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| Mandatory Procedure |

**MP5315.3  
Source Selection**

[*Revised February 14, 2011*]

(INTERIM CHANGES: See Policy Memos [11-C-04](https://cs.eis.af.mil/airforcecontracting/knowledge_center/Documents/Contracting_Memos/Policy/11-C-04.pdf) and [11-C-07](https://cs.eis.af.mil/airforcecontracting/knowledge_center/Documents/Contracting_Memos/Policy/11-C-07.pdf))

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### PREFACE

Following are mandatory procedures (MP) for Air Force source selections (all competitive negotiated acquisitions not meeting the exemptions defined in paragraph 2 below). Compliance with [FAR 15](http://farsite.hill.af.mil/reghtml/regs/far2afmcfars/fardfars/far/15.htm), [DFARS 215](http://farsite.hill.af.mil/reghtml/regs/far2afmcfars/fardfars/dfars/dfars215.htm), and [AFFARS 5315](http://farsite.hill.af.mil/reghtml/regs/far2afmcfars/af_afmc/affars/5315.htm) and related law, regulation, and policy is required. These procedures describe how Air Force acquisition activities are to accomplish certain elements of those requirements.

In addition to the mandatory procedures, you will find informational guidance (IG) orlinks to discussions, proven practices, lessons learned, and references to training material related to the required procedures. This information is for reference only. It is NOT mandatory.

You will also find definitions (in [paragraph 8](#p8)) for several terms used throughout this MP. Each term is hyperlinked to its corresponding definition in paragraph 8.

Comments and recommendations concerning this MP may be submitted to [SAF/AQCP](mailto:susan.tackis@pentagon.af.mil), 1060 Air Force Pentagon, Washington DC 20330-1060.

1. **Policy.** The following procedure is required for acquisitions as specified in paragraph 2 below. Deviations from this procedure may be processed and approved in accordance with procedures defined in [AFFARS 5301.4](http://farsite.hill.af.mil/reghtml/regs/far2afmcfars/af_afmc/affars/5301.htm).

2. **Applicability**

2.1 **Exemptions.** This procedure is required for all competitive negotiated acquisitions conducted by Air Force contracting activities except: [IG 2.1](#ig21)

2.1.1. Basic research and acquisitions where Broad Agency Announcements (BAA) are used in accordance with [FAR 35](http://farsite.hill.af.mil/reghtml/regs/far2afmcfars/fardfars/far/35.htm) to solicit proposals and award contracts;

2.1.2. Small Business Innovation Research (SBIR) and Small Business Technology Transfer (STTR) acquisitions solicited and awarded in accordance with [15 USC Sec. 638](http://www4.law.cornell.edu/uscode/15/638.html); [IG 2.1.2](#ig212)

2.1.3. Architect-engineer services solicited and awarded in accordance with [FAR 36](http://farsite.hill.af.mil/reghtml/regs/far2afmcfars/fardfars/far/36.htm);

2.1.4. Acquisitions using the Lowest Price Technically Acceptable (LPTA) process (see [FAR 15.101-2](http://farsite.hill.af.mil/reghtml/regs/far2afmcfars/fardfars/far/15.htm)),

2.1.5. Acquisitions using [IG5315.101-1, Performance Price Tradeoff (PPT)](http://farsite.hill.af.mil/reghtml/regs/far2afmcfars/af_afmc/affars/IG5315.101-1.docx) process except as required by AFFARS 5315.101-1(a). [IG 2.1.5](#ig215)

2.1.6. Acquisitions less than $1 million; and

2.1.7. Acquisitions using simplified acquisition procedures.

3. **Source Selection Objective.** The objective of source selection is to select the proposal that represents the best value to the government.

4. **Pre-solicitation Activities** [IG 4](#ig4)

4.1. **Source Selection Team**

[*Source Selection Authority*](#definitions) *Designations [*[*AFFARS 5315.303(a)*](http://farsite.hill.af.mil/reghtml/regs/far2afmcfars/af_afmc/affars/5315.htm)*]*

|  |  |  |
| --- | --- | --- |
| ***SSA Designations*** | ***$10M and below*** | ***Greater than $10M\**** |
| *ACAT I* | *CO* | *ASAF(A)* |
| *ACAT II and III* | *CO* | *PEO \*\** |
| *AFPEO/CM Acquisitions* | *N/A* | *PEO \*\*\** |
| *Other Contracting* | *CO* | *\*\*\*\** |
| *\* Delegable to no lower than the CO.*  *\*\* PEOs often designate Source Selection Authority.*  *\*\*\* Generally, AFPEO/CM is the Source Selection Authority for services acquisitions >$100M or A-76 acquisitions involving 300 or more positions. For services acquisitions not in a PEO portfolio, see other contracting.*  *\*\*\*\* Except for AFMC, the SSA is the Wing Commander or MAJCOM/DRU two-letter director  responsible for the requirement. Delegation of SSA is authorized.* | | |

4.1.1. **The Source Selection Authority shall** –

4.1.1.1. Be responsible for the proper and efficient conduct of the source selection process in accordance with this procedure.

4.1.1.2. Appoint the respective chairpersons for the [Source Selection Evaluation Team](#definitions) and the [Source Selection Advisory Council](#definitions) when used.

4.1.1.2.1. For ACAT I competitive acquisitions prior to Milestone B (pre-MDAP on Major Defense Acquisition Program lists), appointment of the chairperson for the Source Selection Evaluation Team and the Contracting Officer(s) requires approval of the Senior Procurement Executive (SPE). In the absence of the SPE, the Deputy Assistant Secretary (Contracting) (DAS(C)) may approve these appointment(s).

4.1.1.2.2. For ACAT I competitive acquisitions, as referred to in paragraph 4.1.1.2.1, the Center Commander will submit nominations for SPE approval. The nomination package(s) will be submitted to SAF/AQCK, [safaqck.workflow@pentagon.af.mil](mailto:safaqck.workflow@pentagon.af.mil), when acquisition officials/team members are assigned and allow 10 working days for SPE approval. SAF/AQCK will coordinate nomination and approval packages with the DAS(C) and SPE. Nomination packages will include background information on the candidates for each position. Such information will describe each candidate’s relevant experience and positions held and will provide a rationale for concluding that the selected candidate is the best qualified to perform the duties of SSET chairperson or Contracting Officer, as applicable. The DAS(C) will review each nomination package prior to SPE consideration. The DAS(C) and/or SPE, at their discretion, may interview proposed candidates. Also, the DAS(C) or the SPE may request additional nominees be submitted for consideration.

4.1.1.3. Establish a source selection team as needed and ensure that the team membership remains consistent for the duration of the selection process. [IG 4.1.1.3](#ig4113)

4.1.1.4. Ensure all involved in the source selection are knowledgeable of policy and procedures for properly and efficiently conducting the source selection.

4.1.1.5 For ACAT or major service (Category I and IA) acquisitions, ensure no senior leader is assigned to or performs multiple leadership roles in the source selection in accordance with DFARS 203.170(a). [IG 4.1.1.5](#ig4115)

4.1.1.6. Ensure that the source selection pacing is event driven and not schedule driven. It is critical that realistic source selection schedules are established and source selection events are conducted in a manner that are efficient and effective in meeting overall program schedules and support proper and full compliance with source selection processes.

4.1.2. **The Source Selection Advisory Council Chairperson.** When the [Source Selection Authority](#definitions) establishes a [Source Selection Advisory Council](#definitions), the appointed chairperson shall, subject to source selection authority approval, appoint source selection advisory council members and request additional assistance from other governmental sources such as Secretariat, HQ USAF, or from joint service members. The chairperson shall ensure all Source Selection Advisory Council members are knowledgeable of their responsibilities. [IG 4.1.2](#ig412)

4.1.3. **The Source Selection Evaluation Team Chairperson.**  When the Source Selection Authority establishes a [Source Selection Evaluation Team](#definitions), the appointed chairperson shall --

4.1.3.1. Appoint members to the Source Selection Evaluation Team, including a Performance Confidence Assessment Group and its chairperson as required, subject to approval of the Source Selection Authority.

4.1.3.2. Establish a Performance Confidence Assessment Group for all source selections in excess of $100 million. [IG 4.1.3.2](#ig4132)

4.1.3.3. Ensure personnel, resources, and time assigned to the source selection reflect the complexity of the program. After source selection plan approval, any personnel changes to the Source Selection Evaluation Team may be approved by the Source Selection Evaluation Team chairperson in an addendum to the [Source Selection Plan](#definitions). [IG 4.1.3.3](#ig4133)

4.1.3.4. Ensure members of the Source Selection Evaluation Team are knowledgeable of their responsibilities before any proposal is reviewed, including details on how the evaluation is to be conducted.

4.1.4. The **Contracting Officer shall** --

4.1.4.1. Ensure that, in accordance with [AFFARS 5315.305(c)](http://farsite.hill.af.mil/reghtml/regs/far2afmcfars/af_afmc/affars/5315.htm), required approvals are obtained and contract clause requirements are met before non-government personnel are allowed to provide source selection support; and

4.1.4.2. Manage all business aspects of the acquisition, and [IG 4.1.4.2](#ig4142)

4.1.4.3. Assist and advise the Source Selection Authority on the proper execution of each source selection event in accordance with this procedure.

4.1.5. **Advisors**. The Source Selection Authority may establish advisors as necessary to assist in the source selection evaluation. Although advisors may assist in and provide input regarding the evaluation, they may not determine ratings or rankings of offerors' proposals.

4.1.6. **Primary Responsibility.** Government personnel assigned as a source selection team member shall consider this duty as their primary responsibility. Their source selection assignment shall take precedence over other work assignments. Supervisors are responsible for ensuring that other work assignments do not adversely impact the source selection process. Key members of the source selection team, such as the Source Selection Evaluation Team Chairperson, the Performance Confidence Assessment Group Chairperson and the contracting officer, shall have source selection experience, if possible, and be designated early in the acquisition process. [IG 4.1.6](#ig416)

4.2. **Protection of Source Selection Documentation**

4.2.1. **The Source Selection Authority shall** --

4.2.1.1. Ensure all involved in the source selection are briefed and knowledgeable of Subsection 27(a) of the Office of Federal Procurement Policy Act ([41 USC Sec. 423](http://www4.law.cornell.edu/uscode/41/423.html) and [FAR 3.104](http://farsite.hill.af.mil/reghtml/regs/far2afmcfars/fardfars/far/03.htm)) regarding unauthorized disclosure of source selection information.

4.2.1.2. Ensure that all persons receiving source selection information are instructed to comply with applicable standards of conduct (including procedures to prevent the improper disclosure of source selection information), and sign the Non-Disclosure Agreement ([Attachment 1](#atch1)). [IG 4.2.1.2](#ig4212)

4.2.2. **The Contracting Officer shall** --

4.2.2.1. Ensure that procedures exist to safeguard source selection information in accordance with [FAR 3.104](http://farsite.hill.af.mil/reghtml/regs/far2afmcfars/fardfars/far/03.htm) as supplemented. [IG 4.2.2.1](#ig4221)

4.2.2.2. Approve access to or release of source selection information before and after contract award, in accordance with [FAR 3.104-4](http://farsite.hill.af.mil/reghtml/regs/far2afmcfars/fardfars/far/03.htm).

4.2.2.3. Maintain source selection evaluation records. When evaluation information developed by any member of the source selection team is presented in any form to the SSA, that evaluative material and any related supporting evaluative material becomes an official record that must be maintained and must not be altered. Updates, revisions, or changes to that evaluation information must be captured in subsequent documentation in a way that the original record remains distinct. Evaluative materials are considered working papers prior to their disclosure to the SSA. These working papers may be changed or modified by their author as necessary in order to support the evaluation process.

4.3. **Pre-Solicitation Planning**

4.3.1. **Risk Assessment**. The source selection team, in consultation with other stakeholders, shall determine the extent of risk analysis necessary to support the acquisition. [IG 4.3.1](#ig431)

4.3.2 Exchanges with Industry or Potential Offerors on Most-Probable-Cost Analysis (for ACAT programs entering System Development and Demonstration (SDD) utilizing a Cost Reimbursement or Fixed-Price-Incentive contract). Ensure during the solicitation development, detailed exchanges or deliberations occur between the government and potential offerors regarding program cost estimates and the methods of estimating such costs. [IG 4.3.2R1](#ig432r1) [IG 4.3.2R2](#ig432r2)

4.3.2.1 Develop an estimate for the cost of all contract line items and associated options that will be included in the contract. This estimate shall be referred to as the Program Office Estimate (POE). Define all the components that make up the aggregate government most probable cost and specify them in the Section M evaluation criteria.

4.3.3. **Source Selection Plan.** Acquisitions covered under this Mandatory Procedure shall have a [Source Selection Plan](#definitions). The Source Selection Plan shall include the information outlined below. Whenever the contracting officer is the [Source Selection Authority](#definitions), a streamlined Source Selection Plan may be documented in the [Simplified Source Selection Report](#definitions) (see [7.11](#p711) below). Whenever possible, refer to and attach supporting documents rather than repeating information in the Source Selection Plan. See [IG5315.303](http://farsite.hill.af.mil/reghtml/regs/far2afmcfars/af_afmc/affars/IG5315.303.docx), Source Selection Plan (SSP) Guide, for assistance in preparing a Source Selection Plan.

4.3.3.1. A brief description of the requirement, including reference to any applicable guidance such as a Program Management Directive (PMD).

4.3.3.2. A summary of the acquisition strategy, including, when applicable, type(s) of contract(s) anticipated, the incentives contemplated, milestone demonstrations intended, special contract clauses, performance metrics and language supporting it as a performance based services acquisition.

4.3.3.3. Source selection team. Describe the proposed organizational structure. List recommended members and advisors by name, position title, company affiliation, if applicable, or by functional area. Identify other government organizations that will participate in the source selection.

4.3.3.4. Presolicitation activities. Describe the activities leading up to the release of the solicitation such as market research, draft solicitations, and synopsis. For the market research, discuss how it was used to achieve competition, including a discussion of screening criteria, if applicable. [IG 4.3.3.4](#ig4334)

4.3.3.5 Communications. Describe the process and controls for communication between industry and government personnel, and internal government communication to include the use of e-mail, during the source selection. Include a discussion of the types of communications that are authorized by the SSA for the source selection. If the use of e-mail is authorized, it shall be encrypted to ensure only the intended recipient can open/view the contents and the subject line shall include the words “Source Selection Information – See [FAR 2.101](http://farsite.hill.af.mil/reghtml/regs/far2afmcfars/fardfars/far/02.htm) and [3.104](http://farsite.hill.af.mil/reghtml/regs/far2afmcfars/fardfars/far/03.htm).”[IG 4.3.3.5](#ig4335)

4.3.3.6. Evaluation factors and subfactors. Describe the evaluation factors and subfactors and their relative order of importance by attaching the evaluation criteria (Section M or equivalent provisions of the solicitation). Describe the evaluation process, including specific procedures and techniques to be used in evaluating proposals. If the [Source Selection Authority](#definitions) desires to review the relevant portions of the instructions to offerors (Section L or equivalent provision of the solicitation), attach those as well. See [IG5315.204-5(b)](http://farsite.hill.af.mil/reghtml/regs/far2afmcfars/af_afmc/affars/IG5315.204-5(b).docx) Source Selection Documentation – Section L Guide and [IG5315.204-5(c)](http://farsite.hill.af.mil/reghtml/regs/far2afmcfars/af_afmc/affars/IG5315.204-5(c).docx) Source Selection Documentation – Section M Guide for assistance in preparing Sections L and M for source selections.

4.3.3.7. Schedule of events. Identify the schedule for significant source selection activities in sufficient detail to allow the reviewing authorities to assess the practicality of the schedule.

