

RFP Workshop

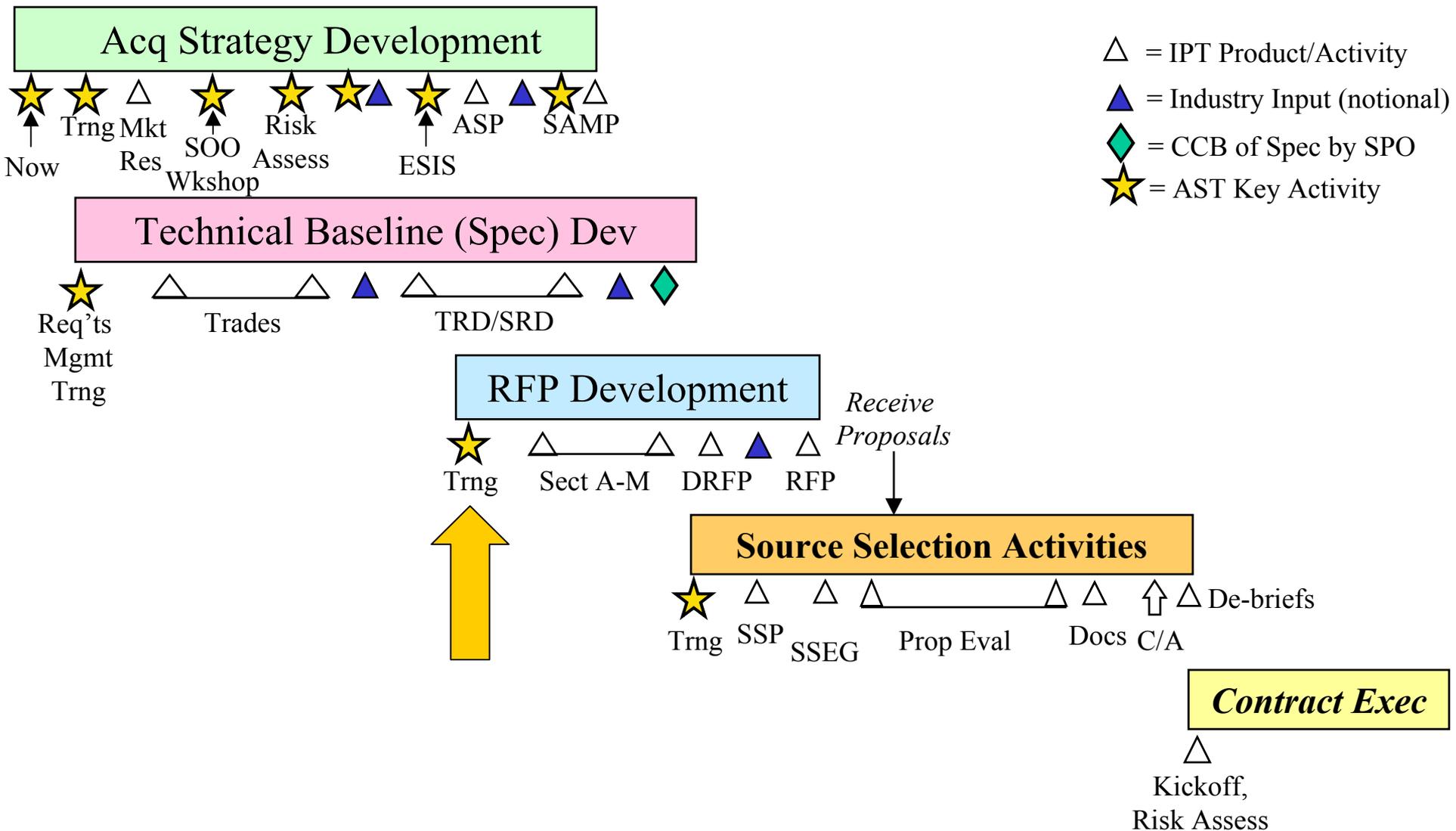


12 Oct 2003

Agenda

- **Overview**
- **L & M Development**
- **Evaluation Process**
- **Lessons Learned from Recent RFPs**
- **3 RFP “Potholes” to Avoid**
- **Brief Workshop Exercise**

Pre-Award Process (Top-Level)



Source Selection Factors

Mandatory

- **Mission Capability (MC)**

Programmatic, Performance, and Business Aspects

- **Proposal Risk (PR)**

Indicator of an Offeror's ability to execute the program within the proposed cost schedule, and performance baselines

- **Past Performance**

Historical evidence of recent and relevant contract performance

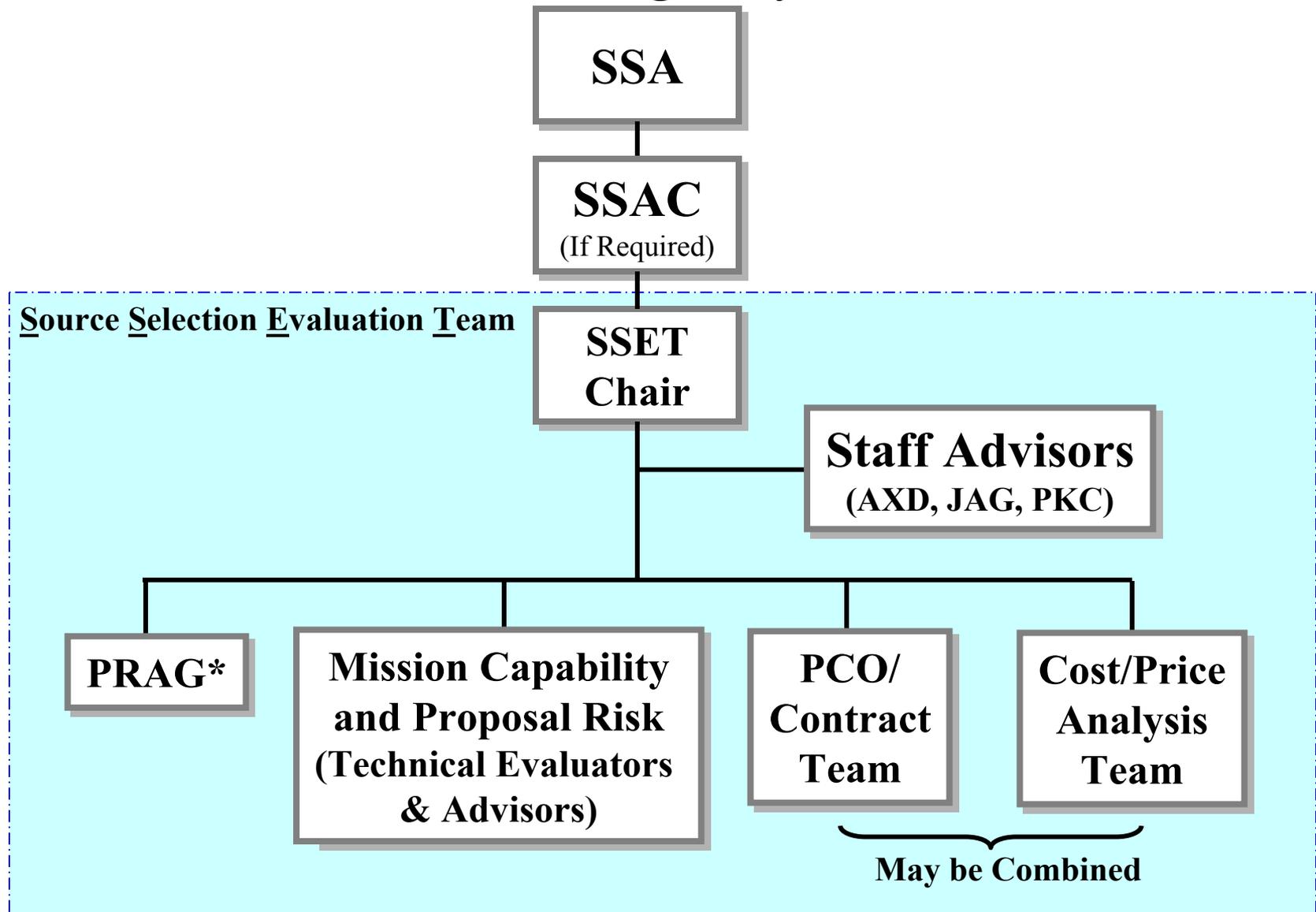
- **Price/Cost**

Most likely cost to the Government to perform proposed effort at contract completion

