

# **DIA SOURCE SELECTION DESKBOOK**



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## CHAPTER 1 INTRODUCTION

This deskbook contains information on source selection processes and techniques for use in competitive, negotiated acquisitions. Source selection is a process in which requirements, facts, recommendations, and policy relevant to an award decision are examined to award a contract in the way that makes the best sense. Source selection ranges from a simplified process of finding the lowest priced item or service to a structured process using the trade-off processes to select the best value to the taxpayer.

This deskbook provides the format and guidance for writing a source selection plan (SSP). The SSP has two parts. The first part describes the source selection organization (SSO) and its responsibilities. The second part identifies the requirement, the evaluation criteria, and detailed procedures for evaluating the proposal. The source selection authority (SSA) must approve the SSP prior to solicitation release.

The government's objective for all purchases is to obtain the right item or service at the right time, from the right source, at the right price. This is the definition of "best value" in its broadest sense. Addressing the unique circumstances of each acquisition, choosing a contracting method, and the awarding the contract are elements of this process. The deskbook is targeted for all individuals involved in any capacity of a source selection process.

The Federal Acquisition Regulation (FAR), Defense Federal Acquisition Regulation Supplement (DFARS), and Defense Intelligence Agency Regulation Supplement and Instruction (DARSI) govern the acquisition process within DIA.

The FAR is available on line at <http://www.arnet.gov/far/>

The DFARS is available on line at <http://www.acq.osd.mil/dp/dars/dfars.html>

The DARSI is available from  (b)(3):10 USC  
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In the event of conflicting guidance between this document and the FAR or DFARS, the later two control.

A graphic representation of the source selection process is at appendix K.

## CHAPTER 2 -- GETTING STARTED

1. **Procurement integrity and ethics.** The procurement integrity principle requires that all offerors receive fair treatment and that no offeror be provided an unfair advantage. Personnel involved in a source selection are subject to the Procurement Integrity Act (FAR 3.104). This Act and other similar statutes and regulations impose stringent requirements related to safeguarding source selection information and other integrity issues. All participants involved in the source selection process must adhere to these stringent requirements and sign nondisclosure statements. This includes technical and contracting personnel, and any contractors supporting the acquisition. Procurement integrity rules provide for both *civil and criminal penalties* for violations.

Personnel participating personally and substantially in a source selection cannot have financial interest in the process. At the earliest stage of the acquisition, the contracting officer identifies the participating individuals. These individuals must file an OGE Form 450, Confidential Financial Disclosure Report. The Office of General Counsel reviews these forms for potential or actual conflicts of interest. If a conflict of interest is identified, action must be taken to eliminate or mitigate it. See Appendix A for safeguards to ensure the integrity of the source selection. Classified source selection documents must also be marked and protected as required.

2. **Overview.** The acquisition team, a team of functional members or stakeholders, begins with the Acquisition Plan (AP). The AP is the earliest planning stage. The acquisition (AM) or program manager (PM) and technical representatives develop a work statement or statement of objectives. Then members (contracting, AM/PM, other technical representatives, legal counsel, potential evaluation team members e.g., pricing, DCAA, DCMA, and user organizations) complete the SSP.

The Source Selection Organization (SSO) normally consists of the Source Selection Authority (SSA) who makes the contract selection, an optional Source Selection Advisory Council (SSAC) that acts as advisors to the SSA, and a Source Selection Evaluation Board (SSEB) that evaluates offers received. When the SSO operates without a SSAC, the SSEB performs the functions of a SSAC.

