TRADEWINDS

Tradewinds Solutions Marketplace W52P1J-23-S-CTSM

CUSTOMER HANDBOOK

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Welcome to the Tradewinds Solutions Marketplace

The Department of Defense (DOD) Chief Digital and Artificial Intelligence Office (CDAO) in conjunction with its marketplace manager, The Applied Research Institute (ARI), initiated a pilot effort in June 2022 to establish a Marketplace of new and novel technology solutions to advance research, development, prototyping, and adoption of AI/ML, digital, and/or data solutions. The Tradewind Solutions Marketplace (TSM) concept was developed and officially launched on November 1, 2022, and has gained both attention and traction amongst the target communities of cutting-edge technology firms, academic research institutions, and government organizations. In June 2024, the TSM moved from MVP into a viable acquisition model.
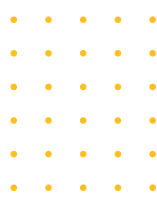
What is the Tradewinds Solutions Marketplace?

The Tradewinds Solutions Marketplace is a digital environment of post-competition video pitches. The video solutions housed within the marketplace have been assessed through competitive procedures that conform to the competition requirements of 10 USC 4021, 10 USC 4022, 10 USC 3458, FAR/DFARS Part 35, and DFARS Subpart 212.70, and thus are readily available to be viewed, selected, negotiated, and awarded by Government organizations. The Marketplace provides a venue for Government organizations to search, view, review, compare, contrast, contact, negotiate, and procure AI/ML, digital, and/or data capabilities through rapid acquisition pathways.

💡 How To Use This Handbook

This Handbook details the requirements and steps for participation in the TSM for Government customer organizations (requiring activities). The Handbook details how Government customer organizations and personnel may leverage the TSM, communicate with solution providers, initiate procurement actions, request acquisition support, report awards, participate in the management and direction of the TSM model, issue special topics, and leverage additional resources. The purpose of this Handbook is to assist Government personnel in rapidly acquiring TSM solutions to meet organizational mission requirements.

Who can Participate in the Tradewinds Solutions Marketplace?

The TSM was developed on behalf of the DOD Chief Digital and AI Office to address the specific needs of the CDAO and its customer organizations within the AI/ML, Digital, and Data solution space, and is focused on the Strategic Focus Areas identified within the official TSM Announcement. The TSM is built upon Federal and defense-specific authorities, and as such, non-DOD, interagency availability of solutions must be handled on a case-by-case basis to conform with Federal laws. For DOD Organizations and the Services, the TSM Program has some flexibility to support solutions outside of the AI/ML, digital, and data space as detailed within the description of Special Topics below. For Non-DOD Federal Civilian Agencies, the availability of TSM solutions via the TSM Program is limited to the Federal-Wide Authorities leveraged (Broad Agency Announcement). For Federal Agencies that share Other Transaction Authorities with the DOD (DHS, DOE, IC, others), availability will be determined on a case-by-case basis. Please refer all questions to the TSM Marketplace Manager, the Applied Research Institute, via success@tradewindai.com.

Tradewinds Solutions Marketplace Foundational & Resource Documents

The TSM is founded and supported through the following official program documents:

1. The TSM Announcement: The Announcement is the official solicitation document supporting the TSM and is designed to conform to the requirements of the underlying TSM solicitation authorities: 10 USC 4021, 10 USC 4022, 10 USC 3458, FAR/DFARS Part 35, and DFARS Subpart 212.70. The Announcement serves concurrently as a Broad Agency Announcement (FAR/DFARS Part 35), Commercial Solutions Opening (Regulatory Version - 10 USC 3458/DFARS 212.70), and Commercial Solutions Opening (Non-Regulatory Version - 10 USC 4021/10 USC 4022). The TSM Announcement is published through the Governmentwide Point of Entry (SAM.gov) and provides information for solution providers on the eligibility criteria, submission requirements, assessment process, factors and weighting, scoring rubric, as well as program-specific requirements for participation in the TSM. The intended audience of the announcement is potential solutions providers from industry and academia.
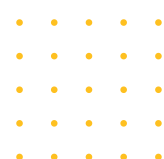
2. The TSM Customer Handbook. The Customer Handbook details the requirements and steps for participation in the TSM for Government customer organizations. The Handbook details how Government customer organizations and personnel may leverage the TSM, communicate with solution providers, initiate procurement actions, request acquisition support, report awards, participate in the management and direction of the TSM model, issue special topics, and leverage additional resources. The intended audience of the Customer Handbook is requirements personnel from program offices, labs and engineering centers, operational communities, and other requiring activities.