4.3.3.8. Non-government personnel. Address the use of non-government personnel. Non-government personnel shall not serve as the SSA, be the SSET or SSAC chairpersons or members of or advisors to the PCAG and shall not have any financial interests with any of the offerors. Reference [FAR 9.505-4(b)](http://farsite.hill.af.mil/reghtml/regs/far2afmcfars/fardfars/far/09.htm), [FAR 37.203(d)](http://farsite.hill.af.mil/reghtml/regs/far2afmcfars/fardfars/far/37.htm) and [AFFARS 5315.305(c)](http://farsite.hill.af.mil/reghtml/regs/far2afmcfars/af_afmc/affars/5315.htm) for use of non-government personnel. [IG 4.3.3.8](#ig4338)

4.3.3.9. Identify and explain requested or approved deviations and delegations.

4.3.4. **The Source Selection Authority shall** approve the Source Selection Plan before solicitation release and approve subsequent revisions to the plan. For changes to the source selection team membership, see [paragraph 4.1.3.3](#p4133).

4.3.5. **The Source Selection Team shall** --

4.3.5.1. Prepare and maintain the [Source Selection Plan](#definitions).

4.3.5.2. Coordinate the plan within the source selection organization prior to forwarding the plan to the [Source Selection Authority](#definitions) for approval.

4.3.5.3. Submit the plan sufficiently in advance of the planned acquisition action to permit review and approval by the source selection authority and early establishment of the source selection organization. Whenever possible, in order to accelerate the acquisition, the Source Selection Plan shall be prepared and approved in conjunction with the Life Cycle Management Plan (LCMP), Single Acquisition Management Plan (SAMP), Integrated Program Summary (IPS), or Acquisition Plan (AP) (see [AFFARS Library - Part 5307](https://cs.eis.af.mil/airforcecontracting/knowledge_center/Pages/5307.aspx)). Briefing charts may be used to document the Source Selection Plan.

4.3.5.4. Submit proposed revisions to an approved Source Selection Plan to the Source Selection Authority. (Refer to paragraph 4.1.3.3 for revising plans as a result of personnel changes.)

4.3.6. **The Source Selection Advisory Council** **Chairperson** **shall** review the Source Selection Plan and any revisions prior to Source Selection Authority approval**.** [IG 4.3.6](#ig436)

4.3.7. **The Source Selection Evaluation Team Chairperson shall** be responsible for establishing effective liaison with the [requiring office](#definitions) to ensure requirements are effectively addressed within the [requirements documents](#definitions) and, if used, within threshold/objective language.

4.3.8. **The** [**Performance Confidence Assessment Group**](#definitions) **shall** develop the recency and relevancy definitions and recommend the past performance information to be required from offerors in accordance with [FAR 15.305(a)(2)](http://farsite.hill.af.mil/reghtml/regs/far2afmcfars/fardfars/far/15.htm) and this procedure. [IG 4.3.8](#ig438)

4.3.9. **The Contracting Officer shall --**

4.3.9.1. Ensure that the Source Selection Plan or the Simplified Source Selection Report, when used, is executable, reflects the approved acquisition strategy, and contains the appropriate linkages between requirements documents, program risks, evaluation criteria, and proposal evaluation methodology that will facilitate a sound source selection decision.

4.3.9.2 Ensure that any requests for source selection delegations are properly accomplished and documented in the Source Selection file.

**MP5315.304 -- Evaluation Factors and Significant Subfactors**

4.4. **Evaluation Criteria and Basis for Award.** [IG 4.4R1](#ig44r1)Evaluation factors and subfactors represent those specific characteristics that are tied to significant requirements [IG 4.4R2](#ig44r2) having an impact on the source selection decision and that are expected to be discriminators. [IG 4.4R3](#ig44r3) They are the uniform baseline against which each offeror’s proposal is evaluated allowing the government to make a best value determination. The evaluation factors and subfactors and their relative importance shall be set forth in the evaluation criteria (Section M or equivalent provision) of the solicitation in enough depth to communicate how the proposal will be evaluated and the rating determined. Numerical or percentage weighting of the relative importance of evaluation factors and subfactors shall not be used. Evaluation factors and subfactors may be quantitative, qualitative, or a combination of both. The evaluation factors and subfactors shall be the primary determinant of the detailed information requested in the solicitation’s instructions to offerors (Section L or equivalent provision). [IG 4.4R4](#ig44r4)

4.4.1. **Evaluation Factors**. Air Force source selections shall utilize the following evaluation factors:

4.4.1.1. **Mission Capability.** The [mission capability](#definitions) evaluation provides for two distinct but related assessments: the Mission Capability Technical Rating and the Mission Capability Risk Rating (see 5.5.1.1 and 5.5.1.2). [IG 4.4.1.1r1](#ig4411r1) The Mission Capability Technical Rating provides an assessment of the offeror’s capability to satisfy the government’s requirements. [IG 4.4.1.1r2](#ig4411r2)When subfactors are used, establish the minimum number necessary for the evaluation of proposals, normally limited to six subfactors. Additional subfactors may be justified and documented in the [Source Selection Plan](#definitions). Systems Engineering shall be a mission capability subfactor in all ACAT program acquisitions, and in all other acquisitions where systems engineering effort is required. If the ACAT acquisition has no Systems Engineering effort, the SSA, with PEO approval, shall document the contract file accordingly and a systems engineering subfactor is not required. The Mission Capability Risk Rating assesses the degree to which the offeror’s proposed approach for the requirements of the solicitation may cause disruption of schedule, increased costs, or degraded performance.

4.4.1.2. **Past Performance.** The past performance evaluation factor assesses the degree of confidence the government has in an offeror’s ability to supply products and services that meet users’ needs, including cost and schedule, based on a demonstrated record of performance. A past performance evaluation is required in accordance with Director of Defense Procurement Class Deviation 99-O0002 dated January 29, 1999, which states the requirement thresholds are: (1) $5 million for systems and operations support, (2) $1 million for services, information technology, and (3) $100,000 for fuels or health care. A past performance evaluation may be accomplished for acquisitions below these thresholds at the discretion of the [Source Selection Authority](#definitions). For acquisitions that require a past performance evaluation, but are below the threshold for establishing a [Performance Confidence Assessment Group](#definitions), the Source Selection Plan shall indicate individual(s) responsible for the Past Performance review. [IG 4.4.1.2](#ig4412)

4.4.1.3.  **Cost or Price.** The evaluation of the cost or price to the government for the supplies or services being acquired.

4.4.1.3.1 **Most Probable Cost (MPC).** The MPC estimate is the government estimate of the costs to acquire specified goods and/or services. This estimate includes not only those costs that will be included as part of the contract, but may include any other costs that will be incurred by the government in the performance of the acquisition program.  The MPC is based upon an analysis of each offeror’s unique proposal in accordance with [FAR 15.404-1](http://farsite.hill.af.mil/reghtml/regs/far2afmcfars/fardfars/far/15.htm), and may consider such information as contained in the Program Office Estimate (POE) or Independent Government Estimate. Define all the components that make up the aggregate government most probable cost and specify them in the Section M evaluation criteria.[IG 4.4.1.3.1](#ig44141) and [IG5.5.4](#ig554)

4.4.1.3.2. (**Most Probable Life Cycle Cost (MPLCC).**  For ACAT programs, the Deputy Assistant Secretary (Contracting)(DAS(C)) will approve the use of MPLCC as an evaluation criterion. The program manager with the assistance of the Contracting Officer will prepare the request for approval by including a justification statement addressing the rationale and methodology for using MPLCC as an evaluation criterion. Such request will be submitted to SAF/AQCK, [safaqck.workflow@pentagon.af.mil](mailto:safaqck.workflow@pentagon.af.mil) 10 working days prior to convening the acquisition strategy panel (ASP) or the staffing of the acquisition plan, whichever occurs first.

4.4.1.4 **Cost/Price Risk (Optional).** This evaluation factor may be used, with SSA approval, for programs that use a Cost Reimbursement or Fixed-Price Incentive type contract structure involving a most probable cost/price evaluation. The Cost/Price Risk rating assesses the degree to which an offeror’s cost proposal compares with the government’s best estimate of the offeror’s Most Probable Cost (MPC). [IG 4.4.1.4R1](#ig4414r1) If utilized, Cost/Price Risk shall be a significant evaluation factor. [IG 4.4.1.4R2](#ig4414r2)

4.4.2. **Relative Importance of Factors and Trade-offs.** The solicitation shall state, at a minimum, whether all evaluation factors other than cost or price, when combined, are (1) significantly less important than cost or price; (2) approximately equal to cost or price; or (3) significantly more important than cost or price, however cost/price will contribute substantially to the selection decision. [IG 4.4.2r1](#ig442r1) If specific trade-offs are to be considered, then how the trade-offs will be evaluated must be stated in the Request for Proposal. [IG 4.4.2r2](#ig442)

4.4.3. **Other Solicitation Requirements.**  The statement and accompanying instructions required by [AFFARS 5315.305(a)](http://farsite.hill.af.mil/reghtml/regs/far2afmcfars/af_afmc/affars/5315.htm) shall inform offerors how the government will consider those solicitation requirements not covered by the items in [4.4.1](#p441) above. While offerors may propose exceptions to the solicitation requirements, the government is not obligated to accept such offers. Any change to the requirement as a result of accepting an exception shall be reflected within the resultant contract. [IG 4.4.3](#ig443)

4.4.4. **MAJCOMs and DRUs** may establish alternative factors or subfactors for specific classes of “other contracting” acquisitions when required to conduct an effective and efficient evaluation of offers. However, all other requirements of this procedure must be followed. [IG 4.4.4](#ig444)

4.5. **Development and Release of Request for Proposal.** [IG 4.5](#ig45) The contracting officer shall –

4.5.1. Release the solicitation only after approval of business clearance and the Source Selection Authority has approved the Source Selection Plan. [IG 4.5.1](#ig451)

4.5.2. After release of a solicitation, serve as the single point of contact for inquiries from actual or prospective offerors.

**MP5315.305 Proposal Evaluation**

5. **Evaluation Activities** [IG 5](#ig5)

5.1. The **Source Selection Advisory Council Chairperson** shall convene [Source Selection Advisory Council](#definitions) meetings at any stage in the evaluation process as requested by the [Source Selection Authority](#definitions).

5.2. The **Source Selection Advisory Council** shall review the evaluation and findings of the [Source Selection Evaluation Team](#definitions) to ensure their accuracy, consistency, and supportability and shall provide advice, analysis, briefings, and consultation as requested by the Source Selection Authority.

5.3. **The Contracting Officer and the Source Selection Evaluation Team Chairperson** shall ensure that proposals are evaluated based solely on the criteria contained in the approved Source Selection Plan and the solicitation (Section M or equivalent solicitation provision) and ensure the evaluation is properly documented in accordance with [paragraph 7](#p7) of this procedure. All evaluation records and narratives shall be reviewed collaboratively by the CO and the SSET Chairperson for completeness and compliance with this procedure.

5.4. **The Source Selection Evaluation Team** shall conduct an in-depth review [IG 5.4R1](#ig54r1) and evaluation of each proposal and any subsequently submitted information or proposal revisions, against the factors and subfactors and other solicitation requirements ([4.4.3](#p443)). [IG 5.4R2](#ig54r2)

5.4.1. **The Performance Confidence Assessment Group** shall conduct the past performance assessment.

5.5. **Evaluation Factors.** Air Force factor ratings and assessments focus on each factor or subfactor as described below.

5.5.1. **Mission Capability Evaluation.** The [Mission Capability](#definitions) Factor or Subfactors when established, shall receive two separate and distinct ratings: a technical rating that reflects the degree to which the Mission Capability Factor or Subfactor exceeds, meets or does not meet the minimum performance or capability requirements; and a risk rating that assesses the degree to which an offeror’s proposed approach to achieving the Mission Capability Factor or Subfactor may involve risk of disruption of schedule, increased cost or degradation of performance, the need for increased government oversight, and the likelihood of unsuccessful contract performance. These two ratings are presented together and are of equal impact for the rating for each Mission Capability Factor or Subfactor. When subfactors are established, the ratings shall be done at the subfactor level and an overall factor-level rating is not assigned. [IG 5.5.1](#ig551)

5.5.1.1 **Mission Capability Technical Rating.** The mission capability technical rating focuses on the strengths, deficiencies, and uncertainties [IG 5.5.1.1r1](#ig5511R1) in the offeror’s proposal. When subfactors are established, the mission capability rating shall be rated at the subfactor level and an overall factor-level rating is not assigned. Mission capability technical ratings shall be rated using the color ratings listed in TABLE 1 below [IG 5.5.1.1r2](#ig551r2).

|  |  |  |
| --- | --- | --- |
| **TABLE 1 - MISSION CAPABILITY TECHNICAL RATINGS** | | |
| **Color** | **Rating** | **Description** |
| Blue | Exceptional | Exceeds specified minimum performance or capability requirements in a way beneficial to the government. A proposal must have one or more [strengths](#definitions) and no deficiencies to receive a blue. |
| Green | Acceptable | Meets specified minimum performance or capability requirements. A proposal must have no deficiencies to receive a green but may have one or more strengths. |
| Yellow | Marginal | There is doubt regarding whether an aspect of the proposal meets a specified minimum performance or capability requirements, but any such [uncertainty](#definitions) is correctable. |
| Red | Unacceptable | Fails to meet specified minimum performance or capability requirements. The proposal has one or more deficiencies and is not awardable. |

Through discussions, the government evaluators should obtain the necessary information from offerors with interim Yellow/Marginal ratings to resolve outstanding issues within the offer. Yellow/Marginal ratings should be rare by the time of the final evaluation.

5.5.1.2.  **Mission Capability Risk Rating.**  The mission capability risk rating focuses on the weaknesses associated with an offeror’s proposed approach. When mission capability subfactors are established, a mission capability risk rating shall be assigned to each mission capability subfactor and an overall factor-level risk rating is not assigned. If mission capability subfactors are not established, mission capability risk rating is assigned at the factor level. Assessment of a mission capability risk considers potential for disruption of schedule, increased cost, or degradation of performance, the need for increased government oversight, and the likelihood of unsuccessful contract performance. Mission capability risk shall be rated using the ratings listed in TABLE 2 below. For any weakness identified, the evaluation shall address the offeror’s proposed mitigation [IG 5.5.1.2r1](#ig5512r1) (if available) and document why that approach is or is not acceptable. Whenever a strength is identified as part of the mission capability technical rating, (see 5.5.1.1 above), the evaluation shall assess whether the offeror’s proposed approach would likely cause an associated weakness which may impact schedule, cost, or performance. [IG 5.5.1.2r2](#ig5512)

|  |  |
| --- | --- |
| **TABLE 2 – MISSION CAPABILITY RISK RATINGS** | |
| **Rating** | **Description** |
| Low\* | Has little potential to cause disruption of schedule, increased cost or degradation of performance. Normal contractor effort and normal government monitoring will likely be able to overcome any difficulties. |
| Moderate\* | Can potentially cause disruption of schedule, increased cost or degradation of performance. Special contractor emphasis and close government monitoring will likely be able to overcome difficulties. |
| High\* | Likely to cause significant disruption of schedule, increased cost or degradation of performance. Extraordinary contractor emphasis and rigorous government monitoring may be able to overcome difficulties. |
| Unacceptable | The existence of a significant weakness or combination of weaknesses that is very likely to cause unmitigated disruption of schedule, drastically increased cost or severely degraded performance. Proposals with an unacceptable rating are not awardable. |

\* A plus “+“ rating may be used as an option when risk is evaluated to be in the upper boundaries of a Mission Capability Risk Rating, but is not high enough to merit the next inferior rating. When assigning the risk rating, teams should endeavor to rate proposals as low, moderate, high, or unacceptable. However, if additional stratification within the Low, Moderate or High Risk ratings is desired, evaluators/teams may (optionally) annotate this by adding a plus “+” to the risk rating. For example, where in the judgment of the evaluator, an offeror has risk that approaches or is nearly rated as a Moderate risk, a Mission Capability Risk Rating of “Low +” could be assigned. Ensure, however, that the source selection record adequately addresses the rationale for assigning this inferior risk rating. The use of a (+) shall not apply to the “Unacceptable” risk rating.