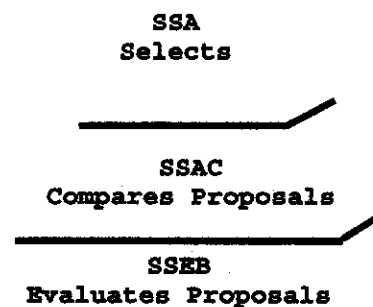
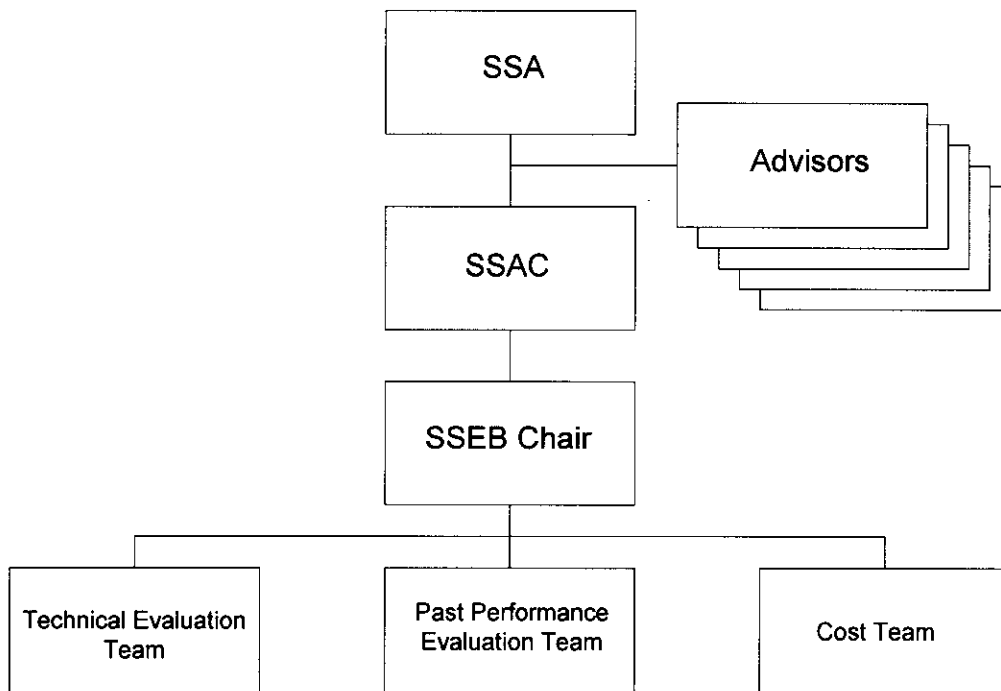


Figure 2-1:  
SSO Responsibilities

### 3. Components of the SSO.

The contracting officer normally serves as the SSA in procurements of less than \$10M. When not serving as the SSA, the contracting officer normally serves as a business advisor to the SSO.

The contracting officer plays a major role in any source selection. The contracting officer serves as the focal point for inquiries from industry, controls all exchanges with offerors, and executes the contract award. Additionally, small business advisors, technical experts, and non-government sources may serve as SSO advisors. Figure 2-2 illustrates the typical SSO.



**Figure 2-2. Typical SSO**

Multiple groups of evaluators comprise the SSEB and are responsible for evaluating specific areas of the proposal against the solicitation requirements.

Senior-level advisors comprise the SSAC and are the link between the SSEB and the SSA.

The skills, expertise, and experience of the people assigned to source selections are the key to success.

The SSA selects the contractor(s) and approach(es) that provides the best value to the government. The SSA must be at a level that is fully accountable for the results of the decision and knows what factors determine the best value. The contracting officer normally serves as the SSA in procurements of at or less than \$10M. The VACA division chief or deputy is designated the SSA for all procurements greater than \$10M and at or less than \$100M. The HCA or deputy is designated the SSA for all procurements greater than \$100M. The HCA may appoint any agency employee to serve as the SSA. Likewise, senior management may choose to participate as an SSA at any level on a case by case basis. The SSA must approve the source selection plan (SSP) before the RFP is released.

When not serving as the SSA, the contracting officer normally serves as a business advisor to the source selection organization (SSO). The contracting officer serves as the focal point for inquiries from industry, controls all exchanges with offerors, and executes the contract award. Additionally, small business advisors, technical experts, and nongovernmental sources may serve as SSO advisors. Everyone one assigned to the source selection organization shall sign a Source Selection Non Disclosure.

The size and composition of the SSO varies depending on the requirement of each acquisition. Whether the team is large or small, structure it to ensure teamwork, unity of purpose, and appropriate open communication among the team members throughout the process. This facilitates a comprehensive evaluation and selection of the proposal that offers the best value to the agency and the taxpayer.

