

**REQUEST FOR INFORMATION (RFI)
FOR USPTO's ACTIVITY-BASED INFORMATION PROGRAM
DOC52PAPT1200057**

THIS IS A REQUEST FOR INFORMATION (RFI) BEING RELEASED PURSUANT TO FEDERAL ACQUISITION REGULATION (FAR) PART 10: MARKET RESEARCH. This RFI is issued solely for informational, market research, and planning purposes only. It does not constitute a Request for Proposal (RFP) or a promise to issue an RFP in the future. This RFI does not commit the Government to contract for any supply or service whatsoever. Further, the United States Patent and Trademark Office (USPTO) is not at this time seeking proposals, and will not accept unsolicited proposals. Respondents are advised that the United States (U.S) Government will not pay for any information or administrative cost incurred in response to this RFI. All costs associated with responding to this RFI will be solely at the responding party's expense. Responses to the RFI will not be returned. Please be advised that all submissions become Government property and will not be returned. Not responding to this RFI does not preclude participation in any future RFP, if any is issued. Responses to this notice are not offers and cannot be accepted by the U.S Government to form a binding contract. It is the responsibility of the interested parties to monitor the Federal Business Opportunities (www.fbo.gov) site and the [USPTO Vendor Information web page](#) for additional information pertaining to this RFI.

Background

The US Patent and Trademark Office is a fully fee funded organization in the Department of Commerce with a mission to promote progress of science and the useful arts by securing, for limited times to inventors, the exclusive right to their respective discoveries.

The Activity Based Information (ABI) initiative is a continuation of the cost management work begun in previous phases dating back to 1997. Today, the ABI program drives development of the Statement of Net Cost, reports on performance measures, initiates budget formulation and provides data for cost-based decision making. Recently, the ABI program has played a pivotal role in the fee-setting process as dictated by the Leahy-Smith America Invents Act (AIA) (Public Law 112-29) of 2011. ABI employs a rigorous, defensible, and repeatable activity based costing methodology consisting of multiple cost models in order to meet the changing needs of the organization.

Scope

The purpose of the Request For Information (RFI) is to gain an understanding of the market's capacity to support an upcoming acquisition of services for the Activity Based Information program. Vendors' responses to this RFI will provide the USPTO with a brief snapshot and an indication of the corporate capabilities and organizational/cultural support for the primary services to be acquired. Any resulting Request For Proposal (RFP) or Request For Quote (RFQ) issued by the USPTO will result in a contract/order that supports the following tasks:

- Activity Based Cost (ABC) model management
- Development of the Statement of Net Cost from ABC model data

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- Revenue & Fee Analysis
- Fee cost analysis to support fee setting
- Supporting legislative mandates around cost management, performance management, budgeting and fee setting
- ABC related training and change management
- Program and project management
- Executive and Cost Management reporting
- For purposes of this RFI, NAICS code is 541511 applies to the work described herein.

RFI Requirements:

Please respond with your company qualifications only rather than including teaming arrangements.

Respondents will e-mail their responses as an attachment that includes one Adobe.pdf document that has:

1. A cover page,
2. A one page company overview that provides a brief description of your company, years of experience in federal consulting, services, business size, DUNS number and point(s) of contact, including name, phone number(s), and e-mail address, and
3. Responses to the Capability Survey Questions below.

The following list of questions must be completed and submitted with your response to the RFI. For all questions that you respond in the affirmative, please provide a narrative justification. Please limit each narrative justification to one page per question (12 pitch font, Times New Roman, one inch margins). DO NOT make comments where the answer is NO.