5.5.2. **Past Performance Evaluation**. [IG 5.5.2R1](#ig553r1) The past performance evaluation [IG 5.5.2R2](#ig553r2) results in an assessment of the government’s confidence in the offeror’s ability to fulfill the solicitation requirements while meeting schedule, budget, and performance quality constraints [IG 5.5.2R3](#ig553r3). The past performance evaluation considers each offeror's demonstrated record of performance in supplying products and services that meet users' needs. The [performance confidence](#definitions) rating is normally assessed at an overall factor level after evaluating aspects of the offeror's recent past performance, focusing on performance that is relevant [IG 5.5.2R4](#ig553r4) to the mission capability subfactors and cost or price.

5.5.2.1. **Sources of Past Performance Information for Evaluation.**

5.5.2.1.1. Past performance information may be provided by the offeror.

5.5.2.1.2. Past performance information shall be obtained from the Past Performance Information Retrieval System ([PPIRS](http://www.ppirs.gov/)), and may be obtained from questionnaires tailored to the circumstances of the acquisition, from Defense Contract Management Agency, from interviews with program managers and contracting officers, Fee Determining Officials, or from other sources known to the government. Available information from previous source selections or contractor capability assessments shall be used if the information is recent and relevant. The recency and relevancy of the past performance information is important in determining what contracts/programs/effort are evaluated. Recency and relevancy definitions shall be individually tailored for each acquisition and stated in Section M or equivalent solicitation provision.

5.5.2.1.3 When evaluating past performance in competitive, negotiated acquisitions of less than $5M for commodities, contracting officers shall utilize the government-wide Past Performance Information Retrieval System-Statistical Reporting (PPIRS-SR). Insert solicitation language written substantially as follows in Section M:

(1) Quantifiable contractor quality and delivery performance data contained within the government-wide Past Performance Information Retrieval System-Statistical Reporting (PPIRS-SR) will be utilized in the evaluation of the past performance factor for offers received in response to this solicitation. Suppliers with no history in PPIRS-SR will be displayed to contracting officers without a rating.

(2) PPIRS-SR classifications are established monthly for each supplier and can be reviewed at <http://www.ppirs.gov>. Suppliers are granted access to PPIRS-SR for their own classifications. Offerors are encouraged to review their own classifications as well as the PPIRS-SR reporting procedures and methodology detailed in the PPIRS-SR Procedures Manual and the PPIRS-SR User Guide available at <http://www.ppirs.gov>. The method to challenge a rating is also found on the identified website.

Insert the appropriate language substantially as follows in Section M to identify whether the Standard or Best Value Assessment will be used, and if Best Value Assessment will be used with edited default values for quality, delivery and cost/price (other than weighted 1/3 each):

(1) For purposes of this evaluation, the Standard Assessment will be used; or

(2) For purposes of this evaluation, the Best Value Assessment will be used; or

(3) The following Best Value Assessment weighting will be used resulting in a best offer ranking:

|  |  |
| --- | --- |
| Quality | X% |
| Delivery | X% |
| Cost / Price | X% |
|  | 100% |

5.5.2.2. **Performance Confidence Assessment.** In conducting a [performance confidence assessment](#definitions), each offeror shall be assigned one of the ratings in TABLE 3 below.

|  |  |
| --- | --- |
| **TABLE 3 - PERFORMANCE CONFIDENCE ASSESSMENTS** | |
| **Rating** | **Description** |
| SUBSTANTIAL CONFIDENCE | Based on the offeror’s performance record, the government has a high expectation that the offeror will successfully perform the required effort. |
| SATISFACTORY CONFIDENCE | Based on the offeror’s performance record, the government has an expectation that the offeror will successfully perform the required effort. |
| LIMITED CONFIDENCE | Based on the offeror’s performance record, the government has a low expectation that the offeror will successfully perform the required effort. |
| NO  CONFIDENCE | Based on the offeror’s performance record, the government has no expectation that the offeror will be able to successfully perform the required effort. |
|  |  |
| UNKNOWN CONFIDENCE | No performance record is identifiable or the offeror’s performance record is so sparse that no confidence assessment rating can be reasonably assigned. [IG 5.5.2.2](#ig5532) |

5.5.3. **Cost or Price Evaluation.** [IG 5.5.3R1](#ig554r1)Cost or price shall be an evaluation factor in each source selection. The proposed and, if applicable, evaluated total cost/price (such as most probable cost) must be presented with narrative descriptions of reasonableness, realism, affordability, etc. to the [Source Selection Authority](#definitions). The impact of any weakness identified that may disrupt schedule, increase cost, or degrade performance will be quantified (in dollars), where applicable, and utilized to adjust the cost/price (probable cost) for the Cost/Price evaluation Factor. The [Source Selection Evaluation Team](#definitions) must use the appropriate analysis technique(s) identified in [FAR 15.404](http://farsite.hill.af.mil/reghtml/regs/far2afmcfars/fardfars/far/15.htm) as supplemented to evaluate the proposed cost or price and shall inform offerors of the technique(s) to be used in the evaluation criteria (Section M or equivalent provisions of the solicitation). Note that a cost/price realism analysis cannot result in an adjustment of an offeror’s proposed fixed prices. See [FAR 15.404-1(d)(3)](http://farsite.hill.af.mil/reghtml/regs/far2afmcfars/fardfars/far/15.htm). To ensure the best possible evaluation, the entire government evaluation team shall have access to cost or pricing information. Under appropriate circumstances, non-government advisors (if approved to participate on the source selection IAW [FAR 37.204](http://farsite.hill.af.mil/reghtml/regs/far2afmcfars/fardfars/far/37.htm)) may be permitted access as required. [IG 5.5.3R2](#ig554r2)

5.5.4 **Cost/Price Risk Evaluation.** For programs in which the SSA has approved the use of a cost/price risk factor, the SSET must perform a cost/price risk evaluation. The cost/price risk evaluation assesses the degree to which an offeror’s cost proposal for the contract line items to be included in the intended contract and associated options, if evaluated, compares with the government MPC for the same items. Cost/Price Risk shall be rated using the risk ratings listed in Table 4 below. In order to ensure that the Air Force and industry adequately understand the degree of cost/price risk associated with an offeror’s proposal, the SSET must develop the initial government MPC before competitive range determination and adequately communicate information about the rationale for the government’s risk assessment of Cost/Price Risk factor with each offeror during the discussions period (before request for Final Proposal Revision). [IG 5.5.4](#ig555)

|  |  |
| --- | --- |
| **TABLE 4 – COST/PRICE RISK RATINGS** | |
| **Rating** | **Description** |
| Low | Little difference exists between the offeror’s proposed cost/price and the government’s best estimate of the offeror’s most probable cost. Cost growth and/or other anomalies related to cost/price are unlikely to occur and any potential impact is manageable. |
| Moderate | Some difference exists between the offeror’s proposed cost/price and the government’s best estimate of the offeror’s most probable cost. Cost growth and/or other anomalies related to cost/price may occur and the potential impact may require special attention. |
| High | Significant difference exists between the offeror’s proposed cost/price and the government’s best estimate of the offeror’s most probable cost. Cost growth and/or other anomalies related to cost/price is likely to occur and the impact may be unmanageable. |

**MP5315.306 -- Exchanges with Offerors after Receipt of Proposals**

5.6. **Exchanges**

5.6.1. **The Source Selection Authority** shall **--**

5.6.1.1. Review all necessary information prior to entering discussions to determine if award without discussions is appropriate. [IG 5.6.1.1](#ig5611)

5.6.1.2. Establish the competitive range, approve entering discussions, and approve the release of [evaluation notices](#definitions) (EN). Other types of ENs (Clarification and Communication) can be released prior to defining a competitive range. [IG 5.6.1.2](#ig5612) The [Source Selection Authority](#definitions) may designate the Contracting Officer as the approval authority for release of evaluation notices by so stating in the [Source Selection Plan](#definitions).

5.6.2. **The Source Selection Evaluation Team** shall evaluate all proposals, prepare evaluation notices and, if discussions are to be conducted, recommend through the contracting officer whether any offeror should be eliminated from the competitive range. The [Source Selection Evaluation Team](#definitions) shall prepare the competitive range briefing [IG 5.6.2R1](#ig562r1), if required; the charts may be used to document the evaluation and competitive range determination. [IG 5.6.2R2](#ig562r2)

5.6.2.1. If adverse past performance information [IG 5.6.2.1R1](#ig5621r1), to which the contractor has had no opportunity to respond, is the reason an offeror may not receive an award without discussions or be excluded from the competitive range, the offeror must be provided an opportunity to address the information. This exchange occurs through the issuance of a “Clarification” or “Communications” evaluation notice (EN) [IG 5.6.2.1R2](#ig5621r2). Do not provide names of individuals providing information about a contractor’s past performance.

5.6.3. **The Source Selection Evaluation Team Chairperson** shall --

5.6.3.1. Review Evaluation Notices and recommend Source Selection Authority approve their release through the contracting officer; and

5.6.3.2. Ensure that the team membership remains consistent for all discussions with offerors.

**5.6.4. The contracting officer** shall --

5**.**6.4.1. After receipt of proposals, control exchanges with offerors in accordance with [FAR 15.306](http://farsite.hill.af.mil/reghtml/regs/far2afmcfars/fardfars/far/15.htm). All exchanges with offerors after receipt of proposals shall clearly identify the type of exchange (i.e., clarifications, communications, or discussions). Any exchange addressing a proposal deficiency shall clearly indicate that a deficiency exists.

5.6.4.2. If awarding without discussions, the contracting officer shall obtain contract clearance approval prior to contract award.

5.6.5. **Discussions.** [IG 5.6.5R1](#ig565r1)The primary objective of discussions is to maximize the Government’s ability to obtain best value, based on the requirement and the evaluation factors set forth in the solicitation. As a minimum, at the initiation of and again at the conclusion of discussions, the Source Selection Evaluation Team through the contracting officer shall indicate to, or discuss with, each offeror in the competitive range the following: (a) any adverse past performance information to which the offeror has not yet had an opportunity to respond, (b) uncertainties, and (c) weaknesses, (d) any deficiencies that have been identified during the evaluation, (e) strengths. This should be accomplished by providing the offeror its own mission capability, cost/price risk (if applicable), and Past Performance ratings. The final disclosure of ratings to the offeror prior to requesting final proposal revisions shall reflect the results of discussions with the offeror. [IG 5.6.5R2](#ig565r2)

5.6.5.1 When the evaluation will include a cost/price risk evaluation (see 5.5.4 above), the Source Selection Evaluation Team through the contracting officer shall indicate to, or discuss with, each offeror in the competitive range differences between the offeror’s proposed costs or prices and the government most probable cost for the same items with the goal of understanding these differences to the maximum extent possible. Discussions shall also include the uncertainty analysis methods and results. Conduct these discussions promptly so that each offeror has ample time to understand the government’s cost differences so that the offeror may adjust their cost or price proposal accordingly before or with submission of Final Proposal Revision. After developing an MPC for each offeror, the government shall analyze the differences between the offeror’s proposed price and the government generated MPC for that offeror. After analyzing these differences, the SSET shall assign a Cost/Price Risk rating to each offeror, as defined in Table 4 above.

5.6.5.2 For Oral Presentations, consideration should be given to declaring a competitive range and entering into discussions with offerors during the presentation of oral proposals. Successive competitive range determinations can be made after the initial presentations, if required. [IG 5.6.5.2](#ig5652) See [IG5315.102](http://farsite.hill.af.mil/reghtml/regs/far2afmcfars/af_afmc/affars/IG5315.102.docx), Oral Presentations, for assistance in using Oral Presentations.

5.6.6. **Final Proposal Revision and Evaluation.** [IG 5.6.6R1](#ig566r1) The contracting officer shall obtain contract clearance approval in accordance with [AFFARS 5301.9000](http://farsite.hill.af.mil/reghtml/regs/far2afmcfars/af_afmc/affars/5301.htm). The [Source Selection Authority](#definitions) shall then review all material and approve release of the Final Proposal Revision Request. The [Source Selection Evaluation Team](#definitions) shall complete the proposal evaluation, incorporating the information provided through discussions and in the Final Proposal Revisions. The evaluation criteria from Section M or equivalent provisions of the solicitation shall continue to be the basis for evaluation. [IG 5.6.6R2](#ig566r2)

**MP5315.308 -- Source Selection Decision (Documentation Requirements)**

6. **Decision Activities**

6.1 **A Decision Briefing** shall be conducted whenever the Source Selection Authority is other than the contracting officer. [IG 6.1](#ig61)

6.2. **The Source Selection Authority** shall --

6.2.1. Select the source or sources whose proposal offers the best value to the government. [IG 6.2.1](#ig621)

6.2.2. Base the decision on an integrated assessment of proposals against all source selection criteria in the solicitation. While the [Source Selection Authority](#definitions) may use reports and analyses prepared by others, the source selection decision shall represent the Source Selection Authority's independent judgment.

6.2.3. Document the supporting rationale in the [Source Selection Decision Document](#definitions) (see [7.12](#p712) below). [IG 6.2.3](#ig623)

6.3. **The Source Selection Evaluation Team Chairperson** shall, in conjunction with the contracting officer:

6.3.1. For all acquisitions over $100 million or as required by the Source Selection Authority, prepare the [Proposal Analysis Report](#definitions) (see [7.10](#p710) below). The report shall be signed by the [Source Selection Advisory Council](#definitions) Chairperson (if used) and Source Selection Evaluation Team chairperson.

6.3.2. Prepare the Source Selection Decision Document for the Source Selection Authority's signature.

6.3.3. Participate in debriefings to offerors.

6.3.4 If an SSAC is not used, the SSET chairperson shall make an award recommendation, based on the SSET’s evaluation, at the decision briefing. Rationale for the recommendation shall be based upon the evaluation criteria (Section M or equivalent provision) of the solicitation.

6.4. **The Source Selection Evaluation Team** shall present the results of the final proposal revision evaluations to the Source Selection Authority. The team shall prepare required source selection decision briefing charts that clearly summarize and justify the evaluation results. Briefing charts shall be suitable to serve as the official record of Source Selection Evaluation Team proceedings for source selections when more formal documentation, such as the Proposal Analysis Report, is not used. The results of the evaluation shall be presented to the Source Selection Advisory Council (if used) and to the Source Selection Authority. In the event that there is significant disagreement among the SSET members regarding the evaluation results that should be presented to the SSAC (if used) and the SSA, a minority opinion(s) shall also be presented at the decision briefing providing the SSA sufficient information to fully consider the minority view(s).

6.5. **The Source Selection Advisory Council** shall, with the assistance of the Source Selection Evaluation Team chairperson, provide the required comparative analysis of offers when the Source Selection Authority assigns the responsibility for preparing that analysis to the Source Selection Advisory Council.

6.5.1. **The Source Selection Advisory Council (if used)**  shall offer the source selection recommendation for the SSA’s consideration following evaluation of offeror’s Final Proposal Revisions, or to support an award-without-discussions decision. In the event that there is significant disagreement among the SSAC members regarding the recommendation that should be presented to the SSA, a minority opinion shall be presented providing the SSA sufficient information to fully consider the minority view. [IG 6.5.1](#ig651)

6.6. **The Contracting Officer** shall –

6.6.1. Obtain contract clearance approval prior to the SSA making a source selection decision in accordance with [AFFARS 5301.9000](http://farsite.hill.af.mil/reghtml/regs/far2afmcfars/af_afmc/affars/5301.htm).