**4. Administrative support considerations.** A successful source selection requires careful planning of the administrative support to the SSO. Each acquisition varies in terms of the administrative support requirements. Adequate facilities, security controls, secure storage space for proposals and work materials, appropriate computer hardware and software with related support, adequate telephones, facsimile machines, and office supplies are some important requirements common to most acquisitions.

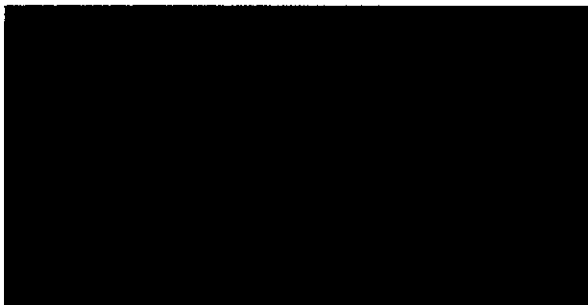
**5. Market research.** An essential part of designing every acquisition strategy is market research. See FAR Part 10. It should be the *first step in any acquisition*. Use market research to obtain information on products and services available in the commercial marketplace to determine if a need may be met by a commercial item or service, and to identify commercial practices associated with such items or services. Market research is the key to choosing the appropriate evaluation factors, contracting method, and the amount and type of information to be included in proposals. Figure 2-3 provides some examples of market research techniques.



- Use general sources of information available from the market place, government sources, and the Internet
- Contact knowledgeable individuals regarding market capabilities and business practices
- Review the results of recent market research
- Publish formal requests for information
- Hold pre-solicitation conferences
- Participate in interactive on-line communication
- Review catalogs and product literature.

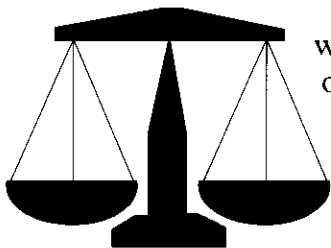
**Figure 2-3: Examples of Market Research Techniques**

**6. Determining the source selection approach.**



One of the early steps to designing an acquisition strategy is to determine the most effective evaluation methodology. For most acquisitions, the tradeoff process is most effective and results in the best value to the government. Use this process when it is in the government's best interest to consider awarding to the offeror with the lowest price. The SSA selects the successful offeror(s) by considering the tradeoffs and applying good

business judgment to determine the proposal that represents the best value.



**a. Best value tradeoff approach.** A tradeoff process is appropriate when it may be in the best interest of the Government to consider award to other than the lowest priced offeror or other than the highest technically rated offeror. When using a tradeoff process, the following apply: (1) All evaluation factors and significant subfactors that will affect contract award and their relative importance shall be clearly stated in the solicitation; and (2) The solicitation shall state whether all evaluation factors other than cost or price, when combined, are significantly more important than, approximately equal to, or significantly less important than cost or price.

This process permits tradeoffs among cost or price and non-cost factors and allows the Government to accept other than the lowest priced proposal. The perceived benefits of the higher priced proposal shall merit the additional cost, and the rationale for tradeoffs must be documented in the file in accordance with FAR 15.406.

**b. Lowest price-technically acceptable (LPTA) approach.** The lowest price technically acceptable source selection process is appropriate when best value is expected to result from selection of the technically acceptable proposal with the lowest evaluated price.

When using the lowest price technically acceptable process, the following apply: (1) the evaluation factors and significant subfactors that establish the requirements of acceptability shall be set forth in the solicitation. Solicitations shall specify that award will be made on the basis of the lowest evaluated price of proposals meeting or exceeding the acceptability standards for non-cost factors; (2) tradeoffs are not permitted; and (3) proposals are evaluated for acceptability but not ranked using the non-cost/price factors.

## CHAPTER 3 THE SOURCE SELECTION PLAN

1. **Purpose.** The source selection plan (SSP) is a vital planning document that describes the proposal evaluation process and selection of the winning offeror(s).

