

DAU

Source Selection Procedures

Presenters:

Bill Long, DAU

Tom Elsesser, DAU

Mike Pelkey, OUSD(A&S) DPC

George Winborne, OUSD IP Cadre



DoD Source Selection Procedures (SSP) Update

What we will be covering:

- Highlight major changes to the SSP
- Touch on points of emphasis in the source selection process
- Take questions from the audience

DoD Source Selection Procedures (SSP) Update

- DoD Source Selection Procedures (SSP) issued 20 Aug 22
 - Rescinds 01Apr 2016 DoD Source Selection Procedures
 - Applies to all solicitations issued on or after 1 Sep 22
- Procedures are:
 - Applicable to:
 - All Major System Acquisition Program Source Selections
 - Competitive FAR part 15 acquisitions estimated over \$10M
- Beneficial SSP processes/procedures may be used on:
 - Any FAR-based acquisitions estimated at less than \$10M where FAR subpart 15.3 Source Selections
 - Other competitions, such as Fair Opportunity Proposal Request (FOPR) orders, although not required

List of Major Updates

- Addition of Appendices:
 - Appendix D Streamlining Source Selection and
 - Appendix E Intellectual Property
- Updated References to SAM.gov
- Updated Table Definitions:
 - Table 2A
 - Table 2B
 - Table 3
- Updates to Statutory and Regulatory References

DoD Source Selection Procedures (SSP) Update

Appendix D Streamlining Source Selection

- D.1 – D.3 Collects Lessons Learned, Best Practices, Benchmark Approaches in a single area
 - D.1 General Streamlining Tactics
 - D.2 Preparation for Proposal Evaluation and Source Selection
 - D.3 Source Selection Management Plan

DoD Source Selection Procedures (SSP) Update

Appendix D Streamlining Source Selection

- D.4 – D.8 Collects Additional Source Selection Approaches
 - D.4 Tiered or Gated Approaches
 - D.5 Oral Presentations
 - D.6 Demonstrations in Source Selections
 - D.7 Highest Technically Rated Offeror (HTRO) Approach
 - D.8 Performance Price Tradeoff

DoD Source Selection Procedures (SSP) Update

Appendix D Streamlining Source Selection

- D.9 Collects Useful Websites in a single area

Source Selection Training Resources

- DAU Mission Support Capabilities and Training (*in Appendix D*)
 - [Mission Assistance Program](#)
 - [CON 0072 Source Selection](#)
 - [WSC 032 Source Selection Simulation \(SSS\) Workshop](#)
 - [WSC 005 Source Selection](#)
 - [CON 1300V Contract Award](#)
 - [SBP 201 Intermediate Small Business Programs, Part A](#)
 - [CLC 028 Past Performance Information](#)

DPC Source Selection Links

- Competitive Source Selection Procedures, Best Practices, and more (<https://www.acq.osd.mil/asda/dpc/cp/policy/competitive-source-selection.html>)

Source Selection Tutorial Videos

- [Source Selection Plan](#)
- [Value Added Technical Evaluated Price \(VATEP\)](#)
- [AFICA DAU Testimonial: Source Selection Simulation \(SSS\)](#)
- [Protests 5 Part Series](#)
- Virtual Contracting Enterprise Source Selection Videos
 - [Independent Government Cost Estimate](#)
 - [Selecting Evaluation Factors](#)
 - [Source Selection](#)
 - [Past Performance](#)
 - [Cost Realism](#)
 - [Exchanges](#)
 - [Competitive Range](#)
 - [Debriefings – 2](#)
 - [Source Selection Decision](#)
 - [Protests](#)

Definitions - Major Changes

- **Highest Technically-Rated Offeror (HTRO)** --- A selection methodology allowing award to the highest technically rated offer also found to have a reasonable price without using trade-offs between cost or price and technical
- **Quality** --- The composite of material attributes including performance features and characteristics of a production or service to satisfy a customer's given need
- **Significant Strength** --- ...An aspect of an Offeror's proposal with appreciable merit or will exceed specified performance or capability requirements to the considerable advantage of the Government during contract performance”

DoD Source Selection Procedures (SSP) Update

- Adjectival Rating Tables – Major Changes
 - Added “Significant Strength”
- Statutory/Regulatory References Updated
- Replaced “FOUO” with “Controlled Unclassified Information” (CUI)
- Replaced “FBO” with “SAM.gov”

Table 2A. Technical Rating Method

Color Rating	Adjectival Rating	Description
Blue	Outstanding	Proposal demonstrates an exceptional approach and understanding of the requirements, contains multiple strengths and/or at least one significant strength.
Purple	Good	Proposal demonstrates a thorough approach and understanding of the requirements and contains at least one strength or significant strength.
Green	Acceptable	Proposal demonstrates an adequate approach and understanding of the requirements.
Yellow	Marginal	Proposal has not demonstrated an adequate approach and understanding of the requirements.
Red	Unacceptable	Proposal does not meet requirements of the solicitation and, thus, contains one or more deficiencies and is un-awardable.