6.6.2. Ensure unsuccessful offerors are debriefed in accordance with [FAR 15.505](http://farsite.hill.af.mil/reghtml/regs/far2afmcfars/fardfars/far/15.htm), [15.506](http://farsite.hill.af.mil/reghtml/regs/far2afmcfars/fardfars/far/15.htm), and [AFFARS 5315.506](http://farsite.hill.af.mil/reghtml/regs/far2afmcfars/af_afmc/affars/5315.htm). The contracting officer shall document the debriefing(s) provided to offeror(s). The debriefing summary must also include a record of offeror questions and government responses. [IG 6.6](#ig67)

6.6.3 For ACAT I & II source selections, complete the Source Selection Participants worksheet by using the participants’ information from an approved Source Selection Plan. Source Selection Participants include all members of and advisors to the SSAC, the SSET, and the PCAG. Do not include contractor participants. The completed worksheet will be submitted no later than 30 days after contract award or termination/cancellation of source selection to SAF/AQCK, [safaqck.workflow@pentagon.af.mil](mailto:safaqck.workflow@pentagon.af.mil). Click on the link below to download worksheet (you may need to copy and paste link into your web browser):

<https://www.my.af.mil/gcss-af/USAF/AFP40/d/s6925EC133CA00FB5E044080020E329A9/Files/5315/source-selection-participants-worksheet.xls>

7. **Documentation Requirements.** [IG 7](#ig7) Air Force source selection documents include:

7.1. **The Source Selection Plan.** The [Source Selection Plan](#definitions) and any revisions shall be maintained in the source selection file. [IG 7.1](#ig71)

7.2. **The Draft Request for Proposal.** When a Draft Request for Proposal is issued, it shall be included in the contract file along with all comments received from interested parties and government responses thereto.

7.3. **The Request for Proposal.** The final Request for Proposal is required, as well as any Amendments thereto including the Final Proposal Revision request, and shall be included in the contract file.

7.4. **Proposals.** Offeror proposals are to be included as submitted in the source selection file. The proposal, including all revisions, shall be annotated with the date of receipt. Rejected proposals, or portions thereof, shall be handled in accordance with the instructions to offerors (Section L or equivalent provision of the solicitation).

7.5. **Evaluation Worksheets and Summaries.** After each member of the evaluation team has completed his or her review of a proposal, the evaluation must be documented and included in the source selection file. [IG 7.5](#ig75)

7.5.1. **Interim Ratings (Competitive Range Brief and Final Proposal Revision Brief).** The rationale and justification for evaluation results and assignment of interim ratings developed for competitive range and final proposal revision briefings, will be fully, completely, and contemporaneously documented. This documentation includes the evaluation worksheets and summaries referred to in paragraph 7.5 and are in addition to information regarding the final evaluation results and ratings to be documented in the Proposal Analysis Report (PAR) required by paragraph 7.10 or the Simplified Source Selection Report required by paragraph 7.11.

7.6. **A Competitive Range Determination.**  When the [Source Selection Authority](#definitions) is other than the contracting officer, this determination may be documented in a briefing. Briefing information/charts shall be in sufficient detail to support the contracting officer recommendation andincluded in the source selection file. Include any documentation with the Competitive Range Briefing regarding approval to release [Evaluation Notices](#definitions), or enter into discussions. [IG 7.6](#ig76)

7.7. **Evaluation Notices.** Include all[Evaluation Notices](#sample05), responses, and Government evaluation thereof in the source selection file.

7.8. **Clearance Documentation.**  Clearance documentation in addition to the determination to award without discussions or the final proposal revision request approval and the approval to make a source selection decision shall be included in the contract file.

7.9. **Decision Briefing.** Whenever the [Source Selection Authority](#definitions) is other than the contracting officer, a source selection decision briefing is mandatory and shall be included in the source selection file. [IG 7.9](#ig79)

*Note: The decision briefing depicts the final assessment only (i.e. pertinent information obtained from Final Proposal Revisions to final ratings). While the Source Selection Evaluation Team will brief the resolution of prior deficiencies and weaknesses, the charts contain no indications of ratings assessed at the time of the Competitive Range determination and pre-Final Proposal Revision briefing. However, the Source Selection Authority may discuss with the team, any issues or remaining questions regarding the offerors’ proposals.*

7.10. **Proposal Analysis Report (PAR)**. Reference [IG5315.305](http://farsite.hill.af.mil/reghtml/regs/far2afmcfars/af_afmc/affars/IG5315.305.docx), the objective of this report is to document the results of the [Source Selection Evaluation Team](#definitions) evaluation and to provide the comparative analysis of competitive offers to the SSA. [IG 7.10R1](#ig710r1) The [Proposal Analysis Report](#definitions) includes the assessment of Cost or Price, past performance, mission capability, cost/price risk (if used), and includes the source selection recommendation (and if applicable, any minority opinion). [IG 7.10R2](#ig710r2) The Proposal Analysis Report shall be included in the source selection file.

7.11. **Simplified Source Selection Report .** The [Simplified Source Selection Report](#definitions) is required for all source selections $10 million and below and, at the discretion of the [Source Selection Authority](#definitions), may be used for all other source selections when a [Proposal Analysis Report](#definitions) is not used. For acquisitions less than $10 million, Section I of the report may be a streamlined [Source Selection Plan](#definitions) (signed by the Source Selection Authority), which includes a brief description of the requirements, description of the source selection organization, the evaluation factors with their relative importance, and the evaluation process and techniques to be used in evaluating proposals. For acquisitions greater than $10 million, attach the Source Selection Plan. This report shall be maintained in the source selection file. The objective of this report is to be simple, concise, and to utilize already existing documentation (e.g., Rating Team Worksheet) to the maximum extent practicable. The Simplified Source Selection Report is written incrementally as the source selection progresses. When the SSA is other than the Contracting Officer, include the evaluation team’s source selection recommendation and any minority opinion, to the SSA. [IG 7.11](#ig711)

7.12. **Source Selection Decision Document**. A [Source Selection Decision Document (SSDD)](#definitions) shall be prepared for all Air Force source selections; shall reflect the Source Selection Authority's integrated, comparative assessment and decision; and shall include the rationale for any business judgments- tradeoffs made or relied on by the Source Selection Authority- including benefits associated with additional costs. The Source Selection Decision Document shall be the single summary document supporting selection of the best value proposal consistent with the stated evaluation criteria; it shall clearly explain the decision and document the reasoning used by the Source Selection Authority to reach the decision. [IG 7.12](#ig712) See [IG5315.308](http://farsite.hill.af.mil/reghtml/regs/far2afmcfars/af_afmc/affars/IG5315.308.docx), Source Selection Decision Document (SSDD) Guide, for assistance in preparing a Source Selection Decision Document.

7.12.1. The Source Selection Decision Document is fully releasable to the Government Accountability Office and others authorized to receive proprietary and source selection information. When releasing a copy of the Source Selection Decision Document to offerors or to anyone not authorized to receive proprietary and source selection information, redacted material shall be limited to that which is proprietary and that which shall continue to be protected as source selection information. The need to redact such information is not a sufficient reason to refrain from preparing a properly written Source Selection Decision Document. [IG 7.12.1](#ig7121)

7.13. **Source Selection Debriefing Documents.** The source selection debriefing documents, as required in [AFFARS 5315.506](http://farsite.hill.af.mil/reghtml/regs/far2afmcfars/af_afmc/affars/5315.htm), shall be maintained in the source selection file.

8. **Definitions.**

8.1 “Deficiency” is a material failure of a proposal to meet a Government requirement or a combination of significant weaknesses in a proposal that increases the risk of unsuccessful contract performance to an unacceptable level ([FAR 15.001](http://farsite.hill.af.mil/reghtml/regs/far2afmcfars/fardfars/far/15.htm)).

8.2. "Evaluation notices (ENs)" are written exchanges with offerors for purposes of clarifications, communications, or discussions. [IG 8.1](#ig81)

8.3. “Mission capability” is comprised of the Mission Capability Technical Rating which expresses evaluation criteria that address technical, performance, or capability requirements and Mission Capability Risk Rating (MCRR). The MCRR assesses the degree to which an offeror’s proposed approach to achieving the Mission Capability Technical Rating Factor or Subfactor may involve risk of disruption of schedule, increased cost or degradation of performance, the need for increased government oversight, and the likelihood of unsuccessful contract performance.

8.4. “Performance confidence assessment” is an evaluation of the likelihood (or government’s confidence) that the offeror will successfully complete the solicitation’s requirements; the evaluation is based upon past performance.

8.5. "Performance Confidence Assessment Group (PCAG)" is a group of experienced government personnel assigned to accomplish the Performance Confidence Assessment.

8.6. "Proposal Analysis Report (PAR)" is a report that fully documents the results of the evaluation of each proposal and the comparative analysis of all proposals within the competitive range.

8.7. "Requirements documents" are all aspects of the Request for Proposal that convey the needs of the government to offerors, including Statements of Objectives (SOO), Statements of Work (SOW), Performance Work Statements (PWS), Technical Requirement Documents (TRD) and System Requirement Documents (SRD).

8.8. "Requiring office" is the entity (for example, a program management office or other organizational entity) responsible for translating user requirements into the requirements documents within the Request for Proposal that communicate those requirements to offerors.

8.9. "Simplified Source Selection Report” is a report in simplified format that documents the acquisition approach, Source Selection Plan, description of the services or supplies acquired, evaluation results, comparative analysis of offerors, and the Source Selection Decision Document.

8.10. "Source Selection Advisory Council (SSAC)" is a group of senior personnel who provide counsel during the source selection process and may prepare the comparative analysis of the Source Selection Evaluation Team's evaluation results, when directed by the Source Selection Authority.

8.11. "Source Selection Authority (SSA)" is the official designated to make the source selection decision.

8.12. "Source Selection Decision Document (SSDD)" is the document that reflects the Source Selection Authority's integrated assessment and selection decision.

8.13. "Source Selection Evaluation Team (SSET)" is the group of government and, if needed, approved non-government personnel, representing the various functional disciplines relevant to the acquisition. The Source Selection Evaluation Team evaluates proposals and reports its findings to the Source Selection Advisory Council (if used) and the Source Selection Authority.

8.14. "Source Selection Plan (SSP)" is a plan that describes how the source selection will be organized, how proposals will be evaluated and analyzed, and how source(s) will be selected.

8.15. "Strength" is a significant aspect of an offeror's proposal that has merit and exceeds specified performance or capability requirements in a way that is advantageous to the government, and either will be included in the contract or is inherent in the offeror's process.

8.16. “Uncertainty” is a doubt regarding whether an aspect of the proposal meets a material performance or capability requirement. It requires additional information from the offeror to further explain the proposal before the evaluator can complete his/her review and analysis and should generate the issuance of an EN. [IG 8.16](#ig816)

8.17 “Weakness” means a flaw in the proposal that increases the risk of unsuccessful contract performance. A “significant weakness” in the proposal is a flaw that appreciably increases the risk of unsuccessful contract performance ([FAR 15.001](http://farsite.hill.af.mil/reghtml/regs/far2afmcfars/fardfars/far/15.htm)).

Attachment 1

**SOURCE SELECTION NON-DISCLOSURE AGREEMENT**

Name: Grade:

Job Title: Organization:

Source Selection:

(or title of position, if used as an Annual Certificate IAW [AFFARS 5303.104-4](http://farsite.hill.af.mil/reghtml/regs/far2afmcfars/af_afmc/affars/5303.htm).)

Date:

Briefing Acknowledgment

1. I acknowledge I have been assigned to the source selection (or position) indicated above. I am aware that unauthorized disclosure of source selection or proprietary information could damage the integrity of this procurement and that the transmission or revelation of such information to unauthorized persons could subject me to prosecution under the Procurement Integrity Laws or under other applicable laws.

2. I do solemnly swear or affirm that I will not divulge, publish, or reveal by word, conduct, or any other means, such information or knowledge, except as necessary to do so in the performance of my official duties related to this source selection and in accordance with the laws of the United States, unless specifically authorized in writing in each and every case by a duly authorized representative of the United States Government. I take this obligation freely, without any mental reservation or purpose of evasion and in the absence of duress.

3. I acknowledge that the information I receive will be given only to persons specifically granted access to the source selection information and may not be further divulged without specific prior written approval from an authorized individual.

4. If, at any time during the source selection process, my participation might result in a real, apparent, possible, or potential conflict of interest, I will immediately report the circumstances to the Source Selection Authority.

5. All personnel are requested to check the applicable block:

I have submitted a current [OGE Form 450](http://www.usoge.gov/pages/forms_pubs_otherdocs/fpo_files/forms/fr450_04.pdf), Executive Branch Confidential Financial Disclosure Report, as required by [DODD 5500.07](http://www.dtic.mil/whs/directives/corres/pdf/550007p.pdf), Standards of Conduct.

I am not required to submit an OGE Form 450.

I have submitted a current [SF278](http://www.gsa.gov/Portal/gsa/ep/formslibrary.do?viewType=DETAIL&formId=D8518389B77405A28525710700646745), Executive Branch Confidential Financial Disclosure Report, as required by [DODD 5500.07](http://www.dtic.mil/whs/directives/corres/pdf/550007p.pdf), Standards of Conduct

I am not required to submit a Form [SF278](http://www.gsa.gov/Portal/gsa/ep/formslibrary.do?viewType=DETAIL&formId=D8518389B77405A28525710700646745)

OR

I am a non-government employee. I have signed a proprietary information non-disclosure agreement that has been included in the contract between my firm and the government that precludes me from divulging any proprietary data to which I may gain access during the evaluation of proposals.

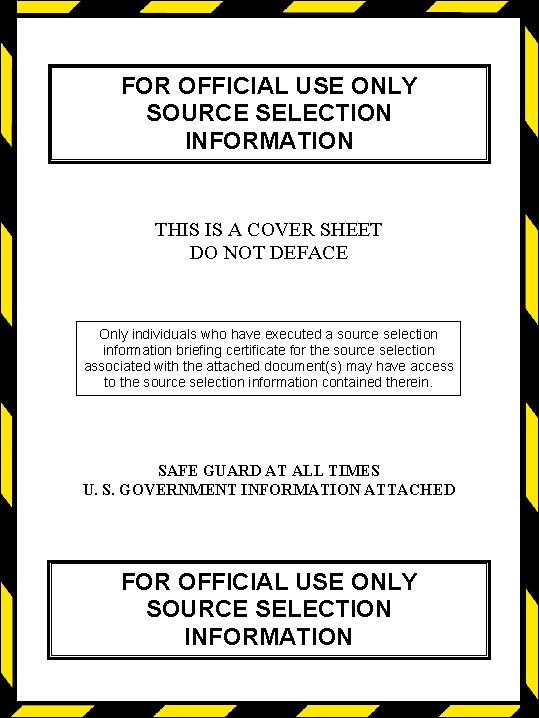
Neither I, nor anyone in my immediate family, have any financial interest in any company involved in this acquisition as either a prime contractor or as a subcontractor.

SIGNATURE: DATE:

**Debriefing Certificate**

I have been debriefed orally by as to my obligation to protect all information to which I have had access during this source selection. I no longer have any material pertinent to this source selection in my possession except material that I have been authorized in writing to retain by the SSA. I will not discuss, communicate, transmit, or release any information orally, in writing, or by any other means to anyone after this date unless specifically authorized to do so by a duly authorized representative of the United States Government.