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2. **Format.** DIA uses a standard format for the SSP. A template is provided on the AE Web page at  Use prudent business judgment to tailor the size and detail of the SSP based on the complexity of the acquisition. As a minimum, the SSP will include:

- A description of the requirement
- A description of the SSO, including the duties and responsibilities of each of the key elements
- Planned pre-solicitation activities
- The proposed strategy, including explanation of the contract type and whether multiple awards are anticipated
- The proposed evaluation factors and subfactors, their relative importance, and associated standards
- The proposed evaluation methodology

3. **Accessing the plan.** The plan is source selection information as defined in the FAR Part 3. Do not disclose source selection information to any person not authorized to receive the information. Generally, only the SSO members and personnel from the responsible contracting activity with a need to know are authorized to access the plan. All documents and email exchanges must be identified as source selection sensitive. See appendix I for marking guidelines.

The evaluation factors and significant subfactors become public knowledge as they become part of the solicitation. The contracting officer includes the evaluation factors and subfactors in Section M of the solicitation exactly as they appear in the SSP.

## CHAPTER 4 EVALUATION FACTORS AND SUB-FACTORS, WEIGHTS, RATING SCALES AND STANDARDS

1. **Overview.** Base the award decision on evaluation factors and subfactors tailored to the acquisition. The evaluation factors and subfactors represent the key areas of importance to the government, those areas the offeror(s) must emphasize in the preparation of proposals, and the basis of the source selection decision. Evaluation factors provide the basis for meaningful comparison and discrimination among proposals.

### **Steps in Developing Evaluation Factors and Subfactors:**

- Conduct market research and identify the probable universe of offerors
- Brainstorm critical factors and subfactors
- Identify key discriminators likely to surface in the most advantageous proposals
- Define the discriminators as evaluation factors and subfactors
- Obtain SSA approval of the list of factors and subfactors prior to finalizing the SSP and issuing the solicitation
- When using a draft solicitation, clearly inform offerors of the factors and subfactors and their relative importance
- Assess feedback during pre-solicitation exchanges to determine if the choices are correct
- As necessary, revise the factors and subfactors before issuing the solicitation
- After issuing the solicitation, do not change the factors and subfactors without obtaining the SSA's approval and amending the solicitation and SSP

2. **Mandatory evaluation considerations.** Ensure that the SSP and solicitation clearly state all the evaluation factors and subfactors and their relative importance. Offerors need to understand how their proposals will be evaluated so they can better prepare their proposals and decide how to respond to the solicitation.

Technical representatives from the program office should work closely with the contracting officer in developing the SSP and determining the evaluation factors and subfactors based on user requirements, acquisition objectives, perceived risks, and thorough market research. The team must select only those factors that will differentiate proposals. Limit the factors and subfactors to those areas expected to reveal measurable differences or risk levels among the proposals. Do not include factors for which the government cannot objectively demonstrate relevance—for which the government is indifferent, e.g., if early delivery would result in no benefit to the government, then delivery prior to the required delivery date should not be identified as a factor or at least ranked low in relative importance and only used to discriminate between proposals that are *identical* in all more important factors.

Develop specific technical factors for each acquisition, taking into consideration the objectives and requirements of the acquisition. These factors are the discriminators most likely to reveal substantive differences in technical approaches or risk levels among competing proposals. However, too many factors and subfactors may lead to a leveling of ratings. Strive to

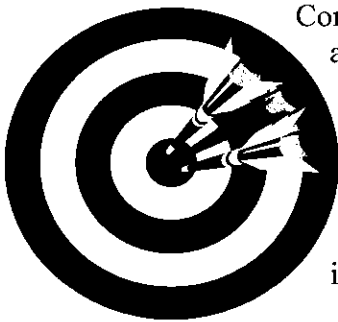
select a limited number of evaluation factors and subfactors, *since more is not necessarily better* and extends the evaluation process.

Choose an evaluation factor only if the requirements warrant a comparative evaluation of that area. One way to assess a potential evaluation factor is to ask, “Will superiority in this factor provide value to the government and is the government willing to possibly pay more for that superiority?”

a. **Cost Factors.** The *Competition in Contracting Act*, as implemented in the FAR, requires that price be included as an evaluation factor in every source selection. The SSP and solicitation must both reflect the relative importance of the evaluation factors. The FAR requires that the solicitation state, as a minimum, whether all evaluation factors other than price, when combined, are:

- Significantly more important than cost or price
- Approximately equal to cost or price
- Significantly less important than cost or price

Cost realism plays an important role in many source selections. Cost realism analysis is the process of independently reviewing and evaluating specific elements of each offeror’s proposed cost estimate to determine whether the estimated proposed cost elements are realistic for the work to be performed; reflect a clear understanding of the requirements, and are consistent with the unique methods of performance and materials described in the offeror’s technical proposal. It is very important that Section L specify the information to be evaluated.



