

Source Selection

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- The process the Government uses to choose a contractor from a competitive field of offerors
- Structured to provide offerors fair and equitable opportunity to receive a contract award
- Regulated by Federal Acquisition Regulation (FAR) parts 14 (for sealed bidding) and 15 (for negotiated contracting), as well as department regulation supplements and local procedures.

What is “Source Selection”?

Sealed Bidding

Generally not used by NAVAIR for hardware/services

“Best Value”

Award not necessarily to lowest priced offer

Differing approaches/solutions to Government requirements may have benefit/value

Tradeoff analysis is required to determine which offer represents the best value, all factors considered

Lowest Cost, Technically Acceptable

Drawings

Commercial Items


No “variation” in approach or value to be derived from differences

* New DoD Source Selection Procedures of 31 March 2016 distinguishes between “Subjective Tradeoff” and “Value Adjusted Total Evaluated Price (VATEP) Tradeoff”.

Types of Source Selection

- Source Selection Plan developed and approved by Government
- Solicitation issued.
 - Section L defines the requirements for the contents of submitted offers.
 - Section M defines the Evaluation Criteria and Relative Order of Importance of the Criteria.
- Offers Received and Evaluated
- Selection Decision/Award made on Initial Offers, OR:
- Competitive Range Established
- Discussions Conducted
- Final Proposal Revisions Received
- Final Offers Evaluated
- Selection Decision Made
- Contract Award