SIGNATURE: DATE:



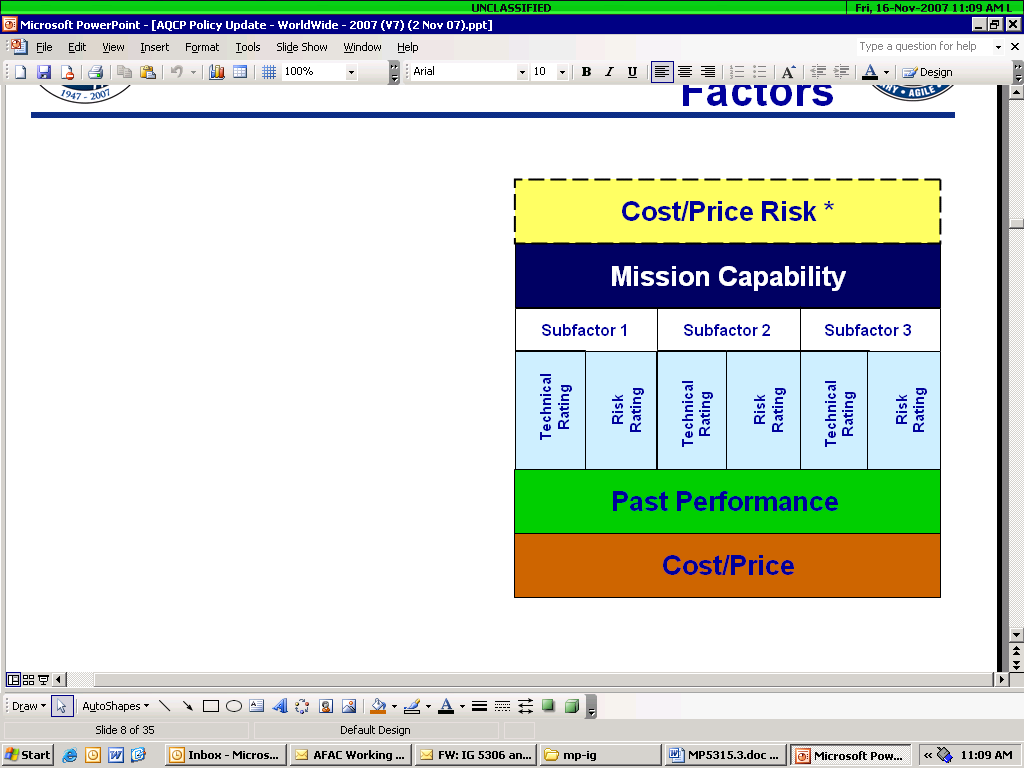
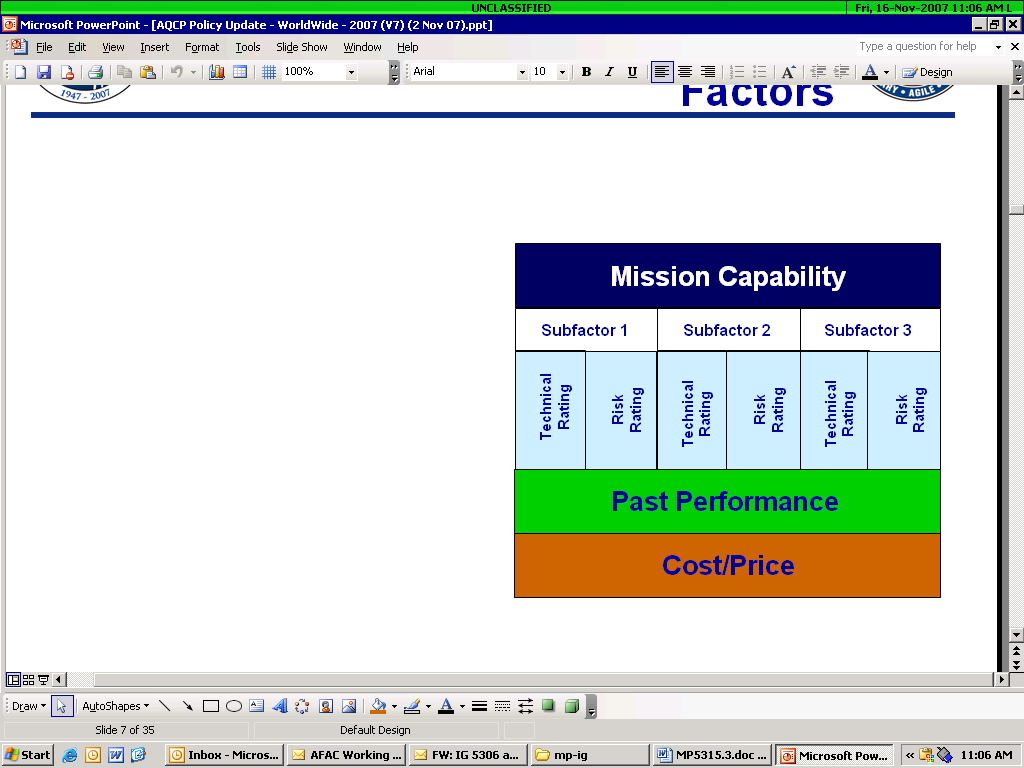
**SOURCE SELECTION EVALUATION MATRIX**

***This table is provided as Informational Guidance. It is a “Best Practice” example.***

**RATING TEAM WORKSHEET**

Typical evaluation table on Air Force Source Selections. Table does not indicate relative importance of factors.

\* For use when SSA has approved the use of a cost/price risk factor. Table does not indicate relative importance of factors.



***This template is provided as Informational Guidance. It is a “Best Practice” example.***

|  |  |
| --- | --- |
| OFFEROR: | INITIAL EVALUATION FINAL EVALUATION |
| **MISSION CAPABILITY**  TECHNICAL RATING**:**   BLUE (Exceptional)  GREEN (Acceptable)  YELLOW (Marginal)  RED (Unacceptable)  NARRATIVE**:** [Include strengths, uncertainties, and deficiencies (material failure to meet Government requirement). Explain how proposal exceeds or fails to meet requirement. If it exceeds the requirement, explain how it benefits the Air Force.]  RISK RATING**:** Indicate risk rating of low, moderate, high, or unacceptable for each subfactor, if used, and include weaknesses and deficiencies. Explain how each increase of risk contributes to the rating considering the potential for disruption of schedule, increased cost, or degradation of performance:   LOW  MODERATE  HIGH  UNACCEPTABLE  Optional :  LOW “+”  MODERATE “+”  HIGH “+”    NARRATIVE**:** | |
| **COST/PRICE RISK (IF USED)**  RISK ASSESSMENT**:** (Indicate risk rating of low, moderate, high)   LOW  MODERATE  HIGH  NARRATIVE**:** | |
| **PAST PERFORMANCE**  ASSESSMENT**:**   SUBSTANTIAL CONFIDENCE  LIMITED CONFIDENCE   SATISFACTORY CONFIDENCE  NO CONFIDENCE   UNKNOWN CONFIDENCE  NARRATIVE**:** | |
| **PRICE / COST**  TOTAL PRICE / COST**:** $ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  NARRATIVE**:** | |
| **EXCHANGES WITH OFFERORS** | |
| \_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  SIGNATURE (Contracting Officer) SIGNATURE (Lead Technical Evaluator) | |

**ANALYSIS WORKSHEET**

***This template is provided as Informational Guidance. It is a “Best Practice” example.***

***Source Selection:***

***Evaluator:*** ***Offeror:***

***Factor:*** ***Subfactor:***

***MISSION CAPABILITY (MC)***

***Component of Performance or Capability Requirement:***

***What is Offered:***

# ***TECHNICAL RATING***

*How Proposal Exceeds, Meets, or Fails to Meet Performance or Capability Requirements:*

***Strengths (MC):***  *(Start narrative with "Strengths:" )*

***Deficiencies (MC):*** *(Start narrative with "Deficiencies:" )*

***Uncertainties (MC):*** *(Areas requiring additional information)*

***RISK RATING***

***Significant Weakness (MC):*** *(Start narrative with “Significant Weakness:” )*

***Weaknesses (MC):*** *(Start narrative with "Weaknesses:" )*

***Deficiencies\*(MC):*** *(Start narrative with “Deficiencies:” )*

***Mitigation (MC):*** *(Start narrative with "Mitigation:" )*

***Evaluation Notice Required?***

\* A deficiency could be a result of a significant weakness (or combination of weaknesses) that is very likely to cause unmitigated disruption of schedule, drastically increased cost or severely degraded performance.

**SUBFACTOR SUMMARY**

***This template is provided as Informational Guidance. It is a “Best Practice” example.***

*\_\_\_ Initial Summary \_\_\_ Pre-Final Proposal Revision Summary \_\_\_ Final Summary*

***Source Selection:***

***Author:***

***Offeror:***

***Factor:***

***Subfactor:***

***Proposal Description:***

***MISSION CAPABILITY (MC)***

***Technical Rating:***

***Strengths Details:***

***Strengths Summary:***

***Deficiencies Details:***

***Deficiencies Summary:***

***Uncertainties (Areas Requiring Additional Info):***

***RISK Rating:***

***Deficiencies Detail\*:***

***Deficiencies Summary\*:***

***Mitigation Efforts/Weaknesses Details:***

***Mitigation Efforts/Weaknesses Summary:***

***Comments:***

***Reviewed by:***

\* A deficiency could be a result of a significant weakness (or combination of weaknesses) that is very likely to cause unmitigated disruption of schedule, drastically increased cost or severely degraded performance.

**EVALUATION NOTICE (EN)**

***This template is provided as Informational Guidance. It is a “Best Practice” example.***

***\_\_\_\_\_ FAR 15.306(a) Clarification\* Offeror*** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

***\_\_\_\_\_ FAR 15.306(b) Communications\* Control#*** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

***\_\_\_\_\_ FAR 15.306 (c) Discussions***

***\_\_\_\_\_ Deficiency***

\* Government will not accept proposal revisions as a result of Clarification or Communication exchanges

***RFP REFERENCE:*** *(Specify Request for Proposal paragraph number, Section M and Section L reference, etc.)*

***GOVERNMENT COMMENT****:*

*Factor*  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

*Subfactor* \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

***PROPOSAL REFERENCE:*** *(Specify offeror’s document, Proposal Volume, paragraph, and page number)*

***SUMMARY:*** *Description of issue in question and specific request for additional/supplemental information needed to clarify or correct the issue. Include references to the solicitation if necessary.*

***EVALUATOR:***  *(Note: The evaluator's name should not be included on the copy sent to the offeror.)*

***OFFEROR RESPONSE:***

***EVALUATOR ASSESSMENT OF OFFEROR RESPONSE:*** *Address impact (including impact on offeror ratings, if any) and evaluate response.*

**MP5315.3**

**Source Selection**

# **Informational Guidance**

### *Revised XXXX, 2011*

**2. Applicability**

2.1. Exempted acquisitions may use this procedure as guidance. Compliance with [FAR 15](http://farsite.hill.af.mil/reghtml/regs/far2afmcfars/fardfars/far/15.htm), [DFARS 215](http://farsite.hill.af.mil/reghtml/regs/far2afmcfars/fardfars/dfars/dfars215.htm), and [AFFARS 5315](http://farsite.hill.af.mil/reghtml/regs/far2afmcfars/af_afmc/affars/5315.htm) and related law, regulation, and policy is required in all competitive negotiated acquisitions.

2.1.2. AFMC policy is available at the [Air Force Research Laboratories Website](http://www.sbirsttrmall.com/).

2.1.5. Performance Price Tradeoff (PPT) is a process in which tradeoffs are conducted between past performance and price/cost for technically acceptable proposals. AF policy and Community Advice--Best Practices, available in the [AFFARS Library, Part 5315](https://cs.eis.af.mil/airforcecontracting/knowledge_center/Pages/5315-main.aspx), provide assistance on conducting PPT source selections.

**4. Pre-solicitation Activities**

Previously completed activities, such as market research ([FAR 10](http://farsite.hill.af.mil/reghtml/regs/far2afmcfars/fardfars/far/10.htm)) or acquisition planning ([Far 7](http://farsite.hill.af.mil/reghtml/regs/far2afmcfars/fardfars/far/07.htm)), though not discussed here are critical for successful acquisitions. When considering contractor versus government performance, refer to [FAR 7.3](http://farsite.hill.af.mil/reghtml/regs/far2afmcfars/fardfars/far/07.htm) and [OMB Circular No. A-76](http://www.whitehouse.gov/omb/circulars/a076/a76_rev2003.pdf) (revised), Performance of Commercial Activities, as supplemented.

4.1. Source Selection Authority Designations [[AFFARS 5315.303(a)](http://farsite.hill.af.mil/reghtml/regs/far2afmcfars/af_afmc/affars/5315.htm)].

4.1.1.3. While the Source Selection Authority will officially establish the source selection team when he/she approves the Source Selection Plan, the program manager or contracting officer usually uses a group to complete activities prior to the plan approval. This group drafts the Source Selection Plan, recommends the team structure, and should become key individuals on the source selection team. Your recommendation should establish the team size and organizational structure that is necessary to perform the evaluation of proposals based upon the complexity, size, visibility, and other considerations.

Organization Structure:

(1) For PEO acquisitions or source selections greater than $100 million, the team structure normally consists of the Source Selection Authority, Source Selection Advisory Council, the Source Selection Evaluation Team, and any advisors. The Source Selection Evaluation Team typically consists of technical/service/programmatic evaluators, contracting officer/buyer, Performance Confidence Assessment Group, cost or price analyst(s), and advisors. The Source Selection Evaluation Team should include the minimum number of evaluators necessary and may be supplemented with advisors as required. Remember though, senior leaders cannot perform multiple leadership roles in source selection for any ACAT or major service (Category I and IA) acquisitions such as functioning as both advisor and evaluator.

(2) For less complex acquisitions, it may be appropriate for several roles to be fulfilled by a single individual resulting in smaller, simpler teams such as the following:

(a) A source selection team consisting of only the contracting officer or of one technical member and the contracting officer; or

(b) A source selection team consisting of the contracting officer as Source Selection Authority and the Source Selection Evaluation Team who, in turn, may consist of technical/service/programmatic evaluators, cost or price analyst(s), and, perhaps, a Performance Confidence Assessment Group.

If the Source Selection Team consists of one, two people, or a few individuals, then they are responsible for completing their respective areas for the source selection. For example, if the Contracting Officer and a technical lead are the only persons on the Source Selection Team, then the Contracting Officer is the Source Selection Authority and the two are responsible for completing all required activities of the Source Selection Evaluation Team.

4.1.1.5. For example, a SSAC member cannot be the PCAG chairman or a member of the SSET. An SSET member may, however, evaluate multiple aspects of the proposals as long as the member is not on the SSAC and is not the chair of multiple teams within the SSET.

4.1.2. A Source Selection Advisory Council may be used when the advice and oversight of senior, independent reviewers is desirable and justifies the resources used. Typically, most on the council will have source selection experience and as a whole the council will represent the primary stakeholders in the acquisition, including the users.

4.1.3.2. Use of a Performance Confidence Assessment Group is at the discretion of the Source Selection Authority for source selections less than $100 million.

4.1.3.3. Some SSAs want to be kept informed regarding personnel changes to the team; therefore, teams may notify the SSA of such changes as they occur.

4.1.4.2. The Source Selection authority usually requests the Contracting Officer to manage the protection of Source Selection Information. Special emphasis should be made to examine the application of information technology. Opportunity for unintentional release of information increases with today’s more robust software programs. Extra measures such as secondary reviews before files are released via electronic means may be needed to ensure all documentation is handled properly. A file or Power Point presentation could contain embedded information that is Source Selection Sensitive.

4.1.6. Team members should be assigned by managers who have the authority to commit resources, especially when significant time will be required. To reinforce that Government personnel assigned as a source selection team member shall consider the duty as their primary responsibility, consider placing the individuals on “orders” signed by the Commander.

4.2.1.2.. Because annual Non-Disclosure certificates are normally used by members assigned to MAJCOM and Secretariat Staffs, contracting officers should verify those members either have a correct certificate on file prior or have completed a new certificate for the specific acquisition prior to releasing any source selection information to those individuals. Included with the Source Selection Non-Disclosure Agreement (Attachment 1) is a sample source selection cover sheet.

4.2.2.1. In addition to the documents enumerated in [FAR 3.104-3](http://farsite.hill.af.mil/reghtml/regs/far2afmcfars/fardfars/far/03.htm), the following documents are usually considered source selection information.

(1) Justifications for not issuing a solicitation to specific sources as a result of screening criteria. The information pertaining to a specific source is releasable to that source

(2) All proposals and amendments or alternative proposals submitted by each offeror, including a summary of any oral presentation.

(3) Any information marked proprietary by an offeror unless that offeror authorizes its release.

(4) Evaluation reports including narrative assessments and cost or price analysis.

(5) Any correspondence sent to offerors by the Source Selection Evaluation Team during the evaluation and the responses to the correspondence.

(6) Company specific past performance information.

(7) Completed questionnaires regarding past performance showing the evaluator’s name.

Source Selection Plans are considered source selection information. However, only a few areas of the plan cause the whole plan to be considered source selection sensitive. In order to drive transparency and facilitate open communication with industry, the Contracting Officer should consider redacting portions of information in the source selection plan. Once these areas such as the source selection team membership are removed, the plan should not be considered source selection information. When the source selection plan contains no source selection information or where the plan is appropriately redacted, contracting officers may release the plan to offerors.

