**Software Inventory**
Software inventory available for: Comp. Associates, some Oracle products and some Sybase products. Please contact the CHESS Helpdesk for more information: 888.232.4405

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**CHESS Software Flow Chart**

**Software Requirement**
(Server/Datacenter SW)*

- **Is Competition required?**
  - No: Use accepted Statement of Non-Availability to obtain Goal 1 Waiver through CIO/G-6 Request a Goal 1 Waiver
  - Yes: Conduct Market Research to compare the CHESS vendor quote amongst open market vendor quotes.

- **Can the requirement be met by a CHESS Contract Vehicle?**
  - Yes: Yes
  - No: Procure from a non-CHESS Contract Vehicle

- **Is the CHESS quote fair and reasonable?**
  - Yes:
  - No: Submit a Statement of Non-Availability to purchase from an alternative source Request a Statement of Non-Availability

* A Goal 1 Waiver is required for Server/Datacenter-related software.
<table>
<thead>
<tr>
<th>Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>![Blue square icon]</td>
<td>Blue - Planning Action/Business Process rule</td>
</tr>
<tr>
<td>![Orange triangle icon]</td>
<td>Red - CHESS/CIO G6 - Related Action</td>
</tr>
<tr>
<td>![Green square icon]</td>
<td>Green - Purchasing Action</td>
</tr>
<tr>
<td>![Home icon]</td>
<td>Home Icon – Return to Flow Chart</td>
</tr>
</tbody>
</table>
COTS IT Software Requirement

- **AFARS 5139.101 (S-90) (a)**
  - Mandates the use of CHESS and DoD/ESI for Software requirements
  - The Army’s Computer Hardware, Enterprise Software Solutions (CHESS) program, under PEO EIS, is the mandatory source for commercial IT purchases. CHESS contracts provide IT products and services that comply with NETCOM, Army and DoD policy and standards. **Purchasers of commercial hardware and software must satisfy their IT requirements by utilizing CHESS contracts** (https://chess.army.mil) and DoD Enterprise Software Initiative (DoD ESI) (www.esi.mil) agreements first, regardless of dollar value. *Any purchase made outside of CHESS contracts requires a waiver.*

- **Datacenter/Server-related software affected by the IT Spending Moratorium**

  * A CHESS Statement of Non-Availability must be requested before submitting for an AKM Goal 1 Waiver from CIO/G6 to purchase outside of CHESS. An Approved Statement of Non-Availability does not constitute approval to purchase or deviate from any Army regulation or policy.*
<table>
<thead>
<tr>
<th>Can the requirement be met by a CHESS Contract Vehicle?</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Microsoft</strong></td>
</tr>
<tr>
<td><img src="https://chess.army.mil/Static/MSLicenses" alt="Image" /></td>
</tr>
<tr>
<td>Army, Air Force, and DISA have entered into a Joint Enterprise Licensing Agreement (JELA) to purchase Microsoft software under a single Blanket Purchase Agreement (BPA). Per the Justification &amp; Approval signed by Army, Army customers MUST purchase from this agreement. The licensing portal, which acts as product &amp; price list, point of purchase, and market research tool for the MS JELA is located at <a href="https://chess.army.mil/Static/MSLicenses">https://chess.army.mil/Static/MSLicenses</a>. The process to purchase is outlined in the attached guide.</td>
</tr>
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<thead>
<tr>
<th><strong>Software Maintenance</strong></th>
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</thead>
<tbody>
<tr>
<td><strong>Software Maintenance as a Service</strong> – Software maintenance that does not require the purchase (freeware is not a purchase) of new software products or hardware is considered a service. Per AFARS 5139.101 (S-90) (c), waivers from CHESS are not required when procuring IT services. Customers have the choice to solicit services only requirements to ESI BPA vendors at <a href="http://www.esi.mil">www.esi.mil</a>, the ITES-2S/ITS-SB vendors at <a href="https://chess.army.mil">https://chess.army.mil</a>, or the open market.</td>
</tr>
<tr>
<td><strong>Software Maintenance as a Product</strong> – Software maintenance that does require the purchase of new software or hardware products are subject to the mandate to utilize CHESS and DoD ESI. Review <a href="http://www.esi.mil">www.esi.mil</a> and the CHESS Software Agreements, to determine whether those vendors are able to meet your maintenance requirement.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Other Software Requirements</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>There are certain instances where a J&amp;A was written at the contract level. For further information, please contact the <a href="https://chess.army.mil/Helpdesk">CHESS Helpdesk</a>.</td>
</tr>
<tr>
<td>In lieu of the exceptions mentioned, all software-only requirements should be solicited to vendors listed at <a href="http://www.esi.mil">www.esi.mil</a> and the CHESS Software Agreements. Solicit the vendors via their listed contact information.</td>
</tr>
</tbody>
</table>
Is Competition Required?

It is the responsibility of the Ordering party to ensure the quote received represents the best value to government for most of CHESS software agreements. There are certain instances where a J&A was written at the contract level. For further information, please contact the CHESS Helpdesk at 888.232.44056 or ARMYCHESS@mail.mil. For single-award agreements that do not have a J&A written at the contract level, additional quotes obtained from CHESS vendors (where applicable) or the Open Market will satisfy competition requirements.