Table 2B. Technical Risk Rating Method

Adjectival Rating	Description
Low	Proposal may contain weakness/weaknesses which have low potential to cause disruption of schedule, increased cost, or degradation of performance. Normal contractor emphasis and normal Government monitoring will likely be able to overcome any difficulties.
Moderate	Proposal contains a significant weakness or combination of weaknesses which may have a moderate potential to cause disruption of schedule, increased cost, or degradation of performance. Special contractor emphasis and close Government monitoring will likely be able to overcome any difficulties.
High	Proposal contains a significant weakness or combination of weaknesses which is likely to have high potential to cause significant disruption of schedule, increased cost, or degradation of performance. Special contractor emphasis and close Government monitoring will unlikely be able to overcome any difficulties.
Unacceptable	Proposal contains a deficiency or a combination of significant weaknesses that causes an unacceptable level of risk of unsuccessful performance.

Table 3. Combined Technical/Risk Rating Method

Color Rating	Adjectival Rating	Description
Blue	Outstanding	Proposal demonstrates an exceptional approach and understanding of the requirements and contains multiple strengths and/or at least one significant strength , and risk of unsuccessful performance is low.
Purple	Good	Proposal indicates a thorough approach and understanding of the requirements and contains at least one strength or significant strength , and risk of unsuccessful performance is low to moderate.
Green	Acceptable	Proposal meets requirements and indicates an adequate approach and understanding of the requirements, and risk of unsuccessful performance is no worse than moderate.
Yellow	Marginal	Proposal has not demonstrated an adequate approach and understanding of the requirements, and/or risk of unsuccessful performance is high.
Red	Unacceptable	Proposal does not meet requirements of the solicitation and, thus, contains one or more deficiencies and is unawardable, and/or risk of performance is unacceptably high.

DoD Source Selection Procedures (SSP) Update

Appendix E Intellectual Property

- By Its Nature, Intellectual Property Is Specific to the Particular Acquisition
- The Appendix Serves to Remind the Source Selection Planning Team to Give Thought Up Front to the Data Requirements and Intellectual Property Needs of the Particular Acquisition
- Refer to the Adaptive Acquisition Framework Guidance *Intellectual Property: A Strategic and Tactical Guidebook* for more information on evaluating IP (*anticipated release date in late 2022*)

Important Considerations for ALL Source Selections

- Contemporaneous Documentation
 - Documentation should be prepared with an understanding that it may someday be read by a third party (Courts, GAO, etc.)
 - Important to include enough detail so that the document stands on its own and does not require a verbal explanation
 - Getting proposal change pages concurrent with responses to Evaluation Notices is a best practice...This reduces chance that Final Proposal Revision will fall short of expectations/agreements
- Section M – Evaluation Criteria
 - Keep Evaluation Criteria to minimal number of key discriminators among proposals
 - Everyone will want their “pet rock” among the criteria. Including them will lengthen proposals and time to evaluate, without benefit to the source selection decision
 - Have a plan, ensure the plan is good, follow the plan and document the plan!
 - Do **NOT** deviate! (Evaluate what you said you were going to evaluate)

Table 4. Past Performance Relevancy Rating Method

Adjectival Rating	Description
Very Relevant	Present/past performance effort involved essentially the same scope and magnitude of effort and complexities this solicitation requires.
Relevant	Present/past performance effort involved similar scope and magnitude of effort and complexities this solicitation requires.
Somewhat Relevant	Present/past performance effort involved some of the scope and magnitude of effort and complexities this solicitation requires.
Not Relevant	Present/past performance effort involved little or none of the scope and magnitude of effort and complexities this solicitation requires.

Table 5. Performance Confidence Assessments Rating Method

Adjectival Rating	Description
Substantial Confidence	Based on the offeror’s recent/relevant performance record, the Government has a high expectation that the offeror will successfully perform the required effort.
Satisfactory Confidence	Based on the offeror’s recent/relevant performance record, the Government has a reasonable expectation that the offeror will successfully perform the required effort.
Neutral Confidence	No recent/relevant performance record is available or the offeror’s performance record is so sparse that no meaningful confidence assessment rating can be reasonably assigned. The offeror may not be evaluated favorably or unfavorably on the factor of past performance.
Limited Confidence	Based on the offeror’s recent/relevant performance record, the Government has a low expectation that the offeror will successfully perform the required effort.
No Confidence	Based on the offeror’s recent/relevant performance record, the Government has no expectation that the offeror will be able to successfully perform the required effort.

Table 6. Small Business Rating Method

Color Rating	Adjectival Rating	Description
Blue	Outstanding	Proposal indicates an exceptional approach and understanding of the small business objectives.
Purple	Good	Proposal indicates a thorough approach and understanding of the small business objectives.
Green	Acceptable	Proposal indicates an adequate approach and understanding of small business objectives.
Yellow	Marginal	Proposal has not demonstrated an adequate approach and understanding of the small business objectives.
Red	Unacceptable	Proposal does not meet small business objectives.