



FM QSMO Program Update

Shared Services Forum – Shared Services Leadership Coalition (SSLC)
U.S. Department of the Treasury, Bureau of the Fiscal Service

March 14, 2024

Role of the FM QSMO

The FM QSMO manages a marketplace of solutions and services to respond to agency needs, and works to deliver value through partnerships, collaboration and information sharing.

Marketplace Management



Manage a Marketplace of **standards-based** solutions and services for federal agencies

Onboard providers to provide choice for customers and meet a variety of FM needs



Provide **support**, resources and **guidance** to agencies for using the Marketplace

Outreach and Engagement



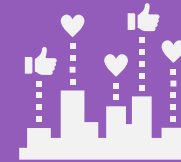
Encourage collaboration and partnerships through working groups and stakeholder meetings

Leverage channels of communication and FM community forums to share information and broaden Marketplace awareness



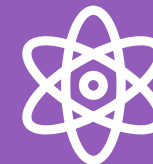
Partner with stakeholders to understand needs and **improve experiences**

Modernization Support



Share lessons learned and leading practices to **promote collaboration** and benefit future initiatives

Identify common strategies and approaches to modernizing



Assess the FM system landscape to understand the current state of technology and timelines for significant modernizations

Marketplace Catalog

With the **FM QSMO Marketplace Catalog** serving as a storefront:

- **Providers** can showcase standards-based FM solutions and services evaluated by the FM QSMO as meeting baseline requirements
- **Agencies** can identify available providers and explore featured solutions and services to support financial system modernizations, sustain current operations, and fulfill a variety of other FM needs

Access the *FM QSMO Marketplace Catalog* at:
<https://www.fiscal.treasury.gov/fmqsmo/marketplace-catalog.html>

BUREAU OF THE Fiscal Service FM QSMO Financial Management Quality Service Management Office

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Welcome to the FM QSMO Marketplace Catalog

Bureau of the Fiscal Service > FM QSMO > Marketplace Catalog

What is the FM QSMO Marketplace Catalog and how can it help me and my agency?

The FM QSMO (Financial Management Quality Service Management Office) Marketplace Catalog is a resource for agencies to explore, identify, and research solutions and services that can help support financial management needs and accomplish shared government-wide goals.

Through the technology, advisory, and operational services offered, there is choice and flexibility for agencies planning financial system modernizations, sustaining current operations, and/or fulfilling a variety of other financial management needs.

Commercial and federal providers play important roles in the FM QSMO Marketplace. The Marketplace Catalog also features products and services provided by the Bureau of the Fiscal Service with a focus on value-added services that help promote efficiency, streamline processes, and support expansion of electronic alternatives.

Business Intelligence G-Invoicing eCommerce
Operations and Maintenance Project Management
Process Automation Implementation Support
Transaction Processing Investment Planning
Change Management Data Management
Accounting Operations Disbursements
Document Workflows Centralized Receivables
Reporting Dashboards Improper Payment Detection Forecasting
E-Invoicing Collections Payments Processing Audit Support Fraud Mitigation
Cost Management Data Analysis Budget Set-Up and Maintenance

Commercial Vendor Offerings Federal Shared Service Provider Offerings Bureau Product & Service Offerings

A Growing Marketplace

The growing Marketplace currently showcases over 70 solutions and services available from 11 commercial vendors, 4 federal providers, and Treasury's Fiscal Service that can meet a variety of FM needs.

Automation
Receivables Accounting Operations eCommerce Tools Budget Tools
Transaction Processing Implementation Support E-Invoicing Business Process Mapping
Business Intelligence Dashboards Reporting Budget Management Business Operations
Forecasting Financial Audit Remediation Improper Payment Detection Migration Support
Collections Lease Compliance Core FS Integration Support Secure Payments
Operations and Maintenance Investment Planning Project Management Document Workflows
Data Analysis G-Invoicing Change Management Data Management Disbursements
Risk Assessment Enterprise Risk Management

HIC

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CGI

savantage solutions

BEYONData

Deloitte.

PAPERLESS
INNOVATIONS



Marketplace Benefits

The FM QSMO Marketplace offers several benefits to agencies and participating providers.