- FAR 6.302 defines 7 general circumstances for creating a Sole Source Justification. The following is an excerpt:

  - **Circumstances permitting other than full and open competition.**
    - 6.302-1 Only one responsible source and no other supplies or services will satisfy agency requirements.
    - 6.302-2 Unusual and compelling urgency.
    - 6.302-3 Industrial mobilization; engineering, developmental, or research capability; or expert services.
    - 6.302-4 International agreement.
    - 6.302-5 Authorized or required by statute.
    - 6.302-6 National security.
    - 6.302-7 Public interest.
Contract Details

From the Software Agreements page on the CHESS website, select the software product/vendor you wish to view.

Select the “POCs” tab to view the vendor POC(s).

Select the “Ordering Info” tab to view the Ordering Instructions for that Agreement.
Market Research Policy and Procedures Summary

Solicitations for Software-only requirements should NOT be submitted to CHESS Hardware or Services vendors. For single award software agreements that do not have a J&A, additional market research quotes may be solicited through Open Market sources.

10.001 Policy.
(a) Agencies must—
   (1) Ensure that legitimate needs are identified and trade-offs evaluated to acquire items that meet those needs;
   (2) Conduct market research appropriate to the circumstances—
   (3) Use the results of market research to—
      (i) Determine if sources capable of satisfying the agency’s requirements exist;
(b) When conducting market research, agencies should not request potential sources to submit more than the minimum information necessary.

(a) Acquisitions begin with a description of the Government’s needs stated in terms sufficient to allow conduct of market research.
(b) Market research is then conducted to determine if commercial items or nondevelopmental items are available to meet the Government’s needs or could be modified to meet the Government’s needs.
   (1) The extent of market research will vary, depending on such factors as urgency, estimated dollar value, complexity, and past experience.
(c) If market research indicates commercial or nondevelopmental items might not be available to satisfy agency needs, agencies shall reevaluate the need in accordance with 10.001(a)(3)(ii) and determine whether the need can be restated to permit commercial or nondevelopmental items to satisfy the agency’s needs.
(d)(1) If market research establishes that the Government’s need may be met by a type of item or service customarily available in the commercial marketplace that would meet the definition of a commercial item at Subpart 2.1, the contracting officer shall solicit and award any resultant contract using the policies and procedures in Part 12.
Determining Fair and Reasonable

After obtaining quotes through Market Research, analyze and compare the quotes received using the methods explained below. Make a determination on the validity of the quote based on price, requirement and timeframe to deliver. If the CHESS quote is deemed reasonable, then reference the Contract Details page for Ordering Instructions. If the CHESS quote is deemed unreasonable (based on price, requirement and/or timeframe), then you must submit for a Statement of Non-Availability and an AKM Goal 1 waiver.

15.402 Pricing policy.
Contracting officers shall—
(a) (1) Shall obtain certified cost or pricing data when required by 15.403-4, along with data other than certified cost or pricing data as necessary to establish a fair and reasonable price; or
(2) When certified cost or pricing data are not required by 15.403-4, shall obtain data other than certified cost or pricing data as necessary to establish a fair and reasonable price
(3) Obtain the type and quantity of data necessary to establish a fair and reasonable price, but not more data than is necessary...Use techniques such as, but not limited to, price analysis, cost analysis, and/or cost realism analysis to establish a fair and reasonable price. If a fair and reasonable price cannot be established by the contracting officer from the analyses of the data obtained or submitted to date, the contracting officer shall require the submission of additional data sufficient for the contracting officer to support the determination of the fair and reasonable price.

8.405-3 Blanket purchase agreements (BPAs).
(a) Establishment.
(1) Ordering activities may establish BPAs under any schedule contract to fill repetitive needs for supplies or services. Ordering activities shall establish the BPA with the schedule contractor(s) that can provide the supply or service that represents the best value.
(2) In addition to price (see 8.404(d) and 8.405-4), when determining best value, the ordering activity may consider, among other factors, the following:
   (i) Past performance.
   (ii) Special features of the supply or service required for effective program performance.
   (iii) Trade-in considerations.
   (iv) Probable life of the item selected as compared with that of a comparable item.
   (v) Warranty considerations.
   (vi) Maintenance availability.
   (vii) Environmental and energy efficiency considerations.
   (viii) Delivery terms.
The following memo establishes the requirement to obtain a Goal 1 Waiver for data center-related software. The items named in the following guidance require a Goal 1 Waiver before purchasing, whether through CHESS or an outside source.

Is your item included in the Moratorium?

Yes

Will this item be purchased through CHESS?

Yes

Obtain Goal 1 Waiver through CIO/G-6
Request a Goal 1 Waiver

Contracting Officer issues Purchase Order to CHESS Vendor

Obtain Goal 1 Waiver through CIO/G-6
Request a Goal 1 Waiver

Procure from a non-CHESS Contract Vehicle

No

Submit a request for a Statement of Non-Availability to purchase from a non-CHESS Contract Vehicle