4.3.1. It is prudent to perform some form of Risk Assessment for all competitive acquisitions in order to identify high-risk areas, to determine discriminators for Source Selections, and to identify incentive focus areas. These discriminators should be used to establish the evaluation subfactors. Subfactors need to be kept to a minimum and will result in a more efficient source selection. After the government’s initial look, it is important to obtain industry input on the Risk Assessment results. Risk Assessment results should be briefed as a part of any Acquisition Strategy briefing.

4.3.2. (ref.1) It is critical that Industry understands what cost models (to include uncertainty analysis) and methodology we will be using as early as practical. The goal of these discussions is to fully understand the reasons for the magnitude of the differences between an offeror’s proposed costs or prices and the government most probable cost by the end of the source selection; including key cost elements. The end result should be detailed cost data and narrative bases of estimates by WBS element that are fully understood by both parties prior to contract award.

4.3.2. (ref.2) Two different government estimates are generally involved for source selections. A Program Office Estimate (POE) is generally completed prior to the RFP release and a Most Probable Cost (MPC) is completed during the evaluation. The POE is the government’s estimate based on the government’s assumed configuration, while the MPC is the estimate in source selection based on the contractor’s proposed solution. In order to develop the governments POE prior to RFP release, the first thing that must be developed is a draft Work Breakdown Structure (WBS) for the program. This draft WBS provides a standard taxonomy for all the tasks (or components) and should use Mil Handbook 881A as a starting point. This WBS should serve as the starting point for MPC discussions with potential offerors. This draft WBS may be altered as the result of early and up-front communications with potential offerors. The final program WBS should be finalized as part of the RFP. Offerors may change the WBS to accommodate unique tasks or components of an offeror’s technical approach. The early discussions with offerors should reduce the WBS changes to the unique aspects of the offeror’s approach and assist the evaluator in making “apples-to-apples” comparisons of individual proposals to the MPC.

4.3.3.4. Early involvement with the applicable industry sector is highly encouraged from the date of requirement identification through the date of final Request for Proposal release ([FAR 15.201](http://farsite.hill.af.mil/reghtml/regs/far2afmcfars/fardfars/far/15.htm)). This early industry involvement and openness are the cornerstones of the Air Force’s enhanced cooperative relationship with industry. Timely release of information to industry is essential to maximize the value of their inputs to the planning, requirements generation, and acquisition processes. This involves engaging industry during the drafting of solicitations through group and one-on-one meetings and contracting business opportunity sites on the World Wide Web or other means. It may also include providing relevant program and/or estimated contract budget information (either approved or tentative) unless deemed inappropriate by the Source Selection Authority.

4.3.3.5. This would be the place to include approvals such as the Contracting Officer has the authority to release clarification and communication ENs after the appropriate subfactor chief, legal advisor, and SSET chair have reviewed the ENs.

4.3.3.8. Once approval to use non-government advisors as described in [FAR 37.2](http://farsite.hill.af.mil/reghtml/regs/far2afmcfars/fardfars/far/37.htm) has been granted, the PCO is primarily responsible for ensuring that all necessary steps are taken to protect proprietary information that may be included in any proposal. This will generally include a notification (see AFFARS 5315.305(c)(2)(iii)) to offerors in Section L that A&AS contractors will be used by the government in the evaluation of offers, and will specifically address each contractor by name. The PCO shall also ensure that the contracts on which A&AS personnel were made available include the necessary non-disclosure agreements and that each A&AS contractor employee participating in the source selection has signed both a non-disclosure agreement as well as the Source Selection Non-Disclosure Agreement. If the offerors do not object to participation of A&AS contractors, in most cases these precautions should be sufficient to ensure that the government’s interests are protected against the willful disclosure of proprietary information.

Should a potential offeror object to the use of non-government advisors, the procedures in [AFFARS 5315.305(c)(2)(v)](http://farsite.hill.af.mil/reghtml/regs/far2afmcfars/af_afmc/affars/5315.htm) apply. If an A&AS contractor employee fails to provide the necessary non-disclosure agreements, or should he/she refuse to sign the Source Selection Non-Disclosure Agreement, the PCO should consult with the legal office and SSA regarding the possible exclusion of the employee from the SSET.

4.3.6. Typically, the entire Source Selection Advisory Council will review the Source Selection Plan. However, timeliness or other factors may require an abbreviated review.

4.3.8. The [Air Force Past Performance Evaluation Guide](http://farsite.hill.af.mil/reghtml/regs/far2afmcfars/af_afmc/affars/IG5315.305(a)(2).docx) provides a discussion of recommended preliminary activities for a past performance review.

4.4. (ref.1) This portion of Section M or the equivalent [FAR 12](http://farsite.hill.af.mil/reghtml/regs/far2afmcfars/fardfars/far/12.htm) solicitation provision establishes how the government will make its selection for award; how the factors interrelate; and the number of awards contemplated. It tells the offeror how the overall source selection decision will be made.

4.4. (ref.2) The team should ensure those areas considered a high risk in the requirements risk assessments are addressed in the factors/subfactors.

4.4. (ref.3) When developing the evaluation criteria, you often hear the term "discriminators" used. “Discriminators” are the significant aspects of an acquisition that are expected to distinguish one proposal from another, thus having an impact on the ultimate selection decision. By using these discriminators, the source selection team can provide the Source Selection Authority with an evaluation that distinguishes among competing proposals in those areas the government believes are most important. This facilitates selecting the offeror(s) most likely to deliver the best value to the government and to perform the resulting contract(s) successfully.

4.4. (ref.4) Decide what’s important or risky (from requirements and risk analysis); determine the evaluation factors and subfactors required to discriminate between offerors regarding the important or risky parts of the program or effort (basis for the evaluation criteria, Section M or equivalent solicitation provision), and then determine what information to be requested in order to assess the offeror’s ability to address the important or risky areas (basis for Instructions to Offerors, Section L or equivalent solicitation provision).

4.4.1.1.(ref 1) The mission capability factor (or mission capability subfactors when subfactors are established) should be constructed to focus on the technical or service requirements that are most likely to be key discriminators during the source selection evaluation and should reflect the results of the program risk assessment prior to the RFP development. They should focus on areas not only where significant differences in proposals are anticipated, but where these critical areas are of sufficient benefit to the customer and represent the high risk areas of the program. Generally, the factor/subfactors should not describe requirements in “solution oriented” terms, but rather in “performance based” terms; state specifically what capability is to be evaluated; and for the measure of merit, be clear and as specific as possible in what the offeror must demonstrate in their proposal. If a technical or service area is important to ensure compliance with the contract, but not likely to result in discrimination between proposals, the area should not be identified as a subfactor under mission capability. For required consideration of small business participation or bundling issues, reference [FAR 15.304(c)(3)(iii), (c)(4), and (c)(5)](http://farsite.hill.af.mil/reghtml/regs/far2afmcfars/fardfars/far/15.htm) and [DFARS 215.304(c)](http://farsite.hill.af.mil/reghtml/regs/far2afmcfars/fardfars/dfars/dfars215.htm#P107_3559).

4.4.1.1 (ref 2) Where appropriate, teams should ensure evaluation criteria allow offerors to exceed requirements in a way that is advantageous to the government and either will be included in the contract or is inherent in the offerors process.

4.4.1.2. Consider the importance of the past performance factor during the Acquisition Strategy Development Process. It should be addressed as an individual topic during the Acquisition Strategy Panel (ASP). [FAR 15.304(c)(3)](http://farsite.hill.af.mil/reghtml/regs/far2afmcfars/fardfars/far/15.htm) requires that past performance be evaluated in “all source selections for negotiated competitive acquisitions expected to exceed the simplified threshold” unless the contracting officer documents the reason past performance is not an appropriate evaluation factor. Normally, the past performance factor should be a significant evaluation criterion. Past performance information to be included in the evaluation is within the broad discretion of the Source Selection Authority and should be tailored to the circumstances of each acquisition and may include completed contracts, ongoing contracts, or other effort accomplished by the offeror. While developing the Request for Proposal, offerors should be informed of the information to be used to assess past performance (subject to the restriction in [FAR 15.306(e)(4)](http://farsite.hill.af.mil/reghtml/regs/far2afmcfars/fardfars/far/15.htm)) and be given the opportunity to recommend other information, if appropriate, that will provide recent and relevant information. Since the evaluation of past performance often takes longer than other aspects of the evaluation, consider including a requirement for submission of past performance information earlier than the closing date of the Request for Proposal. Submission of past performance information may be requested as early as reasonable after issuance of solicitation. Offerors should be instructed to submit a list of specific contracts for assessment. Have the offeror include as a minimum, the following information (or equivalent): (1) description of the product/services being provided; (2) name, address, and phone number of the contracting officer; (3) name, address, and phone number of current program manager (if applicable); (4) contract numbers and dates of performance, and (5) name, address, and phone number of current Administrative Contracting Officer. We recommend not invoking the late proposal provision for this information as our goal is to increase competition, not eliminate it. However, contracting officers should consider any past performance information submitted as part of the offer.

4.4.1.3.1. For ACAT I programs, the MPC may include an analysis of the uncertainties inherent in any acquisition, from those related to the cost estimating methods chosen, to those associated with the technical and programmatic assumptions of the program. One way of defining MPC is the most frequently occurring value (or mode) resulting from the analysis. The application of the various statistical techniques inherent in uncertainty analysis will result in a mathematically correct most probable cost, as well as a range (or distribution) of possible costs from which confidence levels may be determined. Additionally, cost uncertainty described in this paragraph means the uncertainty and risk inherent in the cost estimating process, not the uncertainty referenced in Table 1 and defined in paragraph 8.16. Techniques for cost uncertainty analysis are described in the [Air Force Cost Risk and Uncertainty Handbook](https://cs.eis.af.mil/airforcecontracting/knowledge_center/Documents/Other_Pubs/Other_Guides/cost.risk.handbook.pdf).

4.4.1.4. (ref 1) The purpose of this risk rating is to provide information to the SSA that allows selection of an offeror who proposed a rational and realistic cost for the work to be accomplished. Through the RFP, the Air Force team must communicate to all offerors our deep concern for risk to our programs that is associated with overly optimistic or unrealistic cost or price proposals. We must clearly convey to all offerors that submitting costs or prices based on unrealistic or overly optimistic development outcomes may result in that offeror not being selected for award. This optional evaluation criterion may be particularly suited for use in ACAT programs in the Engineering and Manufacturing Development (EMD) phase using a cost-reimbursement contract type, where the Air Force is concerned that offerors may understate contract costs to obtain contract award.

4.4.1.4. (ref 2) The Government should state in the RFP the general methods and/or tools that will be utilized when evaluating cost/price during the source selection. The discussions should have already occurred during market research, industry days, and have been part of the draft RFP. Due to the uncertain nature of source selection evaluation, the methods and/or tools should be described in general terms in order to maintain the flexibility to apply any commonly used methods or tools as appropriate.

4.4.2. (Ref 1) If the solicitation states the individual importance of factors, then it must state the individual importance of all factors, including price. For example, Past Performance is more important that Price, which is more important than Mission Capability

4.4.2. (Ref 2) If threshold and objective performance requirements are identified in the Request for Proposals, you must communicate to offerors how a value analysis will be performed, comparing perceived benefit to the government against associated cost or price. Generally, offerors' proposals that exceed threshold performance requirements provide added value to the government. However, the Source Selection Authority must determine in accordance with the evaluation factors and subfactors whether exceeding the objective performance requirements at an associated cost or price provides the best overall affordable benefit to the government. The evaluation Factors/Subfactors and their order of importance must be drafted to reflect the government's intent relative to trade-offs. Although evaluation criteria must be tailored to reflect the specific requirements of a particular acquisition, it should reflect one of the following three alternatives:

(1) Identify the required threshold performance requirements but not any objective performance requirements and inform offerors that any features or technical offerings that enhance the system will be given evaluation credit in the best value determination.

(2) Identify both threshold performance requirements and objective performance requirements and explicitly state that the government reserves the right to evaluate and give evaluation credit for the proposed features that exceed either the stated thresholds or objectives.

(3) Identify both threshold performance requirements and objective performance requirements and explicitly state that the government reserves the right to evaluate and give evaluation credit for the proposed features that exceed the stated thresholds and offerors will not be given credit for performance beyond the objectives identified.

4.4.3. Often questions arise concerning how to treat those contract requirements not included as individual evaluation factors or subfactors. The statement required in [AFFARS 5315.305(a)](http://farsite.hill.af.mil/reghtml/regs/far2afmcfars/af_afmc/affars/5315.htm) addresses this concern. If a review is desired for some items, e.g., higher level inspection criteria, then those items could be addressed as pass/fail.

4.4.4. An example of such an alternative is the use of schedule in trade-offs where a Qualified Bidders List exists. In circumstances where schedule is a mission essential consideration, such as when production lead time extends beyond the need date, the Source Selection Authority may wish to conduct trade-offs between price and schedule for technically acceptable proposals from offerors whose past performance demonstrate their ability to deliver on accelerated schedules. In this procedure proposal risk is assumed to be a non-discriminator and the past performance evaluation may be limited in scope.

4.5. A Draft Request for Proposal (if required by MAJCOM guidance, or desired by the Source Selection Authority) consistent with the Acquisition Strategy and the draft Source Selection Plan should be developed and made available to potential offerors as early as practicable. The Draft Request for Proposal can be provided incrementally as sections become available, including the proposed evaluation factors and subfactors, and industry comment should be encouraged. When all issues with the Draft Request for Proposal and/or the Source Selection Plan have been resolved to the satisfaction of the Source Selection Authority, and all required reviews have been accomplished, then the final Request for Proposal may be released to potential offerors. Remember to include the clause at [FAR 52.215-1](http://farsite.hill.af.mil/reghtml/regs/far2afmcfars/fardfars/far/52_215.htm) if the Source Selection Authority, in accordance with the approved Source Selection Plan, may determine to limit the number of proposals in the competitive range for efficiency purposes.

Maximum use of electronic media for Request for Proposal issuance, proposal submission, and proposal evaluation is encouraged. The instructions should also specify the format required by the government to ensure the readability of the information and to facilitate evaluation of the proposals.

4.5.1. If the Source Selection Authority requires a briefing prior to the Request for Proposal release, the following items should be presented along with or emphasized within the Source Selection Plan:

(1) Confirmation that all required approvals have been obtained (e.g., LCMP/SAMP/AP, etc.)

(2) Resolution of all issues from the acquisition strategy meeting and significant issues from other sources, if any

(3) Confirmation of commitments for availability of manpower for the evaluation process

(4) Final demonstrated traceability between risks, primary requirements that will be meaningful discriminators, funding, evaluation factors and subfactors, and information requested in the instructions to offerors. (The “draft” or preliminary traceability is usually presented to the Acquisition Strategy Panel.).

**5. Evaluation Activities**

Proposal evaluation is an assessment of the proposal and the offeror's ability to perform the prospective contract successfully. The evaluation enables the selection of the offeror whose proposal represents the best value for the government.

5.4. (ref 1) Upon receipt of proposals, the contract team member(s) should ensure that each offeror has complied with the page restrictions outlined in the Request for Proposal and has included all required documentation (i.e. representations, certifications, Small Business Subcontracting Plan (if required), etc.). Each team member should begin by reading the Request for Proposal or solicitation, specifically the Evaluation Criteria (Section M or equivalent provision) and each offeror’s entire proposal. It is often helpful to make notes as a memory jogger to be used when documenting the evaluation such as in the Rating Team Worksheet or in an electronic source selection tool. (The use of [electronic source selection evaluation tools](https://cs.eis.af.mil/airforcecontracting/knowledge_center/Documents/AFFARS_Library/5315/source-selection-tools.ppt) is strongly encouraged for more complex acquisitions.) Paragraph 7 of this procedure describes how evaluation results should be documented.