Each Factor uses a different evaluation process and set of definitions

Source Selection Organization

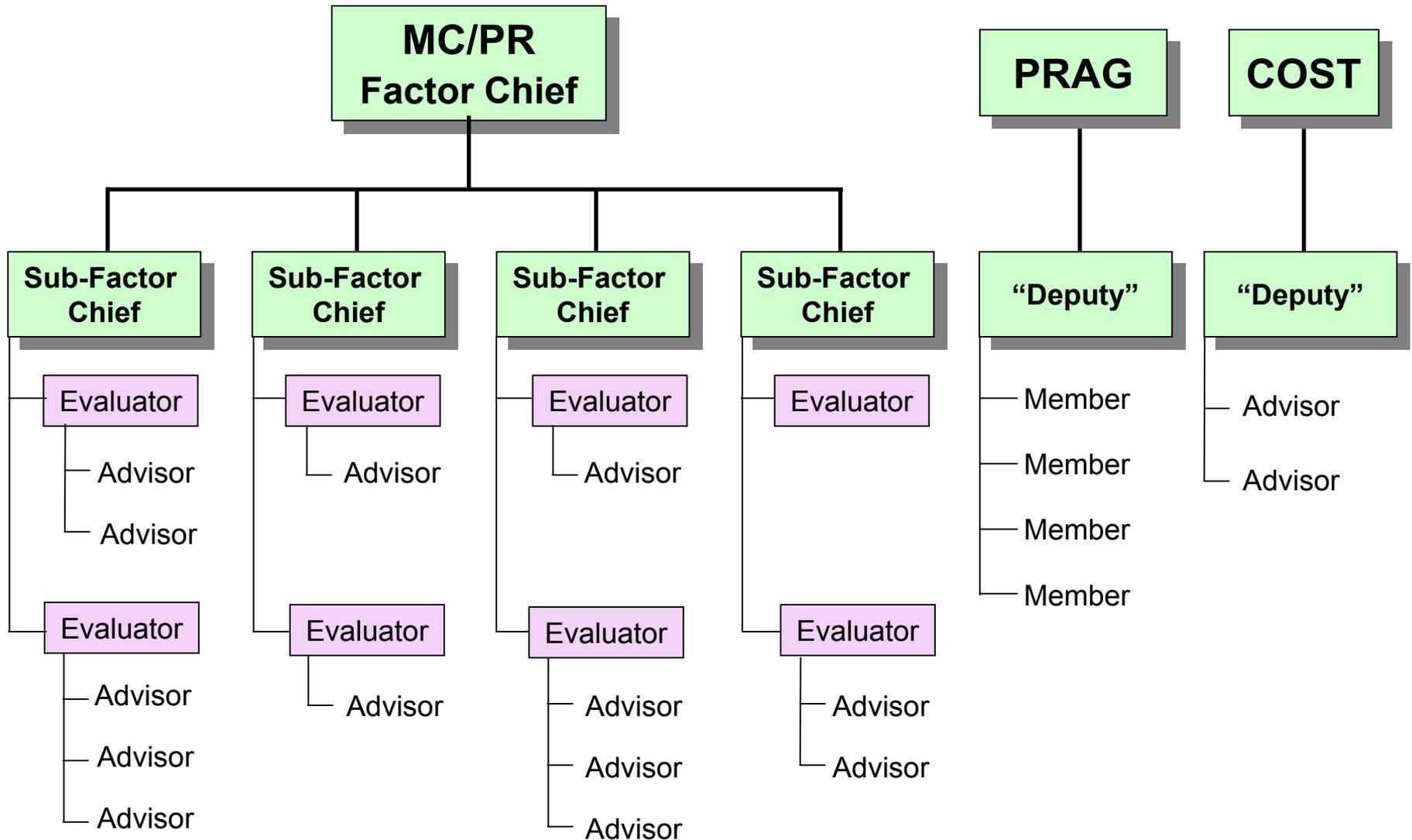
Median And Agency Procedures



* Use of PRAG to evaluate Performance Confidence is optional for Median Acquisitions

Factor Teams Organization

“Typical”



Assigning Evaluators & Advisors

“Access to offeror proposals must be restricted to only those portions for which the advisor’s expertise is required in the evaluation.” (5315.303-90 (g) (1))

		Evaluators and Advisors							
		Sam	Jim	Shelia	Phillis	Bob	Bill	Harry	Linda
Eval or Adv?		E	A	A	E	A	E	E	A
Sub-Factor 1									
	Criterion a	P	A	A					
	Criterion b		P	A					
	Criterion c	P		A					
	Criterion d				P	A			
	Criterion e				P	A			
	Criterion f			P	A	A			
	Criterion g						P	A	
	Criterion h							P	A
	Criterion I						A	P	
		Phil	Dave	Steve	John	Bob	Stephanie		
Eval or Adv?		E	A	E	A	E	A		
Sub-Factor 2									
	Criterion a	P	A						
	Criterion b	P	A						
	Criterion c			P	A				
	Criterion d			P	A				
	Criterion e					P	A		
	Criterion f					P	A		

This approach can ensure that all criteria are fully covered

MC/PR Evaluators and Advisors

- **Advisors (Government & Non-Government):**
 - Non-Government advisors can be FFRDC or Contractor personnel approved in the Source Selection Plan (SSP)
- **Evaluators and Advisors:**
 - Contractor personnel cannot be evaluators except by SPD approval * (determination and approval not required for FFRDC)
 - FFRDC may be MC/PR evaluators and PRAG advisors (but not PRAG members!)
 - Do not determine final ratings or assign rankings of proposal
- **Staff Advisors:**
 - AXD, PKC, JAG, Aerospace personnel from SMC staff that review products and provide advice to source selection teams

** = SAF/AQX Interim Policy Letter, 19 Jul 96, and Amendment, 26 Aug 96;
Subject: Acquiring and Using Advisory & Assistance Services.*

Sections L & M Development

“Typical” RFP Contents

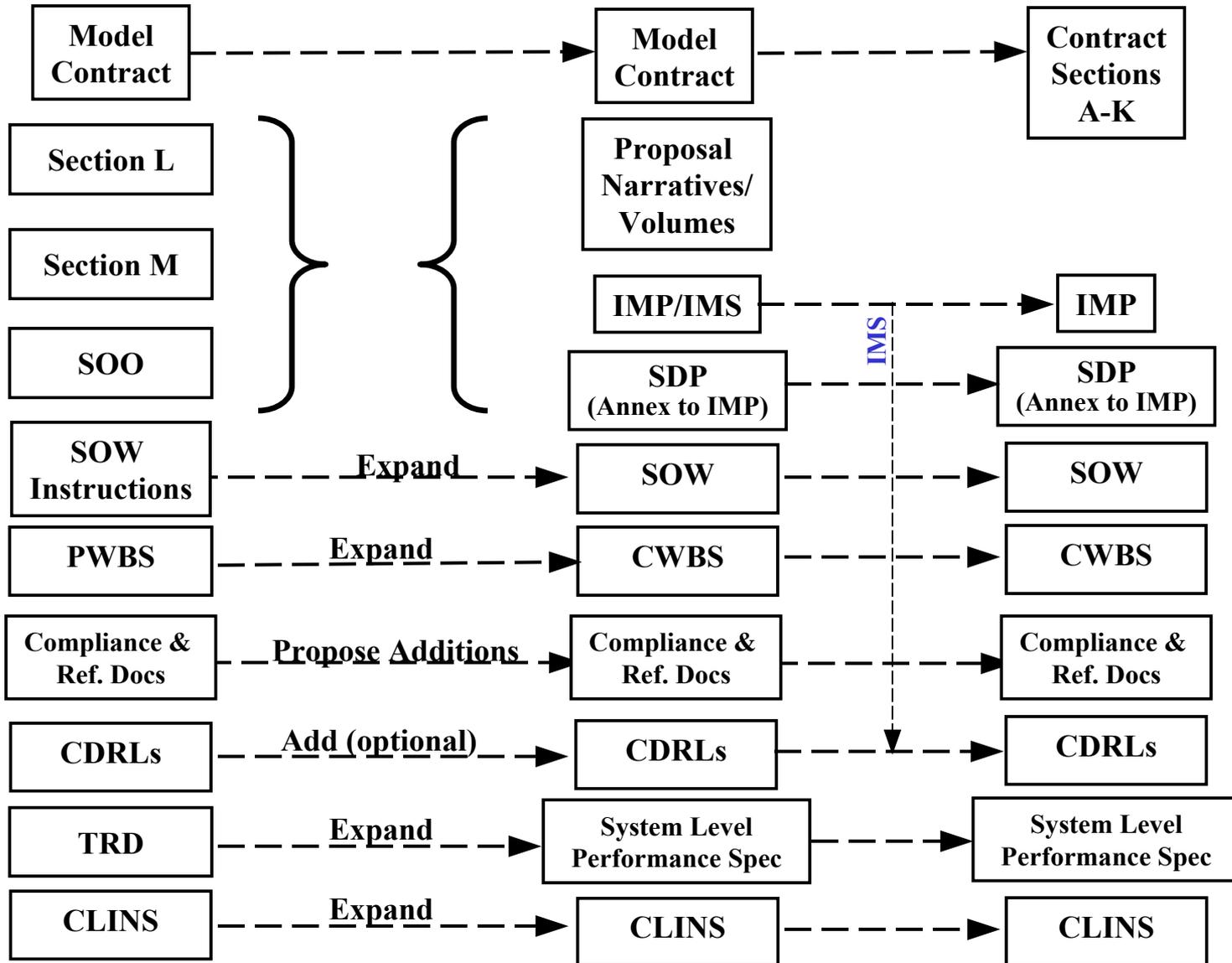
- **PART I - Schedule**
 - **A Solicitation/contract form**
 - **B Supplies or services & prices/costs**
 - **C Description/specifications/work statement**
 - **D Packaging & marking**
 - **E Inspection & acceptance**
 - **F Deliveries or performance**
 - **G Contract administration data**
 - **H Special contract requirements**
- **PART II - Contract Clauses (I)**
- **PART III - List of Documents & attachments (J)**
- **PART IV - Representations & instructions**
 - **K Reps & certs**
 - **L Instruction, conditions, and notices to offerors**
 - **M Evaluation factors for award**