#	Capabilities Survey: Questions/Comments (limit one page/question)	Yes/No
1	Are you a public accounting firm? <i>Comment if answer is yes:</i>	
2	Do you have experience collecting compensation and non-compensation costs using Program, Project and Activity codes in compliance with Common Government Accounting Classification (CGAC) structure? <i>Comment if answer is yes:</i>	
3	Do you have any experience with Patent or Trademark processes? <i>Comment if answer is yes:</i>	
4	Do you have any experience with supporting cost recovery fee setting in federal government? <i>Comment if answer is yes:</i>	
5	Do you have any experience with federal fee-funded agencies? <i>Comment if answer is yes:</i>	

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6	<p>Do you have any experience with developing financial statements from ABC data such as the Statement of Net Cost and associated foot notes? <i>Comment if answer is yes:</i></p>	
7	<p>Do you have experience using ABC methodology to completely model IT expenses and expenditures for show-back/chargeback purposes into categories such as infrastructure activities, business systems and investment by benefiting customers? <i>Comment if answer is yes:</i></p>	
8	<p>Do you have experience with the following USPTO systems?</p> <ul style="list-style-type: none"> • SAP Business Objects (for Enterprise Data Warehouses) • CGI Momentum suite • Patent Application Location and Monitoring (PALM) system <p><i>Comment if answer is yes:</i></p>	
9	<p>Do you have experience with the following ABC tools? If yes, please describe your implementation and model maintenance experience with the tools listed below.</p> <ul style="list-style-type: none"> • SAP PCM • Metify ABM <p><i>Comment if answer is yes:</i></p>	
10	<p>Do you have any rule making experience related to fee restructuring? <i>Comment if answer is yes:</i></p>	
11	<p>Describe your thought leadership in the area of ABC and Cost Management. <i>Provide response:</i></p>	N/A
12	<p>Describe your experience with agency-wide ABC program implementation with best of breed ABC tool, including stakeholder management, communications, change management, and training. <i>Provide response:</i></p>	N/A
13	<p>Do you have dedicated ABC practitioners currently in your organization? If yes, please provide bios of select employees with cost management, fee setting, and financial statement (SNC) experience. Please also provide relevant engagement details and length of service with your organization. <i>Comment if answer is yes:</i></p>	
14	<p>Are you on the GSA MOBIS Schedule?</p>	

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15	Do you have experience responding to fee and ABC related inquiries from auditors, IG, OMB, GAO, and Congress? <i>Comment if answer is yes:</i>	
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Inquiries

Those who wish to submit questions concerning the RFI may do so by e-mail to the Contracting Officer, marva.brown@uspto.gov by Wednesday, May 14, 2012, 12:00 Noon Eastern Standard Time (EST) Alexandria, VA. Please include the RFI number in the subject line. All questions and answers will be made available via a modification to the RFI posted on the Federal Business Opportunities website (www.fbo.gov) and the [USPTO Vendor Information web page](#) no later than 1 week before the due date of the RFI responses.

Instructions for RFI Responses

Responses must be submitted electronically to the e-mail address below:

EMAIL: marva.brown@uspto.gov

Respondents must submit their responses via email in pdf format no later than **May 24, 2012, 5 p.m. EST, Alexandria, Va.**

Proprietary information submitted in response to this RFI will be protected from unauthorized disclosure as required by the Federal Acquisition Regulation (FAR). All proprietary markings should be clearly delineated. The respondent shall identify where data is restricted by proprietary or other rights and mark it accordingly.

If a solicitation is released, it will be issued via the Federal Business Opportunities website (www.fbo.gov) and the [USPTO Vendor Information web page](#). It is the responsibility of the potential offerors to monitor these websites for any information that may pertain to this RFI or a future RFP or RFQ. The information provided in this RFI and any future changes to the RFI are subject to change and are not binding on the USPTO.

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RFI Response Contact

Respondents to this RFI shall designate a primary and one alternate point of contact within the company (Name, Address, Email, and Telephone Number).

Clarification of RFI Responses

To fully comprehend the information contained within a response to this RFI, there may be a need to seek further clarification from those respondent(s) identified as capable. This clarification may be requested in the form of brief verbal communication by telephone; written communication; electronic communication; or a request for a presentation of the response to a specific USPTO group or groups. The USPTO reserves the right to seek additional information from those vendors identified with unique solutions that are determined to be beneficial to the USPTO.