5.4. (ref 2) It is helpful, perhaps even necessary, for evaluators to keep the rating and evaluation criteria and definitions visible throughout the evaluation process. Use of an evaluation matrix or factor aid is a common practice.

5.5.1. When performing the mission capability evaluation, evaluators must ensure that the narrative assessment focuses on the offeror’s proposal as it relates to the evaluation criteria (Section M or equivalent provision of the solicitation), not as it compares to other offerors’ proposals. The evaluation must be based solely upon information gathered in the source selection process. Evaluators must guard against making assumptions relative to any individual offeror’s proposal. [See [FAR 15.305(a)(5)](http://farsite.hill.af.mil/reghtml/regs/far2afmcfars/fardfars/far/15.htm) for small business evaluation considerations.]

When considering a blue rating, recognize that blue is earned based upon the magnitude of the additional benefit(s) to the government for the strength(s). The documentation should describe the magnitude of the benefit(s) of the strength(s). Keep in mind that the mere existence of a single strength does not necessarily merit a blue rating; though a blue may be warranted should that strength provide considerable benefit to the government. Conversely, a number of strengths may not merit a blue rating if the collective benefit is relatively minor. In any case, the documentation in the source selection record should describe the magnitude of the benefit(s) of the strength(s).

5.5.1.1. (ref 1) While the mission capability technical rating could also be affected by any identified uncertainties, by the time the final proposal revisions are requested, any uncertainties should have been resolved.

5.5.1.2. (ref 1) Evaluation teams need to address any risk mitigators. This could provide for more of a differentiation between proposals and a more meaningful tradeoff assessment for the source selection authority. Any identified mitigators should reduce the potential for disruption of schedule, increased cost, or degradation of performance, and will either be included in the contract or is inherent in the offeror’s process. The sample analysis worksheets include areas to discuss offeror’s mitigation efforts that are identified.

5.5.1.2. (ref 2) Some source selection team members are unsure of what would constitute a specific risk rating. There is also a possibility that offerors are equally unsure of how their approach may garner a certain risk rating. In order to better communicate how certain technical approaches would be viewed in terms of risk, the following guidance was included to give individuals a frame of reference. Some teams have included these in the RFP so that offerors would realize how approaches would be viewed by the Government. An aspect of a proposal that has been identified as an uncertainty or deficiency under Mission Capability could result in a Moderate, High, or even Unacceptable risk rating. This appropriately documents the failure (or uncertainty) to meet a requirement and the resulting risk to schedule, cost and/or performance. Other times, the proposal may meet or exceed requirements, but the approach to meeting/exceeding the requirements involves risk to schedule, cost and/or performance and will also drive a Moderate, High or even Unacceptable risk rating. The following are examples for what would be the basis to have certain assigned risk ratings:

(1) For a weapon system:

(a) If the offeror has not demonstrated the maturity of the proposed system, subsystems and components to a sufficient level for the acquisition phase of the program and the proposed cost and schedule are inadequate to deliver the proposed capability, then a “High Risk” or “Unacceptable” rating would likely be assigned. Indicators could include: (i) more than one key technology is at a Technical Readiness level (TRL) less than 6; (ii) a Preliminary Design Review (PDR) resulting in more than one waiver or significant action item; and (iii) integration and test efforts are not planned in detail so the Integrated master Plan/Integrated Master Schedule (IMP/IMS), Work Breakdown Structure (WBS), and Integrated Baseline Review (IBR) are insufficient to establish cost and schedule targets.

(b) If the offeror has demonstrated the maturity of the proposed system, subsystems and components to a sufficient level and there is a moderate expectation that the proposed mission capability will be achieved within the proposed cost and schedule, then in all likelihood a “Moderate Risk” rating would be assigned. Indicators could include key TRL levels at 6 with acceptable system engineering approaches and suppliers identified, but some differences exist between government estimates of costs, schedule, or other

aspects of the offerors submission.

(c) If the offeror has clearly demonstrated the maturity of the proposed system, subsystem and components to a high level and there is a high expectation that the proposed mission capability will be achieved within the proposed cost and schedule, then a “Low Risk” rating would likely be assigned. Indicators could include: (i) all technologies required for the technical solution are at TRL 7 or greater; (ii) PDR is complete with no actions or waivers; (iii) scope of integration and test efforts are benchmarked and are reflected in a robust IMP/IMS: and (iv) contractor’s plan reflects risk management and a methodology to conduct iterative trade studies to offer options as needed to complete the program within target costs and schedule.

(2) For a service:

(a) If an offeror’s proposed approach to providing the required services has not been attempted or demonstrated to be successful in either a commercial or non-commercial DoD environment, then a High or Unacceptable risk rating may be appropriate, particularly if the required services are considered mission-essential. Indicators may be a staffing plan that appears to have an inappropriate span of control or a plan that appears to rely on extensive cross-utilization of personnel. If an offeror proposes an approach to operation and maintenance of a mission system involving transition from a legacy system to an updated system, without a testing or overlapping transition period, this would be rated “high risk” or “unacceptable.”

(b) If an offeror’s proposed approach to providing the required services has been successfully demonstrated in a commercial environment but never used for a DoD requirement, then a Moderate risk rating may be appropriate. An indicator may be an implementation plan that does not allow adequate time to have equipment and properly cleared personnel in place to start performance.

(c) If an offeror’s proposed approach to providing the required services has been successfully demonstrated and proven to be effective in satisfying a DoD requirement, then a Low risk rating may be appropriate. Indicators would be proposed staffing with proven processes and implementation plans that reflect the offeror’s technical expertise concerning the requirement. Any identified risks would have sound mitigation plans in place.

5.5.2. (ref 1) Information obtained in the past performance evaluation often has a bearing upon the overall consideration of other factors. For example: Consider a contractor who proposed to deliver an emerging technology to fill a contract requirement. The proposed approach promises tremendous benefit for the government, hence the mission capability technical rating for the specific subfactor is BLUE; but because the technology is unproven, the mission capability risk rating for that same subfactor is HIGH. A review of the offeror’s past performance, however, reveals that the offeror routinely matures emerging technology and takes it to market -- on schedule and under budget. In his or her integrated assessment the Source Selection Authority may consider this information and effectively lower the proposal risk from HIGH to MODERATE or LOW. Such a conclusion must be fully documented.

5.5.2. (ref 2) The past performance evaluation should concentrate on assessing the delivery of an offeror’s products and/or services, and be tailored to the mission capability factor/subfactors, Cost/Price factor, and other solicitation requirements that if not successfully accomplished could result in disruption of schedule, increased costs, or poor performance.

Early identification and use of past performance information to enable government evaluators to focus on this measure of the performance confidence assessment is critical. The past performance evaluation should concentrate on those aspects of the instant acquisition most critical to overall success. Evaluation of offerors' performance should focus on demonstrated performance in these specific areas. Evaluators should consider mitigating circumstances, such as process changes, that have resulted in improvements to previous performance problems. However, process changes should only be considered when objectively measurable improvement in performance has been demonstrated as a result of the changes.

It is important to remember that “past performance” and “experience” are not the same thing. Past performance evaluation is used to determine how well an offeror has performed previous efforts; experience is an indication of how often and the number of years (or months) an offeror has performed similar efforts, not necessarily how well the offeror performed.

Past performance is judged based on the whole record and not solely on the number of records. For example, an offeror with 30 relevant and recent past performance evaluations is not automatically superior to an offeror with only 10. It is unlikely that a straight comparison of the number of submissions should be the driving factor of the rating.

5.5.2. (ref 3) The [Air Force Past Performance Evaluation Guide](http://farsite.hill.af.mil/reghtml/regs/far2afmcfars/af_afmc/affars/IG5315.305(a)(2).docx) provides step-by-step guidance on accomplishing a Past Performance evaluation.

5.5.2. (ref 4) After reviewing the list of information provided by the offeror and the information gathered from other sources, the evaluation should concentrate upon recent and relevant contracts/programs/effort that will permit an in depth evaluation. More recent and more relevant performance usually has greater impact in the performance confidence assessment than less recent and less relevant performance. When determining the extent to which a referenced effort (e.g. contract or delivery order) is relevant, consideration should be given but not limited to such things as product or service similarity, product or service complexity, contract type, program or lifecycle phase, contract environment, division of company proposing, and subcontractor interaction. The evaluation should take into account past performance information regarding predecessor companies, key personnel who have relevant experience, or subcontractors that will perform major or critical aspects of the requirement when such information is relevant to the instant acquisition. The [Air Force Past Performance Evaluation Guide](http://farsite.hill.af.mil/reghtml/regs/far2afmcfars/af_afmc/affars/IG5315.305(a)(2).docx) provides a detailed discussion and examples of how to assess recency and relevancy.

Special consideration should be given to subcontractor past performance evaluation in teaming arrangements and when significant subcontracting effort is proposed. The FAR, as supplemented, states that when the solicitation includes the clause at [FAR 52.219-8](http://farsite.hill.af.mil/reghtml/regs/far2afmcfars/fardfars/far/52_215.htm) or [FAR 52.219-9](http://farsite.hill.af.mil/reghtml/regs/far2afmcfars/fardfars/far/52_215.htm), the evaluation shall include the past performance of offerors in complying with subcontracting plan goals for the affected concerns, monetary targets for small and small disadvantaged business participation, and notifications submitted under [FAR 19.1202-4(b)](http://farsite.hill.af.mil/reghtml/regs/far2afmcfars/fardfars/far/19.htm) (see also [FAR 15.305(a)(2)(v)](http://farsite.hill.af.mil/reghtml/regs/far2afmcfars/fardfars/far/15.htm) and [DFARS 215.305(a)(2)](http://farsite.hill.af.mil/reghtml/regs/far2afmcfars/fardfars/dfars/dfars215.htm#P131_6012)).

5.5.2.2. Offerors without a record of relevant past performance or for whom information on past performance is not available or the offeror’s performance record is so limited that no confidence assessment rating can be reasonably assigned will not be evaluated favorably or unfavorably. [[FAR 15.305(a)(2)(iii) & (iv)](http://farsite.hill.af.mil/reghtml/regs/far2afmcfars/fardfars/far/15.htm)].

5.5.3 (ref 1). Reference [FAR 15.305(a)(1))](http://farsite.hill.af.mil/reghtml/regs/far2afmcfars/fardfars/far/15.htm).

The cost or price evaluation factor is normally limited to an assessment of reasonableness and in certain cases, realism (reference [FAR 15.4](http://farsite.hill.af.mil/reghtml/regs/far2afmcfars/fardfars/far/15.htm) as supplemented for definitions of cost realism and price reasonableness).

**1. Price Reasonableness.**  All source selections are conducted with the expectation of adequate price competition and rely on market forces to ensure awarded prices are reasonable. Only in extraordinary circumstances will additional information beyond proposed prices be necessary for the contracting officer to determine the price fair and reasonable.

**2. Cost Realism.** If a cost realism analysis is to be accomplished, the offeror should be advised that the Source Selection Authority will be shown both the government estimate of probable cost or price, and the offeror’s proposed cost or price during the evaluation briefing. The evaluation criteria (section M of the Request for Proposal or equivalent solicitation provision) must clearly state how the cost evaluation is to be conducted.

**3. Affordability.** When trade-offs are considered, the cost factor definition must also consider affordability. When defining affordability, some acquisitions teams have found it prudent to share budget information; however, this practice may not be suitable for all source selections.

**4. Data.** The amount of price/cost data ([FAR 15.402](http://farsite.hill.af.mil/reghtml/regs/far2afmcfars/fardfars/far/15.htm)) requested in the Request for Proposal or solicitation should be limited to only the data absolutely necessary for making the reasonableness/realism assessment ([FAR 15.403](http://farsite.hill.af.mil/reghtml/regs/far2afmcfars/fardfars/far/15.htm), as supplemented). The contracting officer, as supported by any price/cost analysis team members, is responsible for all aspects of price or cost evaluation; however, the CO bears the responsibility for determining the amount of price or cost information to be requested in the Request for Proposal.

5.5.3 (ref 2). When utilizing the MPC estimating process for ACAT I programs, cost uncertainty analysis should be conducted that allows a range (or distribution) of possible costs to be developed based on statistical techniques. This is necessary because the term “most probable” implies that other, less likely estimates exist. Cost uncertainty analysis quantifies uncertainty due to the variance in cost estimating methods, as well as uncertainty in the technical, schedule, performance and programmatic inputs. The application of the various statistical techniques inherent in uncertainty analysis will result in a mathematically correct most probable cost, a level of confidence, and the confidence levels for all other costs. Uncertainty analysis is highly recommended but not required for programs smaller than ACAT I. For additional information, reference the Air Force handbook of Cost Uncertainty and Risk Analysis. This handbook and related information is located on the FM Knowledge Now Website (<https://afkm.wpafb.af.mil/ASPs/CoP/OpenCop.asp?Filter=OO-FM-CA-01>).

5.5.4. MPC referred to in the mandatory procedures is the same thing as the probable costs referred to in the FAR. A draft program office estimate (POE) or Independent Government Estimate (IGE) with the cost estimating data and methodology should be established before the intense and extensive up-front communications with prospective offerors. The POE/IGE may be altered due to methodologies and data acquired during these discussions. The MPC developed for each offeror may use some of the estimating techniques from the POE/IGE depending on the proposed solution when compared to the assumptions for the POE/IGE. Many times the estimating techniques will be adjusted for the offeror’s unique characteristics. The Cost/Price risk evaluation is the result of comparing and contrasting each offeror’s MPC (and its associated uncertainty analysis) with each individual proposal (and its associated uncertainty analysis).

If a decision has been made to do a formal uncertainty analysis, the contractor shall provide both its proposed cost and its analysis of uncertainty as part of its proposal. In order to ensure that the Air Force and industry adequately understand the degree of cost/price risk associated with an offeror's proposal, the SSET must adequately communicate information about the rationale for the government's risk assessment of the Cost/Price Risk factor with each offeror during the discussions period after the competitive range determination but before request for Final Proposal Revision. The uncertainty analysis should be performed for ACAT I programs and the [AF Cost and Risk Uncertainty Handbook](https://km.saffm.hq.af.mil/ASPs/DocMan/DOCDisplay.asp?Filter=AF-FM-CH-04&DocID=2551103) can be used as a guide. This handbook and related information is located on the FM Knowledge Now Website (<https://km.saffm.hq.af.mil/>). Uncertainty analysis is highly recommended but not required for programs smaller than ACAT I.

5.6.1.1. The Source Selection Evaluation Team may recommend award without discussions at the Decision Briefing. In this instance a competitive range determination is not required. However, when awarding without discussions, the team should obtain approval from the SSA first, then obtain contract clearance. This is more efficient than performing contract clearance first, and subsequently having the SSA determine that discussions are necessary.

5.6.1.2 The issuance of Clarification and Communication ENs should not result in the revision of an offeror’s proposal.

5.6.2. (ref 1) Normally, when the Source Selection Authority is other than the contracting officer, a competitive range briefing is conducted. The Competitive Range Briefing may be used to document the competitive range determination for the Source Selection Authority including the Source Selection Evaluation Team’s interim evaluation of all offerors, and the Source Selection Evaluation Team’s recommended “Evaluation Notices.” The briefing is primarily used to obtain Source Selection Authority approval to enter discussions (issue Evaluation Notices), and/or eliminate offerors from the competitive range. When a competitive range briefing is required, charts should be developed in sufficient detail to support the contracting officer recommendations.

5.6.2. (ref 2) At this point in the process, there are frequently numerous issues to discuss with offerors. Therefore, it is especially important to explain clearly to the Source Selection Authority which issues are of greatest significance, particularly those for which it may be necessary to issue Evaluation Notices regarding deficiencies in the offeror's proposal.

5.6.2.1. (ref 1) Generally, past performance information is considered adverse if it supports a less-than-satisfactory rating on any evaluation element or any unfavorable comment received.

5.6.2.1. (ref 2) Reference [FAR 15.306(a)(2), (b)(1), and (d)(3)](http://farsite.hill.af.mil/reghtml/regs/far2afmcfars/fardfars/far/15.htm).