3. The TSM Acquisition Guide. The Acquisition Guide details the selection, award, award reporting, and administration of procurement actions of Marketplace Solutions. The Guide was developed by the CDAO in cooperation with other contracting activities to provide descriptions, checklists, samples, and templates specific to the wide array of award instruments available to acquire marketplace solutions. The Guide provides detailed instructions for varied award types including FAR-based orders, contracts, and agreements, as well as non-FAR award instruments, along with some agency-specific procedures. The intended audience of the Acquisition Guide is contracting activities, contracting officers/specialists and Agreements Officers/Specialists.

4. TSM Assessment Package(s). A TSM Assessment package refers to the assessment documentation related to a single TSM Video Solution. The Assessment package is available to Government Customer Organizations / Contracting Activities upon request. The Assessment package includes the Solution Video submission information (month of submission, month of assessment, month added to the marketplace, video link and all submission field data) as well as the solution's written assessment, scoring, and assessor comments. The audience for the Assessment Package is customer organizations considering potential procurement of a marketplace solution as well as contracting activities documenting the underlying competitive process results for a procurement action.
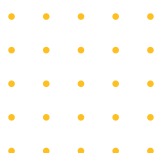
Tradewinds Solutions Marketplace Foundational & Resource Documents

The below steps identify the customer organization requirements for procuring a marketplace solution. These steps are specific to the customer organization personnel and do not replace the steps required of the contracting activity as detailed within the TSM Acquisition Guide.

[1] View Solutions and Communicate with Solution Providers:

The first step in leveraging the Solutions Marketplace is to search, filter, and view the relevant solutions for your organization. The TSM is organized with relevant filters by Strategic Focus Area, Business Size, Traditional/Non-Traditional Status, as well as by socioeconomic programs. All solutions within the Marketplace are post-competitive, meaning they can be procured without further competition. Identifying which of the solutions is the best fit for a given problem can be achieved through these filters, as well as through direct communication with the solution providers themselves.

Procuring a solution through the TSM

1. View Solutions & Communicate with Solutions Providers
2. Vendor Vetting
3. Select a Solution
4. Request Contracting Activity Support
5. Request Assessment Package/ Acquisition Guide
6. Determine or Document Scope of the Effort
7. Request Pricing / Perform Cost/Price Analysis
8. Support Negotiation & Award
9. Award Reporting

It is highly recommended that Government personnel engage directly with Solution Providers either through the comment box function included within each video solution page or via the identified company point of contact.

[2] Vendor Vetting

The TSM Process does not replace Agency requirements related to security, export-control, authority to operate, responsibility determination, Foreign Ownership, Control or Influence, facilities clearance, and other agency or effort-specific requirements. While the solutions included in the Marketplace have been assessed as satisfying Federal competition requirements for the authorities identified, it is the responsibility of the customer organization and awarding activity to satisfy all agency and effort-specific requirements. To accelerate the award process, it is recommended that customer organizations request information to determine whether a TSM solution has the controls in place to support a given effort.
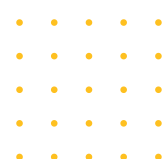
[3] Select a Solution

All solutions contained within the Solutions Marketplace have satisfied Federal competition requirements and are available to procure without further competitive procedures. As the solutions have undergone the competitive process(es) under 10 USC 4021, 10 USC 4022, 10 USC 3458, FAR/DFARS Part 35, and DFARS Subpart 212.70, organizations may procure them without the use of a Justification and Approval under FAR Part 6 (J&As are only required for exemptions/exceptions to competition). While not required, organizations may choose to conduct a price competition of available Marketplace solutions to obtain competitive pricing against an identified requirement and select a solution for award.