Document Linkage

Provided in RFP

Provided in Proposal

On Contract at Award



Rationale

AFMC Section M Guide (para. 3-2a):

- **“The basic philosophy behind risk management is to identify those risks that pose the most serious threat to program success and focus management attention on them. In source selections, this means focusing on the critical risks in developing Mission Capability sub-factors.”**

AFFARS 5315.304 (b)(2):

- **“Factors and sub-factors must be limited to those that are real discriminators. Evaluation factors, sub-factors, and elementsmust include only those specified program characteristics that are significant enough to have an impact on the source selection decision, such as those identified through program risk analysis...”**

Process “Objectives”

- Stay focused on true discriminators, keep the fodder out
- Use “Top down “ approach to filter fodder
- Get buy in from team (and industry) using slides, before writing text
- Use the process to keep team focused (refer back to process and risks during reviews of drafts)
- Resist “writer’s anxiety” (i.e., Don’t start writing until the time is right)

Basic Approach Overview

- Identify top 10-15 risks based on program specifics
- Group them logically into 4-6 sub-factors (no more than 6)
- Develop detailed outline of Section L/M (M first)
 - Sub-bullets listing key attributes of each sub-factor
 - Attributes must again be filtered to remain focused on discriminators
- Host Industry Day to discuss Outline with potential offerors, if schedule permits
- Write Section M (Evaluation Factors) and L (proposal content, format, etc.)
 - Same person/small team should write both Section L and M for a given topic or set of “attributes”
 - A proven approach: Give set of topics to subject matter “team” of 3-4 people. After drafting L&M sections, team members review/revise each other’s work before review by entire IPT.
- Compare Section L and M Drafts with original outline and revise as needed to retain original focus

Detailed Process for Defining Sub-factors/Discriminators

1. Review top 10-15 items from Risk List

- If Risk Assessment was not done or was inadequate, do “Quickie RA”
- If risks are generic (i.e. “schedule”), then peel the onion to find the real risk

➔ *IF services or sustainment contract (i.e., “process focus”): Start by listing critical processes, then identify risk items within processes, not the overall process itself.*

2. Group risks in “Logical Pairs” to get 6 (or fewer) Groups

- Try to maintain specific items in sub-factor titles (e.g., Interoperability and Interfaces)
- Avoid generic categories if possible (e.g., System Engineering)
- Each group becomes a MC sub-factor

3. Check to see that all Key Performance Parameters (KPPs) and thresholds and objectives from ORD are covered by above sub-factors

Defining Sub-factors/Discriminators

4. Reach preliminary consensus within Team on relative importance of factors and MC sub-factors **(Revisit later!)**
5. Brainstorm attributes of each sub-factor separately with key players (2-5 knowledgeable people per sub-factor)
 - Capture attributes and criteria as bullets on PowerPoint slides in outline form for further discussion
 - First indentation = Attributes. What things do you want to evaluate within sub-factor? Why? Do you expect this to be a real discriminator?
 - Second/Third indentation = Evaluation Criteria. What would make this attribute Green or Blue? (See “Wire Brush” questions?)
6. ****** If time permits, review your Detailed Outline with industry before drafting text
 - Best Practice: Brief industry on the Detailed Outline and solicit feedback -- do not ask offerors to interpret them without explanation

Defining Sub-factors/Discriminators

7. Identify author teams for each sub-factor to actually write text (2-3 persons on each sub-factor team)
 - Provide authors:
 - (1) Example for Section L and Section M language,
 - (2) Table of contents with paragraph numbering and
 - (3) Format instructions for RFP Draft (font, margins, para. numbers, etc.)
 - Explain that Attributes from slides are basis of Section L and Criteria from slides are basis for Section M

8. Review each sub-factor team's drafts of Section L and M separately
 - Use original outline slides as guide for reviewing drafts for consistency
 - Check Section L Draft against Outline Slides for each sub-factor
 - Then, Check Section M against Section L to ensure evaluation criteria cover what is asked for
 - Cross-check Section M against Outline Slide(s) for consistency

Defining Sub-factors/Discriminators

9. Revisit overall importance of factors and sub-factors and provide relative importance information to offerors
10. Address price/cost instructions to see if they are consistent
11. Address Past Performance relevance and performance (after sub-factors are defined) to ensure consistency and accuracy
12. Integrate Sections L and M with rest of RFP and check other appropriate sections (B, H, I) for applicable information and for consistency
13. Distribute for staff, then contractor review

“Wire Brush Questions”

Questions to ask during attribute & criteria development:

- Is this truly a discriminator? Is it necessary for proposal completeness? Will it help me select the best Offeror?
- What are the attributes of a “successful approach” for this criteria/sub-factor?
- What’s the difference between a good approach and a bad one?
- What kind of approach would not meet requirement?
- Do we expect to get different kinds of proposal responses from the potential offerors or will they all be the same (textbook) answer? (especially relevant for “process” criteria)
- Can the offeror exceed our criteria? How? Is it clear to the Offeror?
- Is there benefit to the Government of a response that exceeds our requirement/criteria? Is it clear to the Offeror?

Example/Sample

Program X Technical Risks -- First “List”

- Enhanced Battery Life
- Anti-jam Implementation (acquisition/track and direction finder)
- Interfaces and protocols
- Software design, code, test
- Backward compatibility
- Security chip (tech & mgmt) approach
- Packaging constraints vs. performance req'ts
- Graphical User Interface (GUI) & Human Factors
- “Self Check” implementation (integrity)
- P3I Strategy
- New signal format incorporation strategy
- Reducing potential for ECPs
- Accessories

Other Program X Risks

Potential risks (from Initial Brainstorming):

- Prog Management, IPT structure, subcontract mgmt, teaming arrangements, production capacity, IMP/IMS,
- LCC ??? (or wait until next phase ??)
- Manufacturing
- Production capacity/capability
- Product integration (subs vs. prime)

Program X Evaluation Sub-Factors

- 1. Security chip (tech & mgmt) approach
 - 2. Software design, code, test
 - “Self Check” implementation
 - 3. Interfaces and protocols with ...
 - Backward compatibility
 - 4. Anti-jam implementation
 - 5. Human factors
 - Size and weight, GUI
 - 6. Product integration and planning (subs vs. prime)
 - IPT structure, subcontractor. mgmt, teaming arrange., IMP/IMS, etc.
 - Production capacity/capability (+ parts obsolescence)
 - Cost drivers (unit price, O&S)
- Two items “paired”*
- Two items “paired”*
- Several items “paired”*

Sub-factor Outline (Example)

- **Anti-jam Implementation**

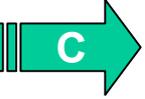
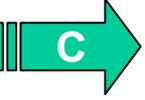
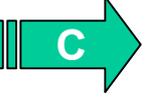
- Implementation method and why selected  **Attribute**
 - Performance against types, # and power of jammers
 - Maturity of design/method, plan to mature  **Criterion**
- AJ capability vs. power usage and size trade offs
 - Less power/size is better,
 - Thoroughness of trade off analysis (assumptions, criteria, results)
- Testing/Analysis completed (results) and planned
 - Realistic assumptions/set up, post analysis results or plan
 - Analysis, Simulation, Testing (mixture is expected, testing is best)
- “Direction to a jammer” capability/approach
 - Ease of use (min. operator intervention), (tech order instructions)
 - Accuracy (spec level they will sign up to and why)
- Capability internal vs. accessory
 - More internal is better, weight/size/capability of accessory
- Risk Mitigation Plan(s) for A-J

Example Section M Sub-Factor & Criteria

- **M 2.0 Evaluation Factors**
- **M 2.1 Factor 1 – Mission Capability**
- **M 2.1.6 Sub-factor 6 – Product Integration and Planning**

(Brief paragraph describing what this subfactor will address, i.e., SOO, IMP, IMS,etc.)

The requirements are met when:

-  – The offeror identifies all team members and describes how each team member will enhance overall product development by amplifying the prime's capabilities.
-  – The offeror's progress toward defining teaming arrangements supports the product development and production schedules.
-  – The offeror fully identifies all critical subcontracts and arrangements, and defines appropriate contingency plans for the loss of critical team members.

(Note: This section may also contain additional criteria for the other attributes within this sub-factor.)