Consider cost realism when a cost reimbursement type contract is anticipated. Under a cost type contract, the proposed cost estimates may not be valid indicators of actual final costs to the government. A cost realism analysis is performed and used to determine the most probable cost of performance for each offeror. Selection decisions should be based on the most probable cost estimate. Significant differences between proposed and most probable costs may indicate increased performance risks.

Cost realism may be considered for fixed price incentive contracts or in exceptional cases, for other fixed price type contracts. However, proposed fixed prices are not adjusted for cost realism during the evaluation. Cost realism may be useful in determining if any proposed prices are unrealistically high or low which would indicate that the offeror’s effort to lock in future contracts with a “buy in” or that the offeror does not understand the requirement. The lack of understanding may be a significant risk to performance. One method used to deal with the lack of cost realism is to assign an increased risk rating.

When offerors are not required to bid on every task area, cost evaluations may be determined as a variance from the independent government cost estimate. The solicitation must clearly state which costs will be evaluated and how the cost factor will be assessed.

b. **Past performance.** Past performance is not the same as contractor experience. How a contractor performed on previous contracts must be included as an evaluation factor in competitively negotiated acquisitions for each acquisition in excess of \$1,000,000\* for services and information technology (\*see DARS Reference ‘Guide to Contractor Performance Information’ for the latest categories and thresholds), unless the contracting officer documents the contract file why it would not be appropriate for that acquisition.

A thorough evaluation of past performance, to include information that is not submitted in proposals, ensures that awards are made to good performers rather than to just good proposal writers. Mandatory elements for past performance include:

- **Quality of product or service** - Assess the contractor’s conformance to contract requirements, specifications, and standards of good workmanship (e.g., commonly accepted technical, professional, environmental, or safety and health standards)
- **Schedule** - Assess the timeliness of the contractor in completing the contract, task orders, milestones, delivery schedules, administrative requirements (e.g., efforts that contribute to or effect the schedule variance)
- **Cost Control** - Assess the contractor’s effectiveness in forecasting, managing, and controlling contract cost—not required for firm fixed price or firm fixed price with economic price adjustment contracts
- **Business Relations** - Assess the integration and coordination of all activities needed to execute the contract, specifically the timeliness, completeness and quality of problem identification, corrective action plans, proposal submittals, the contractor’s history of reasonable and cooperative behavior, customer satisfaction, timely award and management of subcontracts, and whether the contractor met small/small disadvantaged and women-owned business participation goals
- **Management of Key Personnel** - Assess the contractor’s performance in selecting, retaining, supporting, and replacing key personnel when necessary—only for services and information technology business sectors.

c. **Quality.** The FAR requires that the quality of the product or service be addressed in every source selection through consideration of one or more non-cost evaluation factors. In addition to the requirement to address past performance, other non-cost evaluation factors include compliance with solicitation requirements, technical excellence, management capability, and prior experience.

d. **Small Disadvantaged Businesses.** The extent of participation of small disadvantaged business concerns in performance of the contract shall be evaluated in unrestricted acquisitions expected to exceed \$550,000 (\$1,000,000 for construction) subject to certain limitations in FAR Subpart 19.1202-2.

e. **Bundling.** For solicitations involving bundling that offer a significant opportunity for subcontracting, the contracting officer must include a factor to evaluate past performance indicating the extent to which the offeror attained applicable goals for small business participation under contracts that required subcontracting plans. See *FAR Subparts 7.1, 10.001, 19.000, and 19.2* for additional guidance.

3. **Weighting the factors and subfactors.** Avoid using numerical weighting (i.e., assigning points or percentages to evaluation factors and subfactors) for expressing the relative importance of evaluation factors. Evaluation factors and subfactors must be definable in readily understood qualitative terms, e.g., color-coding, and represent the key areas of importance to be considered in the source selection process. The key is the consistency with which the selected method is applied to all competing proposals and the adequacy of the narrative used to support the ratings.