[4] Request Contracting Activity Support

The Tradewinds Solutions Marketplace Program employs a "Federated" or "Distributed" Contracting Model in which customer organizations must use their assigned cognizant contracting activity to process marketplace awards. The CDAO does not currently provide contracting support to customer organizations unless the awarded effort includes CDAO equities. To process awards from Marketplace companies, the customer organization must contact its cognizant contracting activity with a request for contracting support. For contracting activities that are not familiar with the TSM, the TSM Marketplace Manager, ARI, will provide organization, team, or even individual information sessions to educate contracting personnel on the processes and authorities relevant to the Marketplace. Under this federated contracting approach, different contracting support activities may request additional information from selectees, such as a further description of the offering, pricing information, desired milestones, and intellectual property requirements and/or restrictions. Requests for information sessions can be submitted to success@tradewindai.com.

[5] Request Assessment Package / Acquisition Guide

Once a solution has been identified for procurement, the customer organization (in collaboration with the cognizant contracting activity) must request a copy of the relevant solution's Assessment Package and the TSM Acquisition Guide. Requests should be submitted through success@tradewindai.com with the subject; "Request for Assessment Package - [Insert Title of Video Solution]". The Assessment package includes the Solution Video submission information (month of submission, month of assessment, month added to the marketplace, video link and all submission field data) as well as the solution's written assessment, scoring, and assessor comments.

[6] Determine/Document the Scope of the Effort and Special Requirements

Once you have selected a solution, engaged your cognizant contracting activity, and requested/received the vendor's assessment package and a copy of the TSM Acquisition Guide, you are ready to draft the scope of the effort. The scope of your project should be developed in collaboration with the solution provider and your contracting activity. During this step of the process, you want to document the scope of the effort, deliverables, schedules, terms and conditions, and all special requirements. The object of this step is to draft proposed agreement terms for the vendor to estimate and submit a price proposal for the effort. The TSM Acquisition Guide provides more information on executing this step in the process with your Contracting Activity and selection solution provider.

[7] Request Pricing / Perform Cost / Price Analysis

Once the scope of the effort and all associated terms have been drafted, the contracting activity should request a price proposal from the vendor to perform and deliver according to the terms provided. The level of detail of the cost/price proposal is dependent on the proposed award instrument (other transaction agreement, procurement contract, purchase order, etc); the total value of the effort Cost and Pricing Data Thresholds); the status of the vendor (small vs. large / Traditional vs. nontraditional); the contract type (Fixed vs. Cost type); and the commercial status of the effort (commercial vs. non-commercial). Pricing of the contractor's price proposal should conform with appropriate law, regulation, and policy relevant to the effort.

[8] Support Negotiation and Award

Negotiation of terms, conditions, price, schedule, and deliverables shall be conducted in accordance with applicable laws, regulations, and policies. While the cognizant contracting activity is responsible for negotiating, drafting, and awarding the effort, customer organization personnel as the technical experts and requirements holders should provide support to the negotiation to expedite the process. Negotiation support may include review of labor categories, labor mix, travel requirements, materials, schedule, deliverables, or other related matters. Where required, the customer organization must identify a qualified Contracting/Agreements Officer's Representative (COR/AOR) and/or Technical Point of Contact (TPOC). Once negotiations are complete, the cognizant contracting activity shall follow standard award procedures in accordance with applicable laws, regulations, policies, and procedures.
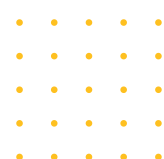
[9] Award Reporting

It is the responsibility of both the Customer Organization and the cognizant contracting activity to assure that any award of marketplace solutions is properly reported to the TSM Marketplace Manager (in addition to standard agency award reporting procedures). Award data required includes the name of customer activity, awarding contracting activity, award date, total value of award, name of solution provider receiving the award, title of the relevant video solution, and procurement instrument identifier (PIID). Award reports can be sent to the TSM Marketplace Manager via success@tradewindai.com, with the subject "TSM Award Report".

