing strategies using OTAs is critical

STEPHANIE’S OT TENENTS

These are our guiding principles when working in unstructured and unprecedented environments leveraging OTAs.

OT DEFINITIONS

OT = other transaction/ OTAs = other transaction authorities	not a procurement contract, grant, or cooperative agreement
prototype OT	Section 843 of the FY2023 NDAA*
nontraditional defense contractor (10 USC 4022 (e)(2))	not subject to full CAS coverage a year prior to solicitation
competition to the maximum extent practical	AO discretion; CICA does not apply!

*Includes a (1) proof of concept, (2) pilot or novel application of commercial tech for defense purposes, (3) new business model, (4) demonstration of operational utility, (5) agile development activity

OT MISCONCEPTIONS

“IT’S ILLEGAL / OTs ARE A LOOPHOLE”

“OTs ARE THE EASY BUTTON TO GO FAST”

“OTs REQUIRE EXTRA WORK”

“FAR-BASED CONTRACTS ARE THE PATH TO LEAST RESISTANCE”

“I DON’T HAVE TIME TO LEARN SOMETHING NEW”

BONNIE'S OT FRAMEWORK

STATUTORY AUTHORITY

What am I required to do by statute?

DOD/AGENCY GUIDANCE

What does the Department of Defense or applicable Agency say I should consider?

LOCAL POLICY

Local guidance that implement specific procedures (reporting, approvals, etc.)?

BEST PRACTICES

Are there any best practices I should leverage that will facilitate innovation in my project?

MORE SPECIFICALLY

STATUTORY AUTHORITY

Statutory Authority: 10 U.S.C. § 4021 (Research) 4022 (Prototypes & Production)

"***directly relevant to enhancing mission effectiveness***"

Must use nontraditional defense contractor or 1/3 cost share from traditional contractor (unless waived)

Competition to the maximum extent practical

DOD GUIDANCE

DoD Other Transactions Guide for Prototype Projects (June 2023)

STEPHANIE'S OT TENETS

DON'T FAR OVER MY OTA!

DOCUMENT OR THE GOV'T WILL FORCE YOU TO DO IT

IT'S NOT WRONG, IT'S JUST DIFFERENT

COMFORT IS THE KILLER OF INNOVATION

FAILURE IS YOUR FRIEND

ACTUALLY IMPLEMENT LESSONS LEARNED

SOME EXAMPLES

"[A]gencies are encouraged to leverage other events, activities, or even authorities to provide for the collection of potential solutions."
-DoD OT Guide

CREATIVE SOLICITATION METHODS	PRICE REASONABLENESS without Price Competition
Tradewinds Solutions Marketplace	Not "fair and reasonable" determination in accordance w/ FAR
Shark Tank/Product Pitch, Oral Presentation	Price Analysis techniques are your friend
Hackathon, Design Sprint, Tech Demo	other creative techniques: ROI analysis, affordability

QUESTIONS

THANK YOU FOR LISTENING!