Process Keys -- Summary

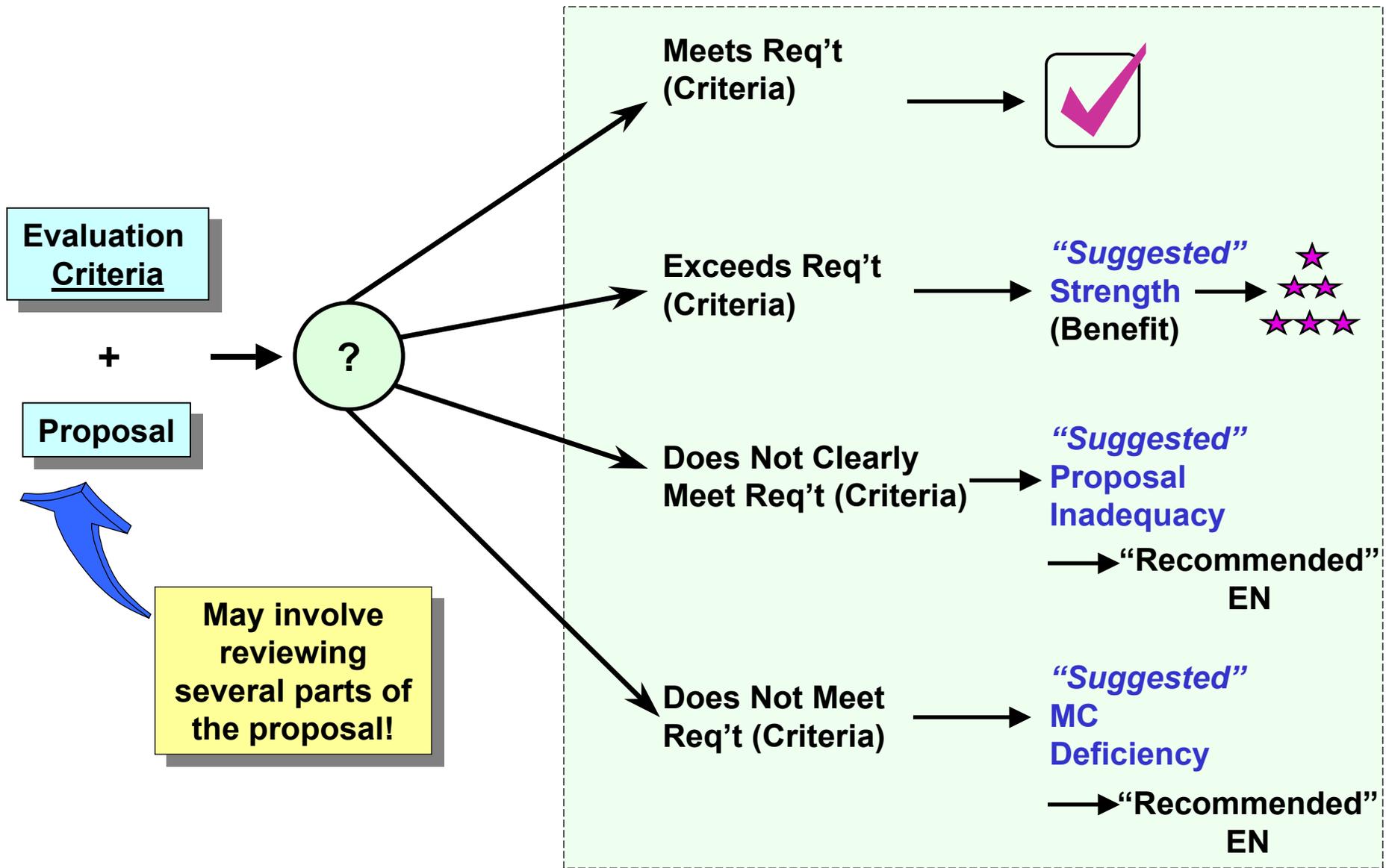
- Stay focused on discriminators – get these in first!
- Don't let all the technical parameters get combined into one or two sub-factors since it dilutes each requirement
- If you must address processes, focus on the risks of individual processes and “peel the onion” to find the real risk area
- Use “Top down “ approach to stay focused and avoid fodder
- Define basic Attributes and Criteria in outline form
- Get buy in from team (and industry) using basic Outline, before writing text
- Use the process to keep team focused (refer back to process and risks during reviews of drafts)
- Resist “writer's anxiety”

Don't write until the time is right!

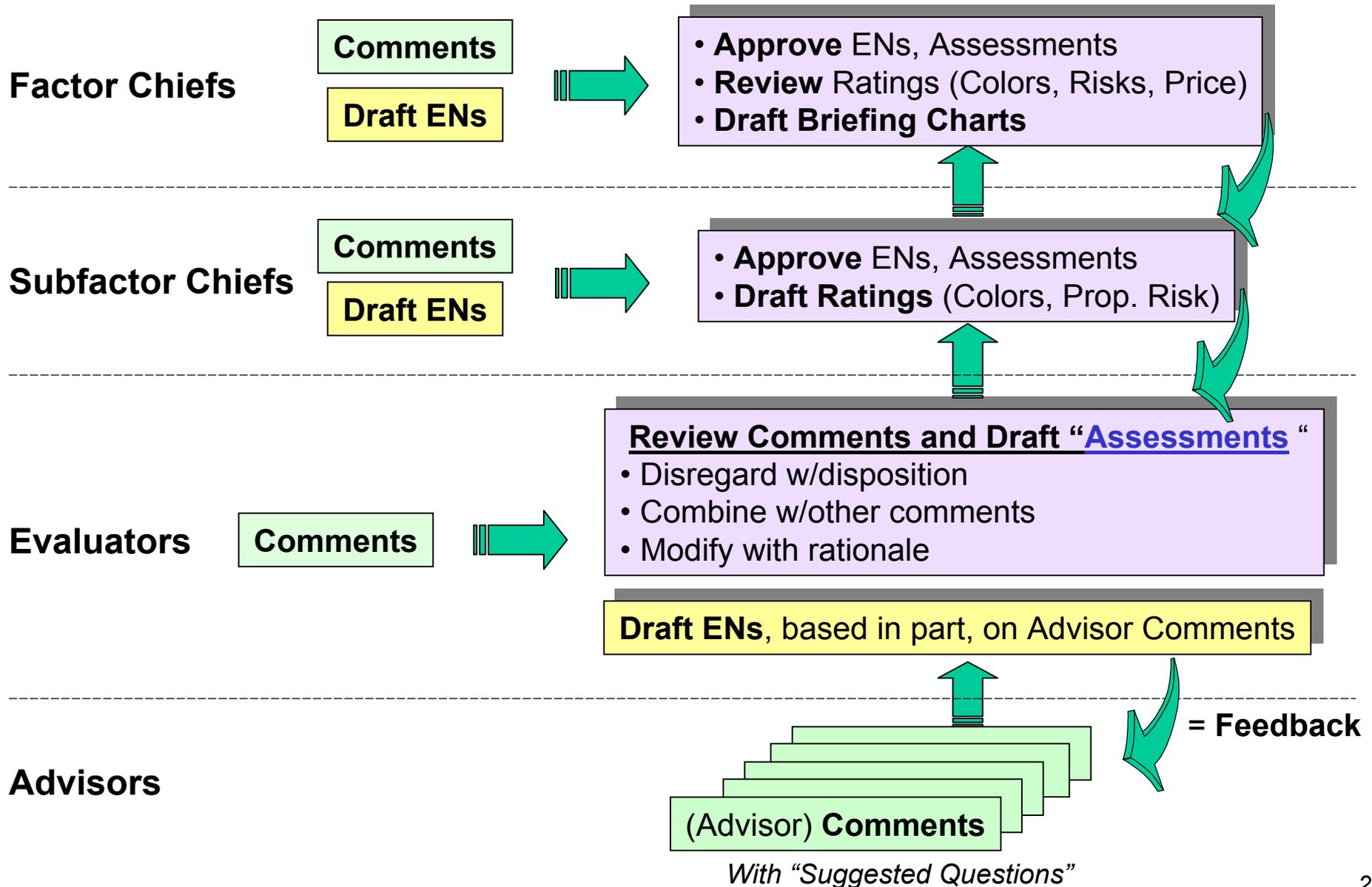
Evaluation Process

“Thought Process” for MC

Advisor Recommendations via “Comments”



“Rollup”



MISSION CAPABILITY RATINGS

AFFARS 5315.305(a)(3)

MISSION CAPABILITY					
HC	C	C	SC	C	C
PROPOSAL RISK					
L	H	M	M	M	L
CONFIDENCE					
PRICE OR COST					
\$PRICE / \$PC					

EXCEPTIONAL

EXCEEDS specified minimum performance or capability ***REQUIREMENTS*** in a way ***BENEFICIAL*** to the Air Force

ACCEPTABLE

MEETS specified minimum performance or capability ***REQUIREMENTS*** necessary for acceptable contract performance