Benefits to Agencies



Trusted Source

As the first stop for agencies seeking FM solutions and services, customers benefit from FM QSMO pre-vetting of providers and offerings and can focus on their unique requirements



Standards-Based Offerings

Ensuring baseline standards are embedded into marketplace offerings helps agencies plan modernizations, comply with federal policies and support improved data accuracy and reporting



Choice and Flexibility

The Marketplace includes a wide range of offerings from commercial vendors, federal providers, and Treasury's Fiscal Service promoting choice and flexibility to fulfill many FM needs



Performance Management

The FM QSMO periodically evaluates implemented offerings using provider service measures to ensure quality and customer satisfaction

Benefits to Providers



Provider Showcase

Providers can showcase their capabilities, offerings, FM expertise and industry best practices through an agency-trusted Marketplace



Better Way of Doing Business

The Marketplace will be the first stop for agencies seeking FM solutions and services. Vendors receive consistent information on applying emerging standards into products and services



Diverse & Inclusive Marketplace

Businesses of all sizes and categories have equal opportunity to join the Marketplace



Innovation Platform

Vendors can introduce new and innovative solutions that meet emerging agency needs and priorities through the Marketplace

Supporting Marketplace Use



Agency Guidance on Marketplace Use

OMB continues to direct agencies to work with the FM QSMO as their first stop to plan for acquiring solutions and/or services through the Marketplace.



Growing Agency Interest

Several agencies are working with us to prepare for Marketplace acquisitions. This includes discussions around defining requirements, approaches and submission of proposed acquisitions for review prior to solicitation release.



Current Needs

Agencies are showing significant interest in Marketplace solutions and services that will support operational activities and existing systems such as Core FS technical support, reporting tools and budget management solutions.