Use priority statements to express the relative importance of the evaluation factors and subfactors. Priority statements relate one evaluation factor or subfactor to each of the other evaluation factors or subfactors.

4. **Rating scales.** When using the tradeoff process, evaluate the non-cost portions of the proposal, associated performance, and proposal risks using a rating scale. This scale must be included in the SSP. The success of an evaluation is not so dependent upon the type of scale used, but rather the consistency with which the evaluators use it. For this reason, the scale must include definitions for each rating to provide the evaluators with a common understanding of how to apply them.

a. **Proposal merit rating scales.** Develop rating scales for the evaluators to use in assessing the merit of the proposals in respect to the evaluation factors and subfactors. Figure 4-1 is an example of a rating scale.

Color	Technical Capability	Strengths	Weaknesses	Past Performance
Blue	The proposal exceeds requirements and clearly demonstrates the offeror's capability to deliver exceptional performance.	There are numerous strengths that are of direct benefit to the government.	Weaknesses are considered insignificant and have no apparent impact to the program.	Highly relevant/very recent past performance in all identified past performance efforts. Excellent performance ratings.
Green	The proposal is satisfactory; the offeror is capable of meeting performance requirements.	Some strengths exist that are of benefit to the Government. The strengths clearly offset weaknesses.	A few weaknesses exist; they are correctable with minimal government oversight or direction.	Relevant/somewhat recent past performance in all identified past performance efforts. Acceptable performance ratings.
Yellow	The proposal is minimally adequate. The offeror is most likely able to meet performance requirements.	A few strengths exist that are of benefit to the government. The strengths do not offset the weaknesses.	Substantial weaknesses exist that may impact the program. They are correctable with some government oversight and direction.	Somewhat relevant/not very recent past performance. Mostly acceptable performance ratings.
Orange	The proposal is inadequate. It is doubtful whether the offeror can meet performance requirements.	Little, if any, strengths exist that are of benefit to the government. The weaknesses clearly offset the strengths.	Weaknesses exist that adversely impact the program. They are only correctable with significant government oversight and direction.	Little relevant past performance identified. Mostly unacceptable performance ratings.
Red	The proposal is highly inadequate; the offeror cannot meet performance requirements.	There are no beneficial strengths.	Numerous weaknesses exist that are so significant that a proposal re-write is not feasible within a suitable timeframe.	Little relevant past performance identified. Almost all performance ratings are unacceptable.
White	Not used	Not used	Not used	Completely lacks relevant performance history or past performance is unavailable, not due offeror's failure to provide information.

**Figure 4-1: Sample "Color Code" Rating Table**

Both the government and contractor want to keep risk at a level that is appropriate and acceptable for the given acquisition. There are two types of non-cost risks: performance risk and proposal risk.

**b. Performance risk rating scales.** Performance risk analysis provides insight into an offeror's probability of successfully completing the solicitation requirements based on the offeror's performance record on similar contract efforts. Assess risk through evaluation of the offeror's past performance.



c. **Proposal risk rating scales.** Evaluators assess and document the risks associated with an offeror's proposed approach.

5. **Applicability to “go-no go” and “meets minimum requirement” evaluation factor.** When using the tradeoff process, the government may elect to evaluate one or more of the factors on a “go-no go” or “meets minimum requirement” basis.

a. **“Go-no go” evaluation factors are pass-fail evaluation factors.** A proposal must either satisfy the evaluation factor or be ineligible for contract award.

b. **“Meets minimum requirement” evaluation factors.** These factors establish a minimum rating that a proposal must receive. If the proposal does not receive this rating, it is ineligible for contract award. Unlike “go-no go” evaluation factors, a rating scale must be established for this type of evaluation factor. The difference between minimum required evaluation factors and the “go-no go” evaluation factors is that a proposal can receive credit for exceeding the minimum required threshold. For example, assume the minimum required threshold is a “good” rating. If a proposal receives an “unacceptable” rating, it will be ineligible for award. If it receives a good rating, it is eligible for award, but receives no additional credit. If it receives an “excellent” rating, it is eligible for award and will receive additional credit. Use caution when deciding to use a “go-no go” or “meets minimum requirement” evaluation factor. Use of such a factor may result in an otherwise advantageous proposal being excluded from the competition if it fails to meet or satisfy one of these factors or the minimum threshold.