MARGINAL

DOES NOT CLEARLY MEET some specified minimum performance or capability ***REQUIREMENTS***, but any proposal inadequacies are correctable

UNACCEPTABLE

FAILS TO MEET specified minimum performance or capability ***REQUIREMENTS***. Proposals with an unacceptable rating are **NOT AWARDABLE**

Proposal Risk (PR)

Proposal Risk Assessment Defined

AFFARS 5315.305 (a)(3)(ii)

“**Proposal risk assessment** focuses on the risks and weaknesses associated with an offeror’s proposed approach. Assessment of risk is done at the sub-factor (or element, if used) level, and includes potential for disruption of schedule, increased cost, degradation of performance and the need for increased Government oversight as well as the likelihood of unsuccessful contract performance. For any risk identified, the evaluation must address the offeror’s proposal for mitigating those risks and why that approach is or is not manageable....” *[emphasis added]*

Proposal Risk Recommendations

- **Section M:** Use the paragraph in the AFMC Section M Template and Guide
 - Very carefully worded to capture the process and criteria
- **Section L:** Request “mitigation plans” for each applicable sub-factor whether you identify risks or not
 - We have sample paragraph to insert at end of each Section L Sub-Factor description
- **Section L:** Request description of risk management process/plan as part of IMP Narratives -- not in MC Volume
 - More details about IMP/IMS in our IMP/IMS Workshop

Proposal Risk Ratings

AFFARS 5315.305(a)(3)(ii)

- **High**

Likely to cause significant disruption of schedule, increased cost or degradation of performance. Risk may be unacceptable even with special contractor emphasis and close Government monitoring

- **Moderate**

Can potentially cause some disruption of schedule, increased cost, or degradation of performance. Special contractor emphasis and close Government monitoring will probably be able to overcome difficulties

- **Low**

Has little potential to cause disruption of schedule, increased cost or degradation of performance Normal contractor effort and normal Government monitoring will probably be able to overcome difficulties

MC & PR: THE DIFFERENCES ^b

	MISSION CAPABILITY	PROPOSAL RISK
FOCUS	DOES THE PROMISED PERFORMANCE MEET <i>THE SOLICITATION REQUIREMENTS</i> ?	WHAT ARE <i>THE RISKS</i> OF MEETING SOLICITATION RQMTS IF PERFORMED AS PROMISED?
ISSUE	WHAT IS <i>QUALITY OF PERFORMANCE-BASED OUTCOME</i> ?	WHAT RISKS ARE INHERENT IN OFFEROR'S <i>APPROACH</i> ?
ASSESSMENT	(MEETS) STRENGTH PROPOSAL INADEQUACY <i>MC</i> DEFICIENCY	(NO WEAKNESSES) WEAKNESS SIGNIFICANT WEAKNESS <i>PR</i> DEFICIENCY
RATING	BLUE GREEN YELLOW RED	LOW MODERATE HIGH

Past Performance (PRAG) and Price

PRAG Roles and Responsibilities

- Membership: (AFFARS 5315.303-90(e))
 - Experienced Government-only personnel
 - FFRDC can be Advisors
 - Appointed by PRAG chairperson
- Duties: (AFFARS 5315.305(a)(2))
 - Evaluate recent, current & relevant past performance of each offeror
 - Assess Performance Confidence at Subfactor level and assign rating at the Factor level for each proposal
 - Recommend overall Past Performance Confidence rating, if requested by SSA

PRAG Organization

- Select the PRAG Chief when RFP development starts
- Don't select the PRAG members until the MC Sub-factors are “stable”
 - MC sub-factors => Past Performance sub-factors
 - Don't spend a lot of time developing PRAG Relevancy Criteria for sub-factors that are likely to change
 - Once selected PRAG members should be capable of spending full time developing the past performance portions of the RFP
 - May need to borrow a MC/PR evaluator to interpret technical issues

Best Practice: Use our process to define relevancy criteria, performance evaluation criteria & proposal requirements

Cost Team Roles and Responsibilities

- **Cost/Price Factor Chief & Analysis Team**
 - Evaluate cost/price volume to determine price reasonableness and cost realism, if applicable
 - Uses separate processes, definitions and ground rules
 - Entire SSET can have access to cost information

Cost/Price Definitions

(FAR 15.305(a)(i))

- **Cost/Price Reasonableness**

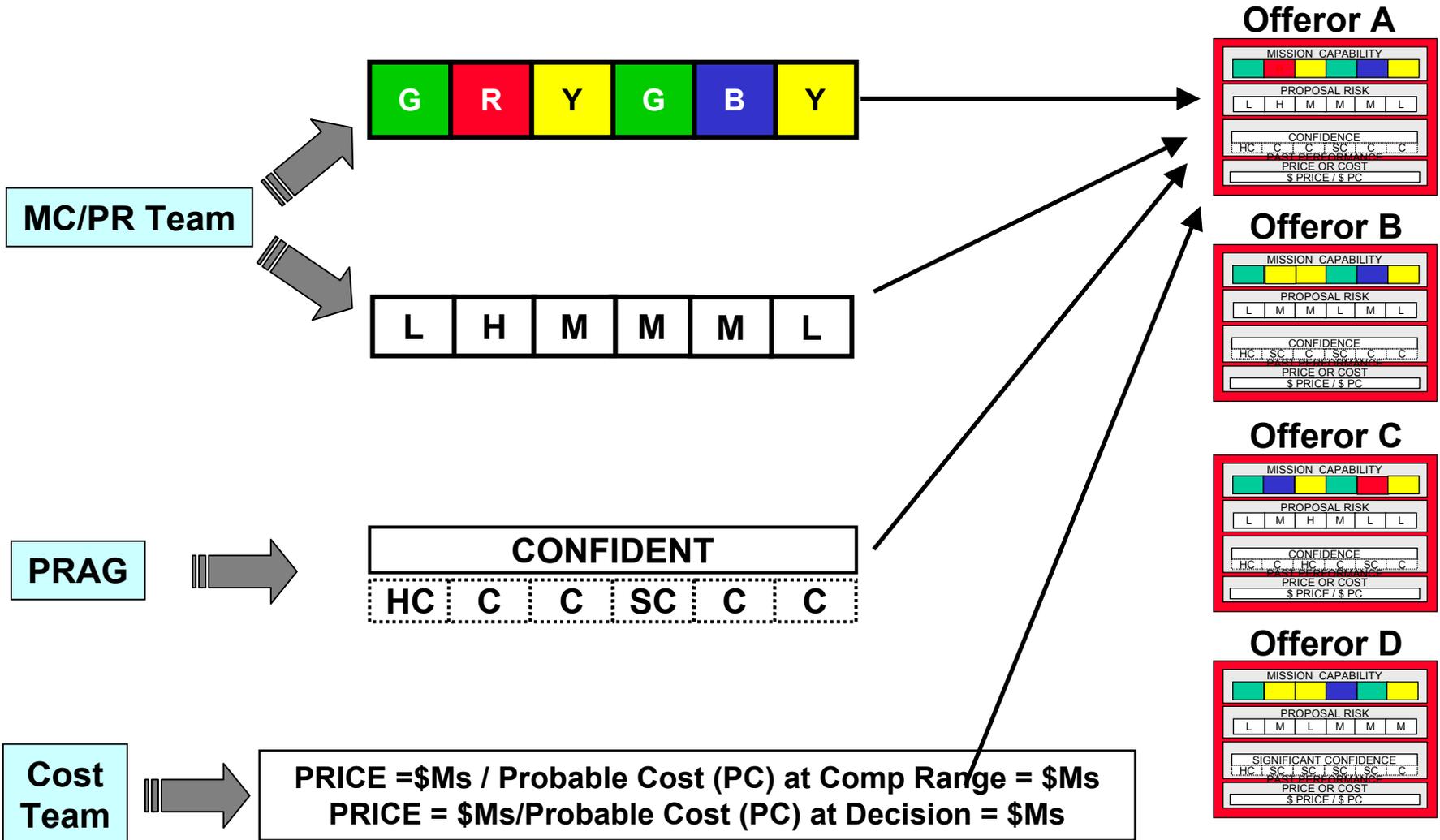
Normally evaluated and assessed under price competition; may also be determined by other price analysis techniques such as parametric analysis