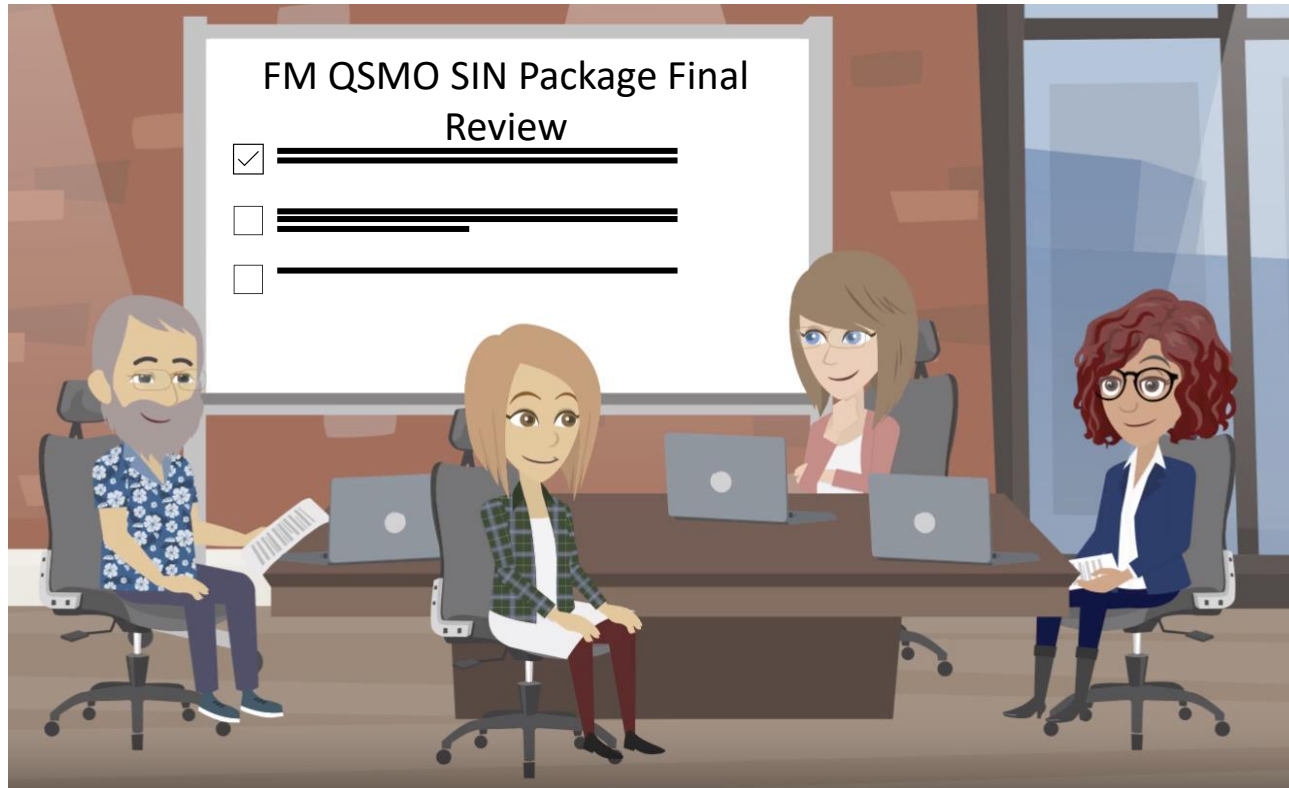
Expanding Awareness

Procurement professionals are joining Marketplace use conversations or reaching out to us directly for information on behalf of their agencies. We are looking for ways to broaden awareness among this community and address their specific questions.



Vendor Quick Tips

We appreciate and encourage the continued interest from the vendor community! When finalizing your package for submission, please consider the tips below.



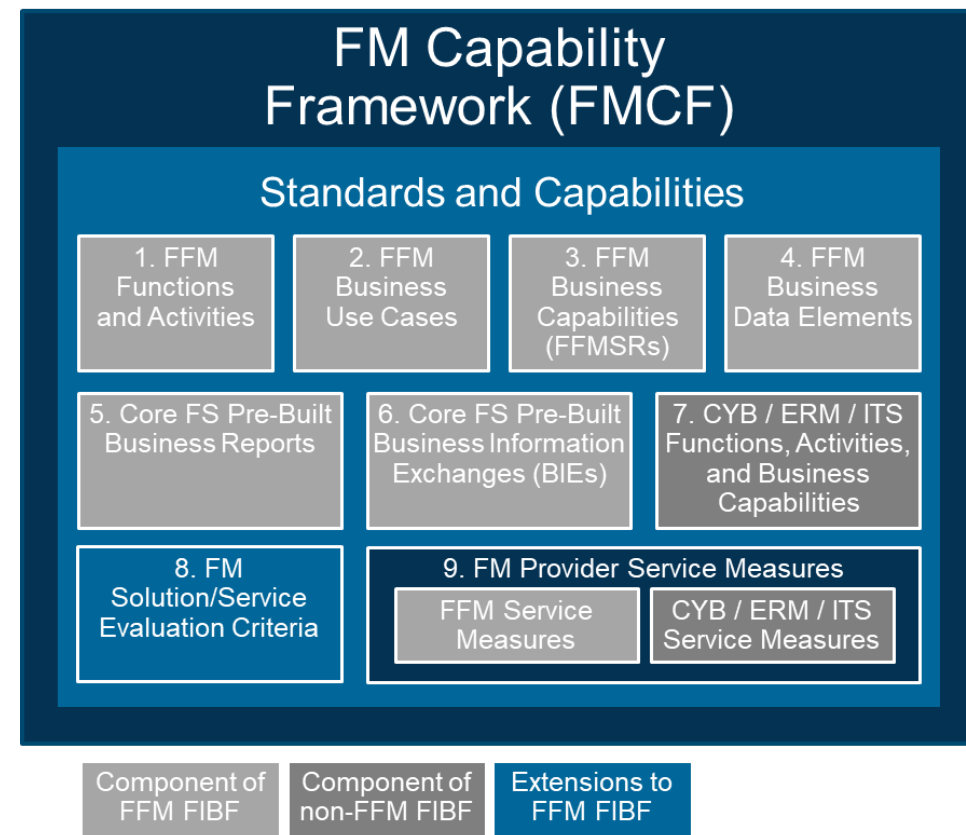
- ✓ Identify document titles, sections, and additional information (e.g., page numbers) needed to locate the specific content applicable to the requested information when providing supporting documentation
- ✓ Submit lengthy or repeated narratives as separate exhibits and reference the exhibit in the template response document
- ✓ Submit materials directly relevant to your proposed offerings to reduce interpretation caused by excess or unorganized materials
- ✓ Provide documents referencing federal agency support experience for additional context when cited in the template
- ✓ Avoid citing capabilities of underlying technology that is not included in the service/solution offering

Standards in the Marketplace

The FMCF defines the baseline needs for solutions and services in the Marketplace. In collaboration with other lines of business, agencies and industry, it is periodically updated to reflect changing policy or other requirements.