6. **Applicability to price evaluation.** Rating scales are not appropriate for price evaluations. Use a risk factor associated with the contractor's ability to perform at the proposed cost or price. For cost-type contracts, use cost realism based on the contractor's proposal for tradeoffs between cost and other factors in determining best value. The independent government cost estimate may be used as a comparative measure when assessing cost realism.

7. **Evaluation Standards.** Evaluators must be able to determine the relative merit of each proposal with respect to the evaluation factors. Evaluation standards provide guides to help evaluators measure how well a proposal addresses each factor and subfactor. Standards permit the evaluation of each proposal against a uniform objective baseline. Standards also promote consistency in the evaluation by ensuring that the evaluators evaluate each proposal against the same baseline:

- Develop standards concurrent to evaluation factors and subfactor.
- Develop a narrative for each standard that specifies a target performance level that the proposal must achieve to meet the requirements of the factor or subfactor and the solicitation requirements.
- Develop guidelines for higher or lower ratings compared to the target standard.

Avoid the use of overly general standards as it makes consensus among evaluators more difficult to obtain and may obscure the differences between proposals.

Define a standard so that mere inclusion of a topic in an offeror's proposal does not result in a determination that the proposal meets the standard. Use either quantitative standards or qualitative standards in source selections. The standards, as part of the source selection methodology, are part of the source selection plan. As an example, if the evaluation factor states:

“The offeror's software modification approach will be evaluated relative to the modified software's ability to accommodate open architecture, tracking accuracy, and reliability.”

Then the evaluation standard would state:

“The standard is met if (1) the offeror's approach is sound, reflects understanding of the system specification and solicitation requirements, and (2) the modified software meets a certain cited level or higher.”

**8. Accompanying narratives.** Use narratives in conjunction with a rating system to indicate a proposal's strengths, weaknesses, and risks. Ratings must be supported with narrative statements. Narrative statements describe the proposal's relative strengths, weaknesses, and risks to the SSA in a way that ratings alone cannot. A narrative is required when applying evaluation standards, when comparing proposals, and when conducting a cost or technical tradeoff. The narrative provides a reasonable and rational basis for the selection decision.

## CHAPTER 5 DRAFTING THE SOURCE SELECTION PLAN

Vital to any source selection process is a thorough plan to select the best value. Tailor the plan to reflect the complexity of each acquisition. The plan requires the SSA's approval prior to solicitation release.



**The SSP contains source selection sensitive information that must be marked and treated in accordance with FAR Part 3 and must not be released outside the source selection organization.**

**The Source selection plan (SSP).** Common sections to the SSP include:

- **Introduction:** Contains a brief description of the acquisition
- **Source selection organization (SSO):** Includes representatives from appropriate functional areas such as contracting, technical, legal counsel, program management, user organizations, the SSAC members, SSEB members, and any other participating boards or workgroups
- **Proposed pre-solicitation activities:** Contains a description of the activities preceding the release of the solicitation, to include market surveys, acquisition strategy meetings, acquisition plan, draft solicitations, synopsis, and solicitation review panels
- **Evaluation procedures:** Includes descriptions of how proposals will be evaluated and rated including how dissenting evaluator views are documented and dealt with, a description of the independent government cost estimate development to include any cost drivers, and a description of how those cost drivers will be evaluated
- **Evaluation factors:** Include a description of the proposed evaluation factors and subfactors, their relative importance, and associated evaluation standards; a description of the evaluation process to be used (i.e., lowest price technically acceptable, tradeoff, or hybrid), oral presentations, and rating system. If cost realism is a requirement, develop an outline of the government's process for formulating the best estimate of the total cost. Separately identify items that could have a sufficient cost impact to warrant special consideration, and identify items that represent non-quantifiable cost risks. Include the proposed independent cost analysis (ICA), most probable cost (MPC), and lifecycle cost (LCC) estimates. State the importance ranking of price to other factors
- **Acquisition Strategy:** Includes the proposed contract type and contemplated incentives and disincentives