- **Cost Realism**

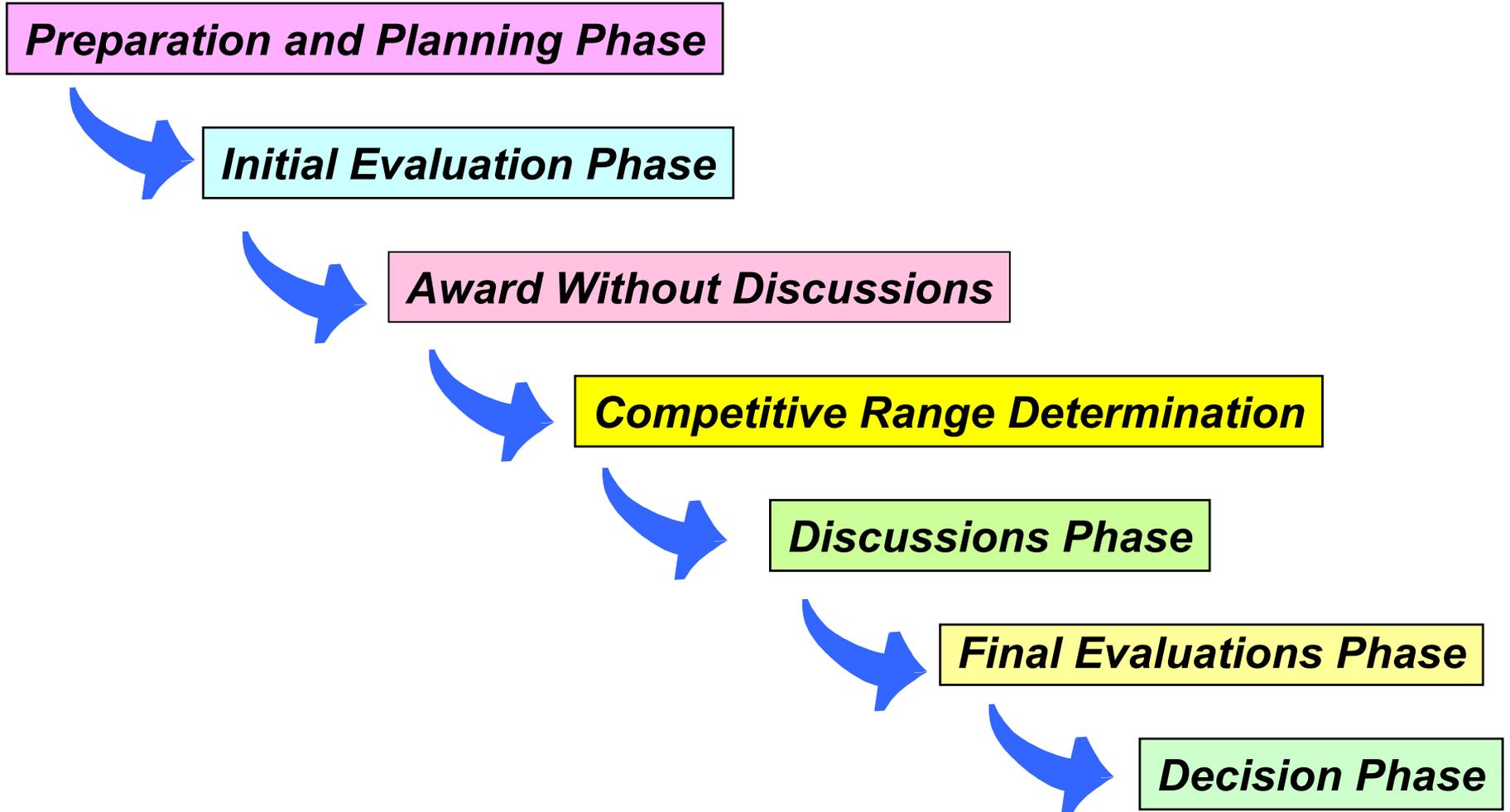
Required for cost-reimbursement contracts, an assessment that proposed price appropriately considers scope and degree of effort. As elected by PCO, may be considered for other contract types such as FPIF

Integrating the Ratings

Core Team: SSET Chair, Factor Chiefs, Sub-Factor Chiefs, PCO, Recorder (admin)



Source Selection Process Overview



Initial Evaluation -- MC/PR

- **Good evaluation criteria are the keys to successful evaluations!**
 - Basis for initial evaluation: DOES NOT MEET, DOES NOT CLEARLY MEET, MEETS, or EXCEEDS requirement/criteria
- **You must evaluate proposal vs Section M -- and only Section M**
 - May not evaluate what you think requirement should be
 - Evaluators should review and understand evaluation criteria before Source Selection starts
 - Some Section M criteria may be Pass/Fail
- **Can't compare proposal with one another**

LESSONS LEARNED

RFP Lessons Learned (pg 1)

- General or “flexible” evaluation criteria
 - **Impact: Hard to determine that criteria are met or exceeded**
- Too many criteria or attributes within each sub-factor
 - **Impact: Real discriminators get “watered down” or “overshadowed”**
- Trying to evaluate processes as individual criterion
 - **Impact: Offeror can’t exceed requirement, proposal is often text book answer**
- Too many “thresholds and objectives”
 - **Impact: Offerors don’t know where to focus “marginal dollars” to achieve real benefit to government**
- Not asking for risk mitigation plans for each (*applicable*) sub-factor
 - **Impact: Difficult to assess proposal risk by sub-factor**

RFP Lessons Learned (pg 2)

- Underestimating effort to define past performance RFP or conduct PRAG evaluation
 - **Impact: Poor RFP instructions, evaluation not justified and/or not enough time to complete evaluation**
- Not asking detailed, written questions before Industry Days and/or not requesting detailed answers
 - **Impact: Team assumes contractors will address unstated concerns and that contractor silence = agreement**
 - **Best Practice: Brainstorm team “concerns,” send them to the offeror well before Industry Days, and ask offerors to discuss answers during one-on-ones**
- Not including adequate admin requirements or formats
 - **Impact: Allows offerors to game amount of data in proposal**

RFP Lessons Learned (pg 3)

- Not determining depth of analysis planned for IMS
 - Impact: Inappropriate RFP instructions and/or analysis support not available/planned (SETA or Aerospace)
- Not having a single person or small team look across all RFP documents to ensure consistency
 - Impact: Offerors not sure what to propose where. Disconnects can cause confusion during evaluation. Not handling disconnects may prevent evaluating what you really wanted
- Not adequately defining media or software for proposal
 - Impact: Makes evaluators spend additional time manipulating data in ESS Tool
 - **Best Practice: Allow offerors to bring in disks and test with tool and network to ensure compatibility and ease of use**

3 RFP “Potholes” to Avoid

- **Confusing risk definitions**
- **Problems with evaluating processes**
- **Problems with unfocused criteria**

Risk Definitions in Pre-Award Phase

- **Proposal risk vs. Performance Risk**
 - **Proposal risk:** Focuses on the risks and weaknesses associated with an offeror's proposed approach
 - **Performance risk:** “Past performance” assessment of how well the offeror has accomplished similar contracts
- **RFP terms -- (typical definitions)**
 - **Risk process:** IMP narrative describing generic process
 - **Risk mitigation plans (as part of proposal risk assessment):** discrete actions implemented to handle a single risk item
 - **Risk management plan:** program level plan (separate doc.)
 - **Risk approach:** generic, confusing term best avoided in RFP

Solution: Agree on standard definitions before writing the RFP

Problems with Evaluating Processes

- Offerors often can't exceed requirement, so may not be discriminator
- Uses valuable proposal page count in MC Volume for non-discriminating information
- Classic processes (systems engineering, risk management, integration, sustainment, etc.) are usually too broad to describe in a few (20-30) pages, so what does offeror focus on?
 - INCOSE Handbook = several hundred pages
 - Systems Engineering MIL-STD = over 50 pages
- Proposal answer is typically the “textbook answer” if the real “issues” are not defined in Section L (i.e. if requirements analysis is key discriminator, don't ask for discussion of overall “systems engineering” process but focus on requirements process)

Solution: Ask for summary of key processes in IMP narratives and/or focus MC proposal on potential risks within process

Unfocused criteria

- Too many criteria
- Vague criteria
- Criteria that offerors are not able to exceed
- Criteria that are not discriminators
- Areas that are a concern for execution phase but not source selection
- Criteria with no traceability to risk list
- All the technical performance parameters under one sub-factor (dilutes the importance of individual parameters)
- Threshold and/or objectives that aren't measurable

Solution: Use our process to develop MC sub-factors and criteria

Summary

- Too many evaluation criteria are as bad as too few
- Unfocused criteria slow the evaluation process
- Good evaluation criteria are the basis of a good RFP
- Think through the Evaluation Process before the RFP is finished!
- Organize your SSET, don't just publish a list of members
- Don't start writing the RFP until you receive:
 - MC/PR Sub-Factors Development Workshop
 - PRAG Workshop
 - IMP/IMS Workshop

Workshop Exercise

Section L & M Workshop

Provide 2 examples to evaluate (Car Exercise)

- First example will be a group evaluation as a teaching aid
 - Discuss the requirement statement
 - Discuss the risk associated with the requirement
 - Look at a “poor” criterion and then a “better” criterion and discuss the difference (Section M)
 - Discuss the Section L language for the Section M criterion
- Second example will be a short exercise to apply what you’ve learned
 - Similar to the first example, but you will work independently and then we will discuss requirements, risk, criteria, instructions to offerors
- You will receive a handout covering both examples

Communications Requirement:

- Each vehicle must be capable of accurate reproduction of local radio signals. Compact disk or cassette playback capability is desired.
- A two-way communication system between the vehicle and the command post must be provided.