5.6.5.(ref 1) “Discussions” are required for those areas of a proposal that are considered deficient, where weaknesses exist, or where other aspects of the offeror’s proposal (such as cost, price, technical approach, past performance, and terms and conditions) are significant enough to affect the selection decision, and/or where information presented by the offeror is unclear. These areas may include issues of compliance with the requirements of the Request for Proposal other than evaluation factors.

Discussions must be sufficiently robust to ensure a complete understanding of the proposal, and may include real time face-to-face dialogue as necessary. These detailed discussions can include any aspect of a proposal that the Air Force wishes to discuss, but as a minimum, should specifically address areas of identified or suspected risk to enable the government to quantify potential cost, schedule and performance impacts. Discussions may also use negotiations and bargaining, as described in FAR 15.306(d), which includes persuasion, alteration of assumptions and positions, give-and-take, and may apply to price, schedule, technical requirements, type of contract, or other terms of a proposed contract. The discussion phase permits offerors to formulate revisions to their proposals as necessary. Especially in those areas where proposal revisions require changes to contractually-binding documentation, “slip pages of different colors” may be provided by offerors to ensure incorporation of contractually -binding language prior to considering the issue resolved. The contracting officer also is encouraged to discuss other aspects of the offeror's proposal that could, in the opinion of the contracting officer, be altered or explained to enhance materially the proposal's potential for award. However, the contracting officer is not required to discuss every area where the proposal could be improved. The scope and extent of discussions are a matter of contracting officer judgment.

“Discussions” may be conducted either orally or in writing or both, determined by the nature of the issues to be addressed. The team determines what issues need to be addressed. However, keep in mind that the scope and extent of “discussions” are a matter of contracting officer judgment ([FAR 15.306(d)(3))](http://farsite.hill.af.mil/reghtml/regs/far2afmcfars/fardfars/far/15.htm). For complex systems, complex services, solicitations where oral presentations are included, or other source selections where it is deemed valuable, the source selection teams should consider whether it is appropriate to award without discussions. If it does not make sense to try and award without discussions, the team can state in their source selection plan and RFP that they intend to enter discussions immediately upon receipt of proposals. This will eliminate the possibility of award without discussions, but will allow the SSET flexibility to ask questions immediately and gain information necessary to complete initial evaluations and possibly shorten source selection time periods. Successive competitive range determinations can be made after the conclusion of initial evaluations if necessary. The choice to open discussions immediately should not be restricted to source selections that employ oral presentations. In some cases it makes sense to open discussions immediately because there will be no possibility of award without discussions.

Before concluding discussions, teams should consider the release of a “pre-FPR” to include the ratings, the model contracts, and a specific delineation of any outstanding issues. This provides offerors the opportunity to resolve any potential issues prior to release of the FPR, and would logically reduce the likelihood of a substantial post-FPR discussions.

5.6.5. (ref 2) Teams may use the actual briefing charts that were used to brief the SSA as a method to provide the offeror the results of their ratings at the initiation of discussions and prior to final proposal revision request.

5.6.5.2. Oral “discussions” are a useful “discussion” method, but must be documented in writing for the official record. Notice of adverse past performance should be provided in writing through the issuance of an evaluation notice. When utilizing written “discussions,” the Evaluation Notice form or similar form is normally used. Whatever method is chosen, “discussions” should be accomplished using the most efficient, economical, and timely means.

5.6.6. (ref 1) The request for final proposal revisions should highlight any remaining deficiencies in the offeror’s proposal. No further negotiation occurs prior to the Source Selection Authority decision and award to the successful offeror(s) is made. In the event further “discussions” are required after receipt of the final proposal revisions, with Source Selection Authority concurrence the contracting officer may reopen “discussions”; however, great care must be exercised to avoid providing an unfair advantage to any offeror. ([FAR 15.307](http://farsite.hill.af.mil/reghtml/regs/far2afmcfars/fardfars/far/15.htm))

5.6.6. (ref 2) The team should jointly evaluate the final proposals using the Rating Team Worksheets, or other similar document. Only one worksheet is completed for each offeror (unless the team is evaluating subfactors; in this case, the team should use one sheet for each subfactor per offeror). The “final” evaluation block of the worksheet should be checked.

**6. Decision Activities**

6.1. The Decision Briefing is held after the initial proposal evaluations are complete, if the award will be made without discussions, or after completion of final proposal evaluations, when discussions were conducted.

6.2.1. In using the best value approach, the government seeks to award to an offeror who gives the government the greatest confidence that it will best meet our requirements affordably. This may result in an award being made to a higher-rated, higher-priced offeror where the decision is consistent with the evaluation factors and the Source Selection Authority reasonably determines that the technical or service superiority and/or overall business approach and/or lower risk and/or superior past performance of the higher priced offeror outweighs the cost difference. The Source Selection Authority, using sound business judgment, bases the source selection decision on an integrated assessment of the evaluation factors and subfactors.

6.2.3. Typically, the Source Selection Evaluation Team Chairperson, Contracting Officer, and other members of the source selection team draft the Source Selection Decision Document. Paragraph 7.12 describes the Source Selection Decision Document.

6.5.1. Only one consensus recommendation will be presented to the SSA. This recommendation, which must be based on the evaluation criteria contained in section M of the RFP, will be presented to the SSA by the SSAC. If an SSAC is not used, then it will be presented to the SSA by the SSET Chairperson. In either event, if a significant disagreement exists, any team member will be afforded the opportunity to present a minority opinion to the SSA.

6.6. Reference the “Community Advice” section of the [AFFARS Library, Part 5315](https://cs.eis.af.mil/airforcecontracting/knowledge_center/Pages/5315-main.aspx) for advice on debriefings and associated documentation.

7. Source selection documentation should be kept to a minimum and not unnecessarily duplicate information contained in other documents pertaining to the acquisition. In those instances where information is contained in another acquisition document, the source selection document should simply refer to the original document and a copy attached, excepted as noted within a specific document, e.g. the Source Selection Decision Document. The source selection documentation should fully represent the source selection activity associated with this acquisition. For clarity, required and optional Source Selection documentation is listed in this section. Generally, each document is listed in the order of the timing for approval (if required) and other information pertinent to documentation is described.

7.1. MAJCOM and other community advice guidance on the preparation of Source Selection Plans is available in the [AFFARS Library, Part 5315](https://cs.eis.af.mil/airforcecontracting/knowledge_center/Pages/5315-main.aspx).

7.5. Evaluation documentation must be demonstrably consistent with the RFP. Documentation must reflect consensus discussions and the reasoned judgment of the evaluation. If all team members are unable to reach a consensus, the SSET Chair, after considering each individual assessment, must determine which assessment accurately reflects the proposal as it relates to the solicitation. Backup documentation should clearly explain rationale for the position adopted as well as the position that was not adopted and the rationale for rejecting that position. SSET Chair must identify minority reports to the SSA.

Use of [electronic source selection tools](https://cs.eis.af.mil/airforcecontracting/knowledge_center/Documents/AFFARS_Library/5315/source-selection-tools.ppt) is helpful, especially in larger efforts. If worksheets are used, they typically include:

Subfactor Worksheets -- the evaluator's name, the offeror's name, the particular factor or subfactor being evaluated, a brief description of what is being offered, and a discussion of whether the proposal exceeds, meets, or fails to meet performance or capability requirements. The same worksheet may include a discussion of mitigation efforts or weaknesses related to proposal risk. Here is a link to a sample rating team worksheet.

Subfactor Summaries -- after all subfactor evaluators have completed their evaluation, the subfactor captain should complete a subfactor summary which includes the offeror's name, a brief proposal description, and the results of the evaluation in terms of color rating assigned, with supporting rationale (strengths, deficiencies). The same form may also include the risk rating, with supporting rationale (mitigation efforts, weaknesses). Here is a link to a sample subfactor summary.

Past Performance Evaluation. The members of the Performance Confidence Assessment Group must document the results of their assessment by listing all contracts that were relied upon, with the positive and negative aspects associated with performance under each. A description of the relevancy of the contracts should also be included.

7.6. Briefings are the primary means of providing key information to the Source Selection Authority. At the outset of any briefing session, the roles and government/non-government status of all individuals must be made known to the Source Selection Authority. The Source Selection Evaluation Team chair is usually responsible for managing the scheduling, content, and presentation of the briefings. The Source Selection Evaluation Team chair should plan for, and integrate, local staff advisory participation with that of the evaluation team during the formulation of any briefing. When a Source Selection Advisory Council is used, the Source Selection Advisory Council chair will manage Source Selection Advisory Council contribution to any briefing. Source Selection Advisory Council input will be a discrete supplement to the information presented by the Source Selection Evaluation Team, rather than a refinement or revision of any Source Selection Evaluation Team briefing. Attendance should be controlled and limited to the minimum number of essential individuals authorized by the Source Selection Evaluation Team chair, Source Selection Advisory Council chair (when applicable), or the Source Selection Authority. Examples of those who would normally attend are: Source Selection Authority, Source Selection Advisory Council (where used), Source Selection Evaluation Team, presenters, specified legal staff, contracting policy and source selection advisors, or any other individuals requested by the chairs for their specialized expertise.

The briefing may be in the form of charts, memoranda, papers, or any other format and may be presented as specified by the Source Selection Authority.

7.7. A sample form for Evaluation Notices is provided.

7.9. The briefing normally contains matrices displaying color ratings for mission capability technical rating subfactors and a mission capability risk rating for each subfactor, past performance evaluation, Cost/Price Risk (if required) and cost/price analysis for all offerors, according to definitions contained in paragraph 5.5. The briefing also contains supporting narrative in bullet form characterizing all strengths, deficiencies, weaknesses, and confidence information to be considered by the Source Selection Authority regarding the comparison of offerors’ proposals and past performance. Strengths, deficiencies and weaknesses which contributed to the color ratings, and risk ratings are expected to include an indication of the potential benefit to, or undesirable impact upon, the government. Also include those positive and negative aspects which affect the performance confidence assessment, if assigned. Finally, address the proposed cost or price and any realism assessment. As a minimum, the following information should also be briefed:

-- Recap of distinguishing aspects of this acquisition

-- Funding issues

-- Contractual considerations

-- Exceptions to Terms and Conditions

-- Recap of factors and relative importance

-- Evaluation criteria for each factor/subfactor

-- Summary of offerors’ proposed approaches

-- Source Selection Evaluation Team’s comments for trade off analysis for the Source Selection Authority’s consideration in making an integrated assessment of best value in accordance with the solicitation’s evaluation criteria

-- Any analyses by the Source Selection Advisory Council

-- The source selection recommendation of the SSET or SSAC, if used, and any minority opinion.

7.10. (ref 1) Ensure the Proposal Analysis Report is consistent with the Decision Briefing. The Source Selection Authority may require that the Source Selection Advisory Council review the Proposal Analysis Report. If the PAR is combined with the PCM/PNM, the price/cost analyst then becomes a key player in writing and reviewing the PAR. The Contracting Officer must sign the document since it will include the determinations of price reasonableness and adequate price competition.

7.10. (ref 2) Typical organization and content of a Proposal Analysis Report follows (refer to [IG5315.305](http://farsite.hill.af.mil/reghtml/regs/far2afmcfars/af_afmc/affars/IG5315.305.docx) for more detailed advice on preparing a Proposal Analysis Report):

**Part I Introduction** – Evaluation Factors, Discussion of Requirements, and Identification of Offerors. This section should include: (a) Evaluation factors; (b) Discussion of the requirements in the solicitation; and, (c) Identification of the offerors who responded and those included in the competitive range.

**Part II Description of Proposals** – Summaries. This section should contain a brief summary description of any significant, unique attributes of the proposal submitted by each offeror within the competitive range. No judgments or comparisons as to the quality, rating, or ranking of proposals should appear in this section.

**Part III Evaluation Results --** This section should contain the results of the evaluation of each offeror's proposal based on the comparison to the evaluation factors contained in the solicitation, i.e., cost/price risk (if used), past performance , mission capability, and price or cost.

**Part IV Comparative Analysis of Offers** -- This section should include a comparative analysis of all offers received that were included in the competitive range. If offerors were excluded from the competitive range, the rationale for exclusion should be documented here. The analysis identifies proposal strengths, deficiencies, and weaknesses as well as the resulting evaluation ratings. A discussion should also be included of the results of the past performance evaluation, along with a discussion of the price/cost evaluation. When completed, this section should contain the overall assessment including any inter-factor analysis of cost/price risk (if used), price or cost, past performance , and mission capability, and shall document the rationale for the source selection recommendation of the SSET or SSAC, if used, and any minority opinion.

7.11. Typical organization and content of a Simplified Source Selection Report follow:

**Section I** **SSP and Acquisition Description –** For acquisitions whenever the contracting officer is not the Source Selection Authority, attach the Source Selection Plan. For acquisitions using a streamlined Source Selection Plan, provide the information required in paragraph 7.11. For clarity, process refers to items such as Lowest Price Technically Acceptable or Performance Price Tradeoff, while techniques refer to items such as oral presentations, first article demonstrations, and so forth.

**Section II** **Evaluation** -- Section II details the evaluation by offeror and should be used for debriefings. This normally consists of the Rating Team Worksheets (both initial and final) and the Price Competition Memorandum. The Contracting Officer and the lead technical evaluator, if applicable, sign the Worksheets.

**Section III** **Comparative Analysis** -- Section III is a concise comparative analysis of offerors that supports the source selection decision. When the SSA is other than the Contracting Officer, include the evaluation team’s source selection recommendation and rational of the SSET or SSAC, if used, and any minority opinion. This section will also include supporting rationale for offeror(s) excluded from the competitive range. The Contracting Officer and the lead technical evaluator, if applicable, sign the Comparative Analysis.

**Section IV** **Source Selection Decision Document --** Section IV includes the Source Selection Decision Document. The Source Selection Decision Document must be signed by the Source Selection Authority. The debriefing documentation may be attached to this section.

Note: Some individuals include a tab in the source selection file labeled “Simplified Source Selection Report” under which a form is placed that indicates under which tabs the various parts of the Simplified Source Selection Report may be found. This is wholly in line with the philosophy that this report is to be streamlined and use existing documentation wherever possible.

7.12. The Source Selection Decision Document is required and is the single document that provides insight into the Source Selection Authority’s integrated assessment and resultant decision. It is important that this document be written clearly and in a manner that allows it to stand on its own without need of referencing other documents. Paragraphs should be written in a concise manner and should flow logically. Ensure that the source selection decision is consistent with the evaluation factors and that each conclusion or decision in the Source Selection Decision Document is directly linked to those evaluation factors. In addition, the Source Selection Decision Document must compare aspects of the most competitive offers against each other; e.g., “I have decided Contractor A’s approach to factor XX was better than [Contractor B’s][all other offerors’] because Contractor A proposed, discussed, resolved, identified, possesses, or whatever.” All pertinent information including necessary proprietary information must be included in the Source Selection Decision Document. The Source Selection Decision Document must be fully traceable to the evaluation criteria (Section M or equivalent provision of the solicitation), the evaluation briefing charts, and the PAR.

7.12.1. The Source Selection Decision Document should contain source selection sensitive information only to the extent it is pertinent to the decision. Usually, the decision comes down to a serious debate between the relative merit of two or three offers, and the Source Selection Decision Document should reflect this debate.

8.1 Discussion ENs are normally prepared for all deficiencies, uncertainties, and weaknesses discovered during the evaluation.

8.16. Proposals including an uncertainty about meeting a material performance or capability requirement will normally be rated “yellow.” Proposals including an uncertainty about potentially exceeding a material performance or capability requirement will normally be rated “green.”

Unlike being non-responsive in the case of an IFB, in negotiated procurements, teams should address any shortfalls, questions, or uncertainties during discussions and provide the offeror the opportunity to satisfy the government’s requirement. It is only in cases where an award without discussions shall occur that an offeror may not have the opportunity to address such issues in order to clearly meet the government requirement. In these cases, the teams should carefully weigh the benefit of awarding without discussions over what otherwise might be another competitive proposal if discussions were to be held and proposal revisions accepted.