Special Topics

The TSM Marketplace Manager, ARI, in collaboration with the CDAO and other Government Organizations can support the planning, development, announcement, collection, assessment, and selection of solutions for Special Topics. A Special Topic is any topic that either falls outside of the standard TSM Strategic Focus Areas; or which falls within the TSM Strategic Focus Areas but contains additional technical requirements which must be addressed within the video submission (or additional documentation) and must be assessed. Special Topic Assessments will run concurrently with the regular monthly collection/assessment of the TSM to ensure maximum flexibility for organizations who wish to leverage the Special Topic process. The Special Topic process allows the organization a fee-free trial of the solutions marketplace model and enables the organization to address a specific problem set via an "opportunity" (Open Call) under the TSM umbrella.

When conducting a Special Topic the customer organization will be responsible for: (1) Developing the modified Open Call language; (2) Identifying subject matter expert assessors to assess the video submissions; (3) Providing a selecting Government Official to serve as the final approval authority on all video submissions; and (4) Coordinating with the cognizant contracting activity early in the Special Topic process to assure rapid, streamlined selection and award. The Special Topic process is a great opportunity for customer organizations and contracting activities to try the solutions marketplace model and assess its fitness for their particular organization, while processing a real-world requirement.

Organizations interested in learning more about running a Special Topic under the Tradewinds Solutions Marketplace should contact the Marketplace Manager, ARI, through success@tradewindai.com.
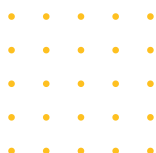
Champions Council Participation

The TSM Marketplace Manager, in coordination with the TSM Sponsor Organization, the DOD Chief Digital and AI Office has established a Solutions Marketplace Champion's Council to gather feedback on desired features and services in supporting full-scale adoption of the solutions marketplace model across DOD and the services. The council consists of early Government adopters in all acquisition disciplines and the operational community and meets quarterly (virtually) to discuss process improvements for the Marketplace.

As a member of the Council, you will have the opportunity to: (1) Provide valuable feedback to enhance the functionality and user experience of the Marketplace; (2) Help identify and prioritize features and services that will drive adoption and improve the Marketplace's value proposition; (3) Share best practices and success stories to facilitate broader adoption within the DoD; (4) Ensure the Marketplace model aligns with operational needs of the acquiring organizations and integrates seamlessly into existing workflows; and (5) Ensure the experience of the submitters is positive and provides a low barrier for entry into the government space.

Individuals interested in participating in the Champion's Council should identify their interest in a message to success@tradewindai.com.
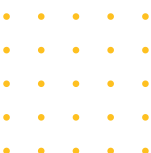
Additional Resources

The Marketplace Manager, ARI, and the TSM Sponsor Organization, the DOD Chief Digital and AI Office have made several additional resources available to solution providers, customer organizations, and contracting activity personnel.

Links to those resources are identified below:

Tradewinds Solutions Marketplace Tools and Service Information Page
https://www.tradewindai.com/solutions-marketplace

Tradewinds Solutions Marketplace Announcement v6
https://sam.gov/opp/034cbefeadd04741bd88489fd41478eb/view

Tradewinds Solutions Marketplace Opportunity
https://www.tradewindai.com/opportunities/cljmyfxh00000l1090eeyez2s

Tradewinds Education Center
https://www.tradewindai.com/education-center

Tradewinds Real People Time (Weekly One-on-One Office Hours)
https://www.tradewindai.com/events

Tradewinds Help Desk
Success@tradewindai.com

Tradewinds Updates and Information
https://www.linkedin.com/company/tradewind-ai/

THANK YOU

FOR MORE INFORMATION, CONTACT:
SUCCESS@TRADEWINDAI.COM

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