Risk Statement

If the offeror is not able to provide required two-way communications capability, then the senior officers traveling in the vehicles would be unable to communicate with the command post.

Section M Evaluation Criteria

The requirements are met when:

- The offeror provides a description of the proposed vehicle communications system that meets all requirements. (Poor)

or

- The offeror provides a description of the proposed vehicle communications system that meets or exceeds all requirements with emphasis on the two-way communications capability. (Better)
- Could be EVEN better with improved requirement statement!

Section L Instructions to Offerors

- The offeror shall provide a description of the proposed vehicle communications system. (Poor)

or

- The offeror shall provide a detailed description of the proposed vehicle communications system with emphasis on the two-way communications capability. (Better)
- Could be EVEN better with improved requirement statement!

Example 1 Proposal Text

BMA Communications Capability

The staff cars will contain an AM/FM stereo cassette audio system with six speakers, producing 20W of power per channel. A portable two-way UHF/VHF communication system and a built-in cellular phone system will be included in each vehicle. This communication system is that provided by BMA with vehicles acquired for use by foreign dignitaries and includes a 5-year unlimited warranty from the Original Equipment Manufacturer (OEM).

VV Inc. Communications Capability

The 200W BASE AM/FM audio system with six speakers, in-dash CD player/cassette player are integrated with a state of the art telecommunications system. The Eternity fleet will be equipped with the most sophisticated cellular telephone on the market. The CTR-2001 is a cellular telephone and two-way, secure radio in one. Cellular mode offers interference-free communication via standard satellite links. The secure voice UHF/VHF radio mode offers jam-resistant communication capability up to 180 miles on two discreet channels. This subsystem will be treated as an accessory list item with computer-controlled Built-In-Test programs performed at each start up to assess the functionality of every subsystem listed in the accessory list. We will replace, with new components, any subsystem part when brought in as a result of a BIT failure or otherwise proven faulty.

Exercise Example

Availability Requirement:

The Government requires a fleet of new vehicles capable of providing reliable transportation for general officers and senior executive service personnel in and around Los Angeles AFB CA using Government drivers. The Government requires that the contractor shall be solely responsible for the maintenance of vehicles for the period of performance of the contract. This will include all scheduled and unscheduled maintenance, necessary repairs, as well as interior and exterior cleaning and preservation. Upon presentation to the user, 12 vehicles must be available for use 100% of the time, 24 hours a day, 7 days a week, for the period of performance of this contract. The only exception to this 100% availability is that, no more than 4 hours of routine maintenance are allowed to be performed on each vehicle per month.

Risk Statement

If the offeror is not be able to provide required availability and maintenance, then the Government would not have sufficient cars available when needed.

Section M Evaluation Criteria

The requirements are met when:

- The offeror provides a plan to meet required availability and maintenance. (Poor)

or

- The offeror provides a plan that clearly defines an acceptable approach to meeting the availability and maintenance requirements, with rationale, to include number of vehicles provided, maintenance concept (both routine and unscheduled) with qualifications of personnel, interior and exterior cleaning schedule, and provisions for emergency assistance. (Better)

Section L Instructions to Offerors

- The offeror shall provide a plan to meet required availability and maintenance. (Poor)

or

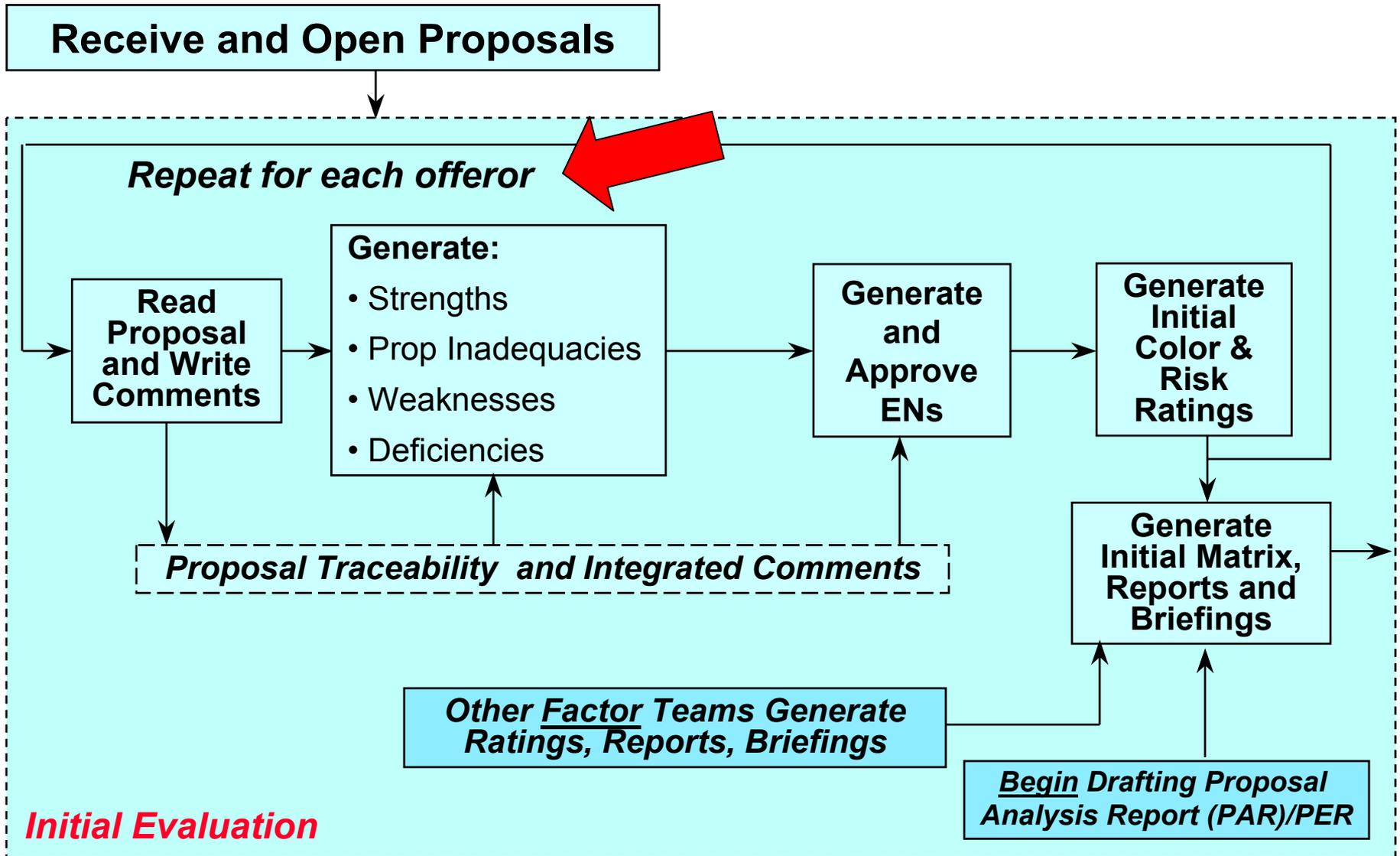
- The offeror shall provide an availability and maintenance plan that details their approach, with appropriate rationale, to satisfy all Government requirements. (Better)

Workshop Summary

- **Good criteria are not magic – they come directly from a full understanding of the requirements and risks and a focused process**
- **Good criteria start with good requirements**
- **Good criteria provide for true discrimination among offerors**
 - **Based on highest risk areas**
 - **Define priorities among requirements and how requirements can be exceeded when appropriate**
 - **Tell the offerors explicitly how they will be evaluated**
- **Poor criteria make everyone's job harder**
- **Good “Instructions to Offerors” are derived directly from the criteria and explicitly tell the offerors what their proposal must contain and in what formats**
- **Poor “Instructions to Offerors” create poor proposals that are difficult to evaluate and make source selection harder**

Back-up Slides

Initial Evaluation Phase



Award Without Discussions

Determine if Award Without Discussions (AWOD) Possible

Solicitation must state AWOD is an option

See FAR 52.215-1(f)(4)

Based on Initial Ratings:

Are x contracts/proposals acceptable as written (no changes)?

Yes

No

Are "Clarifications" needed?

- Relevance of past performance
- Response to adverse past performance
- Resolve minor or clerical errors

No

Go to Comp. Range

Go to Decision Phase

Yes

Send "Clarification" ENs*, review responses and update ratings

No

Yes

Are x contracts/proposals acceptable as written (no changes)?

Award Without Discussions (AWOD)

* = SSA approves release of ENs

x = total # of contracts that must be awarded

Competitive Range Determination

Solicitation must notify offerors the Comp Range can be limited

FAR 15.306 (c)(2)

Does the field need to be reduced to “the most highly rated proposals”?

No

FAR 15.306 (c)(2)

Yes

Are Communication ENs needed?