The FY 2025 FMCF Updates will focus on the following themes:

- ✓ **Federal Financial Management Authoritative Sources and Guidance Changes from FY23**
- ✓ **Business Use Case Refinement**
- ✓ **Government-wide Systems**
- ✓ **Standards Alignment with Other Lines of Business**

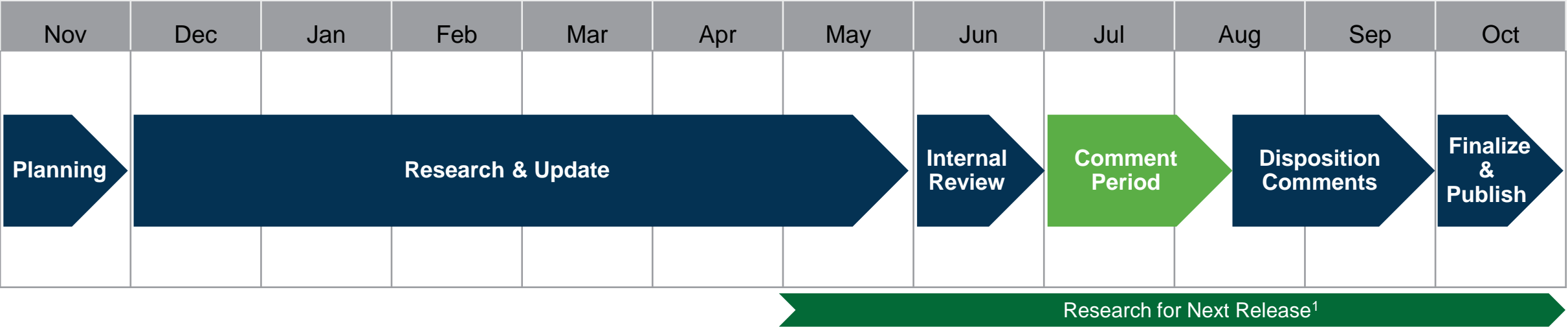


Access the current version of the *FMCF* at:

<https://www.fiscal.treasury.gov/fmqsmo/financial-management-capability-framework.html>

FMCF Annual Update Schedule

Updates to the FMCF are generally released annually and follow the schedule below. We seek feedback from the FM community during the public comment period when proposed updates are posted on Regulations.gov.



FMCF Compliance Requirements

- New vendors onboarding to the marketplace are required to comply with then-current versions of the FMCF
- Existing vendors are required to maintain ongoing compliance with FMCF updates; FM QSMO will provide instructions and work with vendors to validate compliance

¹ Research for future releases, may be also conducted during subsequent phases.

Marketplace Resources for Stakeholders

The **FM QSMO Resources** web page serves as a library for vendors and agencies to find guidance, tips, tools and information about the Marketplace – including:

Vendor Resources

- Vendor Onboarding Training
- SIN 518210FM Vendor Guidance
- Core FS OCD Quick Reference Guide