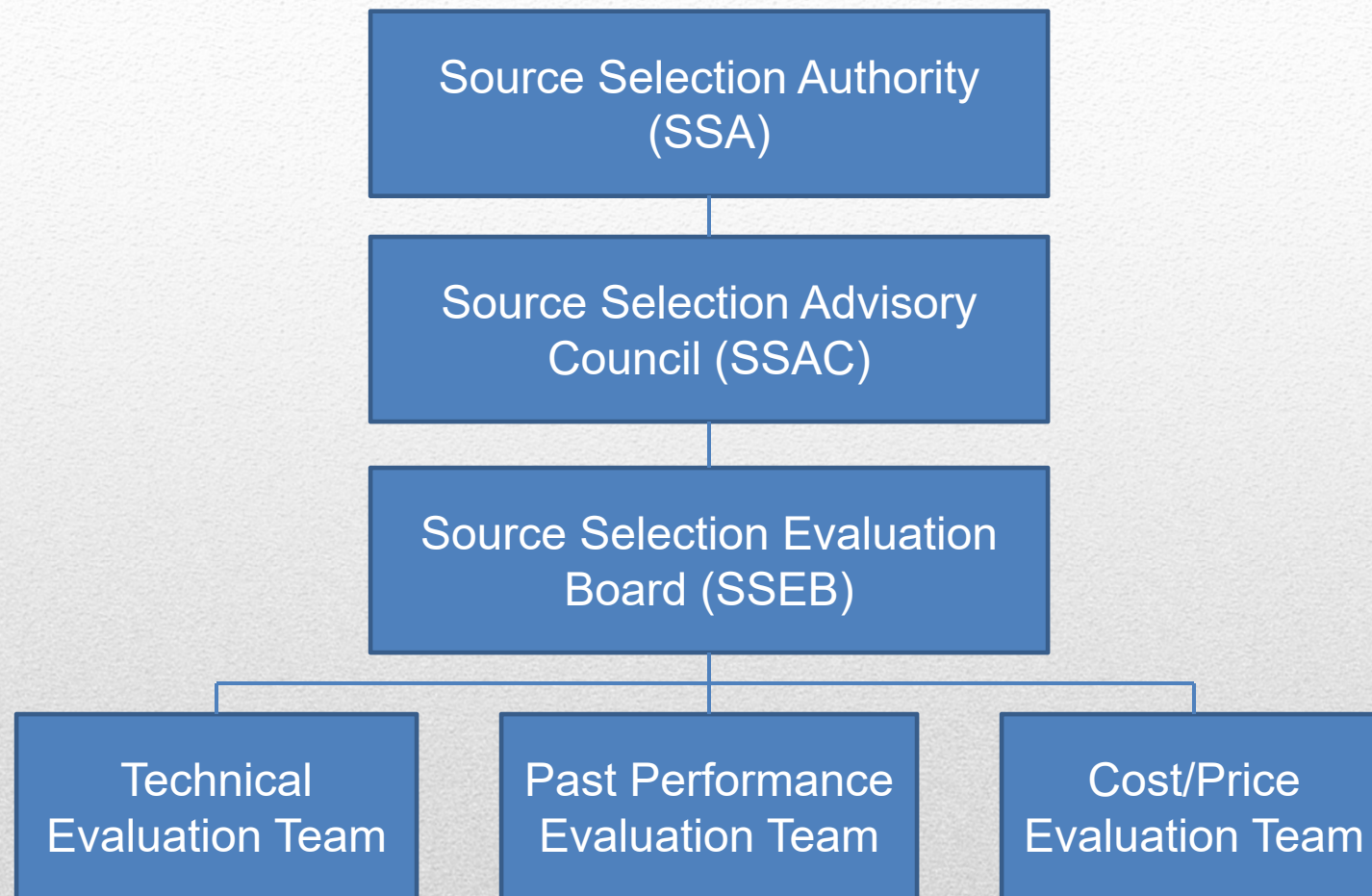
Source Selection Process



Technical Personnel with Subject Matter Expertise
Contracting Personnel
Cost and Price Analysts
Small Business Specialists
with advice from
Legal Counsel
DCMA/DCAA

In extremely limited circumstances, Contractor Support Personnel may be included in evaluations of proposals, but in general that is avoided. Notification will be contained in the solicitation should contractor personnel be performing evaluations.

Who Performs Evaluations?



Structure of Evaluation Teams

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- Evaluation Teams are established to examine each criterion (i.e. Technical Evaluation Team, Past Performance Evaluation Team, Cost/Price Evaluation Team)
- Evaluators examine each offer in comparison with the stated evaluation criteria (Section M).
- Individual evaluations are compiled and a consensus is reached by the individual team as to the rating given.
- Evaluations are then forwarded to the SSEB or SSAC for the tradeoff analysis (comparison of one proposal to another) and recommendation to the SSA
- SSA independently reviews documentation and determines the source selection

How is Evaluation Performed?

- LPTA – Acceptable/Unacceptable ratings are assigned for Technical and/or Past Performance
- Best Value
 - Technical: Adjectival Ratings of Outstanding, Good, Acceptable, Marginal, or Unacceptable.
 - May include an evaluation of risk within the technical rating (Combined Technical/Risk Rating method), or may address Risk separately with Low, Moderate, High or Unacceptable ratings.
 - Past Performance: Relevancy and Performance Confidence Assessments are utilized.
 - Relevancy (Very Relevant, Relevant, Somewhat Relevant, Not Relevant) addresses how similar the cited contract is to the proposal effort
 - Performance Confidence (Substantial, Satisfactory, Neutral, Limited, No Confidence) addresses how confident the Government is, based on the performance record, that performance will be successful on the proposal effort

Evaluation Ratings

- **Small Business Evaluation**
 - Adjectival Ratings (Outstanding, Good, Acceptable, Marginal, Unacceptable), OR Acceptable/Unacceptable.
 - May be stand-alone evaluation factor or subfactor under technical
- **Weaknesses, Deficiencies**
 - Deficiency – Failure to meet government requirement or a combination of significant weaknesses/unacceptable risk
 - Significant Weakness – Flaw that appreciably increases risk of unsuccessful performance
 - Weakness – Flaw in proposal that increases risk of unsuccessful performance
 - Proposals with Deficiencies or Unacceptable Risk Ratings are Unawardable

Evaluation Ratings (Continued)

- In most solicitations, the Government anticipates awarding on Initial Offers
 - Award on Initial Offers means no Discussions are conducted with anyone.
 - Offerors should ALWAYS submit the best offer they can with their initial submission.
 - Attention to Section L Proposal Submission Requirements is key.
- At least one acceptable offer (no deficiencies, acceptable level of risk, cost/price can be determined fair and reasonable)
- Government always reserves right to conduct discussions