- *(Not an opportunity to revise proposal)*
- **Resolve inclusion in Competitive Range**
- **Relevance of past performance**
- **Response to adverse past performance**
- **Proposal ambiguities or other concerns**

No

Competitive Range Determination Briefing

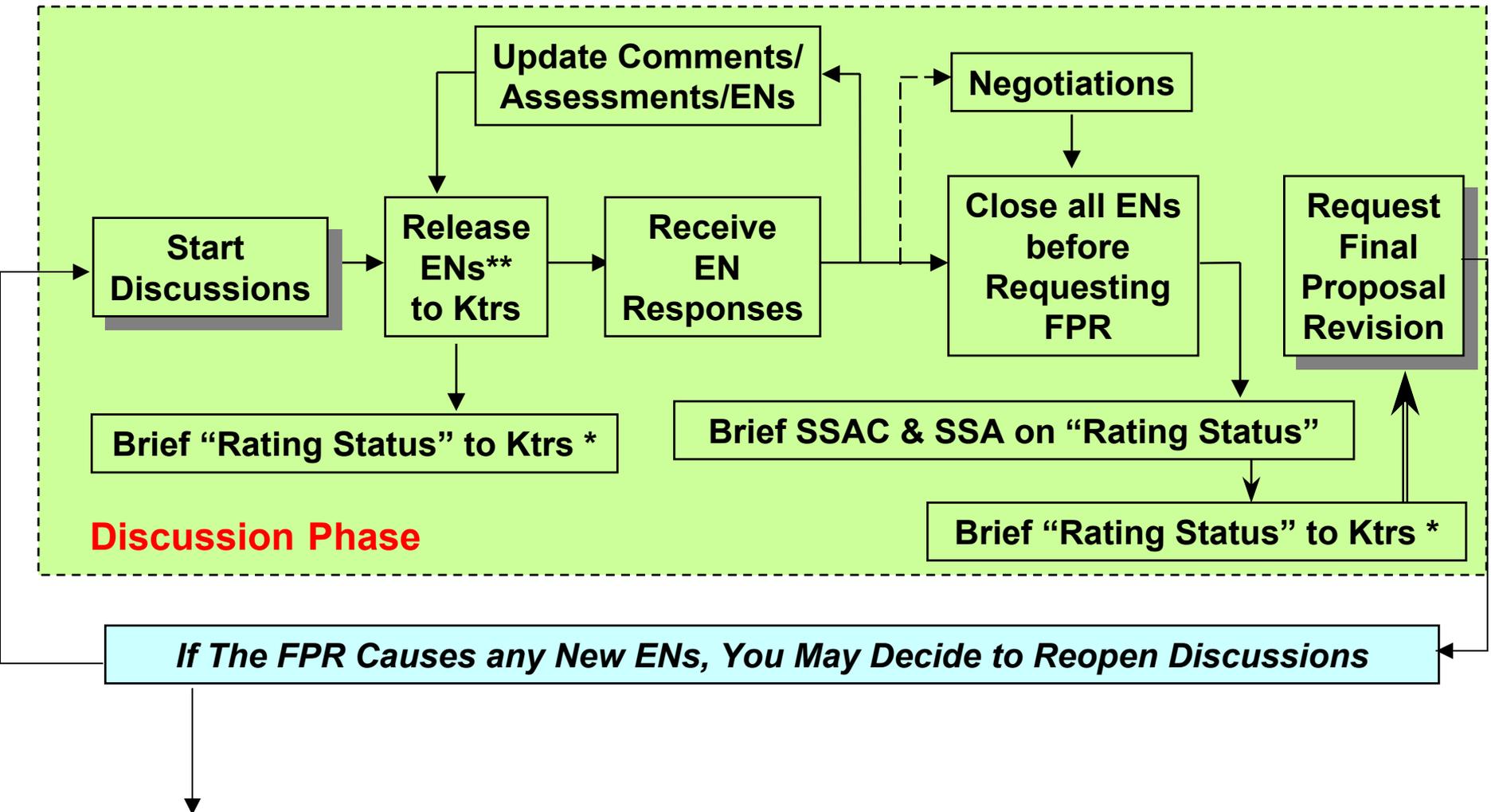
Yes

Send “Communication” ENs*, receive answers and update ratings

Competitive Range

* = SSA approves release of ENs

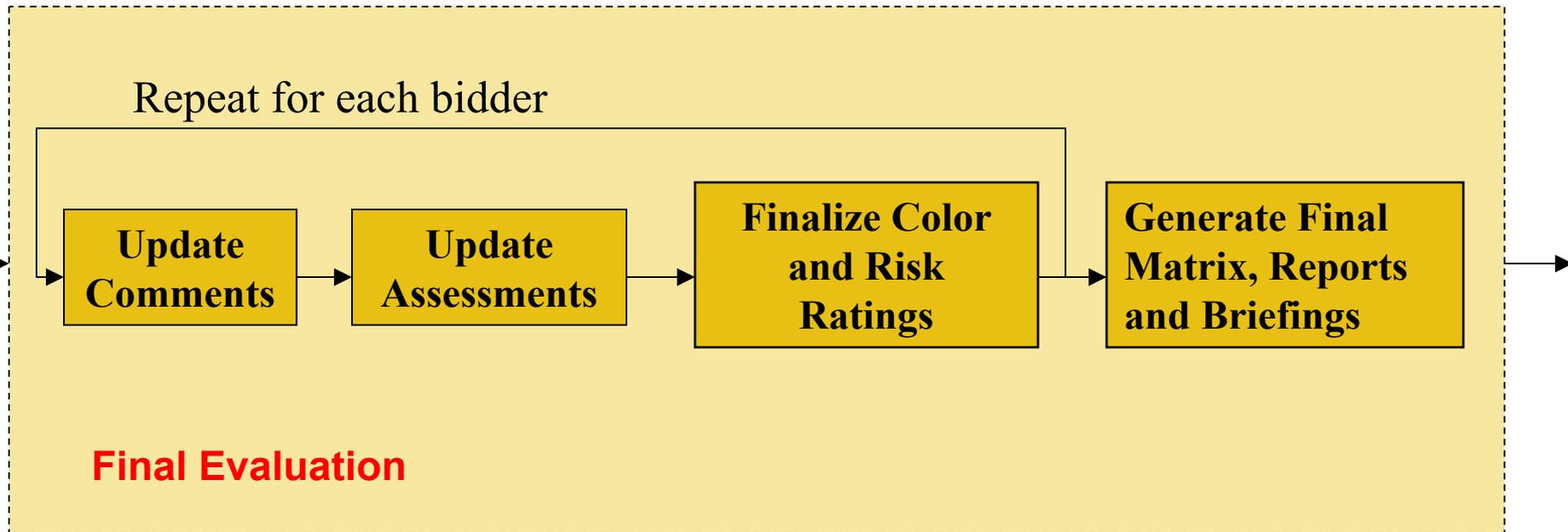
Discussion Phase



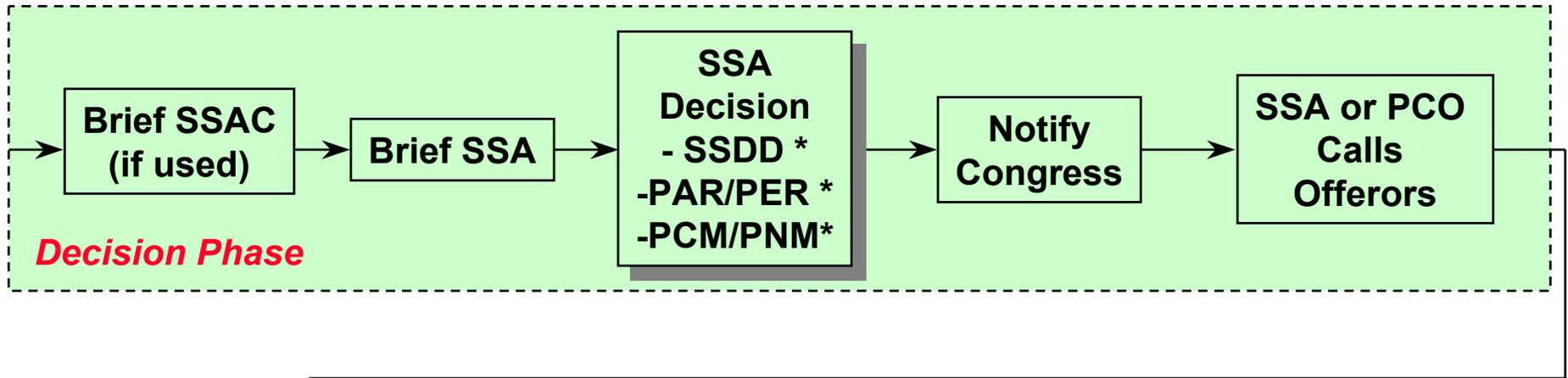
** Best Practice = Brief after CRD and before FPR*

*** = SSA approves release of ENs*

Final Evaluation



Decision Phase



* SSDD = Source Selection Decision Document,
PAR = Proposal Analysis Report, PER = Proposal Evaluation Report
PCM=Price Cost Memo, PNM=Price Negotiation Memo