Agency Readiness and Planning Resources

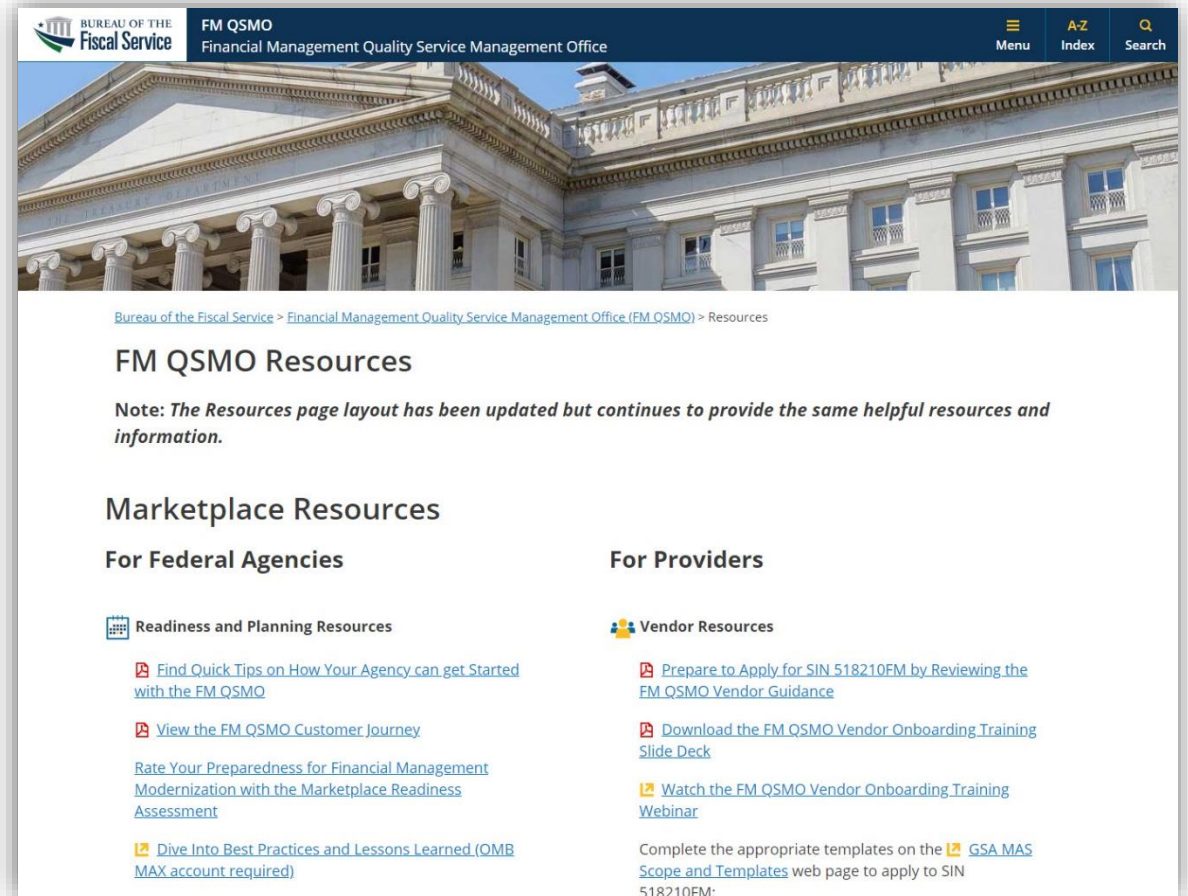
- Guide to the FM QSMO Marketplace
- FM QSMO Customer Journey Map
- How to Obtain Solutions and Services
- Marketplace Offerings at a Glance
- Marketplace Readiness Assessment Tool
- Best Practices and Lessons Learned Repository

Agency Acquisition Resources

- Agency Acquisition Guide
- FM QSMO Marketplace Hub on Acquisition Gateway

Access the *FM QSMO Resources* at:

<https://www.fiscal.treasury.gov/fmqsmo/resources.html>



Stay Connected



Learn

Visit the FM QSMO website for information on the Marketplace and to access helpful resources for both agencies and providers.



<https://www.fiscal.treasury.gov/fmqsmo/>



Explore

Visit the FM QSMO Marketplace Catalog for information on approved providers and available services and solutions.



<https://www.fiscal.treasury.gov/fmqsmo/marketplace-catalog.html>



Connect

Contact the FM QSMO via our webpage. You can request to meet with the FM QSMO, join our mailing list or provide feedback.



<https://www.fiscal.treasury.gov/fmqsmo/contact.html>

Appendix

Agency Guidance on Marketplace Use

The FM QSMO Marketplace should be the first stop early in the planning process for agencies looking to acquire FM solutions and/or services. Agencies are required to consult with the FM QSMO to help connect agency needs to available offerings and assist in determining a path for using the Marketplace.

These requirements are detailed in [OMB Memorandum M-19-16](#), [OMB Circular A-123, Appendix D](#), [OMB Circular A-11](#), and [Investment Planning Guidance](#) released by GSA's Office of Government-wide Policy.

What if an agency doesn't see what it needs in the Marketplace?

- It could be timing; agencies should contact the FM QSMO to ask about new providers and additional offerings in the pipeline

What if the Marketplace still doesn't meet an agency's needs?

- For some FM investments, namely those related to core financial systems, if an agency determines that the Marketplace does not meet its needs, documentation requesting a waiver is required (i.e., Investment Action Plan)
- Agencies will work with the FM QSMO on this documentation; the FM QSMO will coordinate OMB approval
- The documentation will also help identify Marketplace shortfalls and opportunities to expand offerings