Award on Initial Offer

- Clarifications are limited exchanges with offerors that may occur before awarding on initial offers.
 - Allow offerors to clarify certain aspects of proposals (e.g. the relevance of an offeror's past performance information and adverse past performance information to which the offeror has not previously had an opportunity to respond) or to resolve minor clerical errors.
- Communications are exchanges with offerors that assist in the determination of the Competitive Range (prior to opening discussions).
 - Limited to offerors whose past performance information is the determining factor preventing them from being placed within the competitive range (same information as for clarification), and can only be held with offerors whose placement in the competitive range is uncertain.
 - Can be conducted to enhance understanding of the proposals and facilitate evaluation
 - CANNOT be used to cure proposal weaknesses or deficiencies or make material changes to the proposal

Clarifications/Communications

- Prior to opening discussions
- Comprised of the most highly rated proposals
- FAR 15.306(c)(2) provides that the Contracting Officer may “...limit the number of proposals in the competitive range to the greatest number that will permit an efficient competition among the most highly rated proposals.”
- Offerors excluded from the competitive range are notified and have the opportunity to request a Debriefing.

Competitive Range

- Conducted with all offerors determined to be in the Competitive Range
- Notify offerors of all deficiencies, significant weaknesses, and adverse past performance information to which the offeror has not yet had an opportunity to respond
- May include other aspects of the proposal that could be altered to explained to materially enhance the proposal's potential for award
- Contracting officer is NOT required to discuss every area where the proposal could be improved
- If an offer is determined during discussions that it is no longer within the Competitive Range it may be eliminated from the competition and notified.
- At the conclusion of discussions, offerors are notified that discussions are closed and a final proposal revision is requested with a common cutoff date and time.

Discussions

- Whenever a proposal is excluded from the competition a notification must be sent to the offeror as soon as practicable.
 - Proposal submission – if a proposal is determined to be non-responsive (has not been submitted in accordance with the proposal instructions and/or is late)
 - Exclusion from the Competitive Range
 - States basis for determination
 - Proposal revision will not be considered
 - Instructions included for requesting a debrief
 - Not Selected for Award
 - Within three days of contract award
 - Includes number of offers solicited, number of proposals received, name and address of offeror(s) receiving an award
 - Items, quantities, any stated unit prices of each award or total awarded contract price
 - In general terms, reason offeror's proposal was not selected
 - Instructions included for requesting a debrief

Notifications to Unsuccessful Offerors

- **Preaward Debriefings**

- Request in writing within 3 days of receipt of notice of exclusion from the competition.
- Debriefing may be delayed until after award, but if the request is not timely submitted, the offeror need not be given either a preaward or postaward debriefing.
- Only entitled to one debriefing
- Includes:
 - Agency's evaluation of significant elements in the offeror's proposal
 - Summary of rationale for eliminating offer from competition
 - Reasonable responses to relevant questions regarding procedures
- Does not include:
 - Number of offerors
 - Identity of other offerors
 - Content of other offerors' proposals
 - Ranking of other offerors
 - Evaluation of other offerors
 - Prohibited information (see far 15.506(e))

Debriefings - Preaward

- Written request within 3 days after the date that the offeror has received notification of contract award.
- Should occur within 5 days after the contracting officer receives the written request (to maximum extent practicable)
- Untimely debriefing requests may or may not be accommodated, and accommodation does not automatically extend protest filing deadlines
- Shall include:
 - Evaluation of significant weaknesses or deficiencies in proposal
 - Overall evaluated cost/price and technical rating, if applicable, of the successful and debriefed offerors, and past performance information of the debriefed offer
 - Overall ranking of offerors if a ranking was utilized by the agency
 - Summary of rationale for award
 - For commercial items, make/model of successful offeror unit
 - Reasonable responses to relevant questions about procedures
- Shall not include:
 - Point-by-point comparisons of debriefed offeror's proposal with other offerors' proposals.
 - Information prohibited from disclosure or exempt from release under FOIA

Debriefings – Post Award

- Source Selection process should be defined in the solicitation and followed during the evaluation
- Tailored criteria to include appropriate discriminators to allow for determination of best value
- Use LPTA where appropriate
- Discussions need to be meaningful
- Debriefings should be a source of information for the offerors to improve proposals for the next submission
- Ensure you “put your best foot forward” when submitting the proposal
- Do not hesitate to contact the contracting officer if you have any questions regarding proposal submission, evaluation criteria, or any other aspect of the solicitation

Summary