DEFENSE INFORMATION SYSTEMS AGENCY
The IT Combat Support Agency

Proposal Evaluations

Once you hit "Send", what happens next?

DISA | Office of Small Business Programs

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How Does DISA Decide Where to Compete an Acquisition?

- **Acquisition Strategy decisions are <u>always</u> driven by market research**
- **Agency must first address the "Rule of Two" before identifying where to compete a requirement**
  - Market research must address if two or more small businesses anywhere are capable of meeting the requirements
  - If two or more are capable of meeting the requirements and at least two are contract holders under an existing multiple-award contract or the GSA MAS, then the requirement may be solicited under the existing vehicle
- **IAW the Competition in Contracting Act (CICA), it is the Contracting Officer's duty to promote competition to the maximum extent practicable**
- **IAW FAR 19.201(a), "It is the policy of the Government to provide maximum practicable opportunities in its acquisitions to small business, veteran-owned small business, service-disabled veteran-owned small business, HUBZone small business, small disadvantaged business, and women-owned small business concerns."**

If you believe that an acquisition is a suitable candidate for a small business set-aside, it's imperative that you demonstrate your capabilities via response to Sources Sought Announcements.

Considerations for Competition

Value is Everywhere, but where can we get the most?

The Government has asked us what we think, what do they do next?

- It is no secret that the Government is always looking for the best value; for the taxpayers, for the warfighters, and for all stakeholders (including yourselves).
- While evaluation strategies differ for every requirement, the end-goal is always to get the best value for the interested parties above.
- Your feedback on Sources Sought Notices or Draft RFPs are tantamount to our acquisition planning activities.
- During our market research phases, we are looking for a wide variety of aspects that help to mold our future acquisition strategies.
- With every requirement, there are variables that determine a particular acquisition decision; to include:

Tolliver Case Considerations

Acquisition History

Scope/Ceiling of Vehicles

PoP of Vehicle

~ # of Responses

Quality of Responses

How Do I Know What's Evaluated?

Read and understand the evaluation criteria before you start crafting your proposal

- **Evaluation criteria is identified in the solicitation, RFP or RFQ**
  - Part 8.4 – Federal Supply Schedules: Body of RFQ letter
  - Part 15 – Formal Source Selections IAW FAR Part 15 Procedures: Section M
  - Part 16.505 – Fair Opportunity Procedures: Body of RFP letter

- **Evaluation criteria and basis for award vary widely based on the nature of the acquisition**
  - Lowest-priced Technically Acceptable (LPTA): Award to lowest-priced offeror with acceptable approach
  - Price-Performance Tradeoff (PPTO): Evaluated in order of price (lowest to highest); technically acceptable offerors are evaluated for Past Performance and assessed a Performance Confidence rating. Contracting Officer may tradeoff price in favor of a proposal/quotation with a superior past performance rating
  - Best Value Tradeoff (BVTO): Non-cost/price factors, when combined, are more important or approximately equal to the Cost/Price Factor allowing the Contracting Officer to tradeoff price in favor of a technically superior solution
  - Phased (or Gated) Evaluation: Combination of LPTA "gate" criteria in Phase 1 of evaluations and those offerors who are acceptable in Phase 1 proceed to Phase 2 – BVTO portion of the evaluation

Typical Evaluation Process Flow Chart (at a high level)

1

Compliance Reviews: Proposal or quotation timely, complete and IAW administrative requirements

Responsibility: Contractor not an excluded party, certs & reps in SAM.gov, FAPIIS

Socio-economic Status: Contractor is a small business (or specific socio-economic category) for designated NAICS code at time of proposal submission (for set-asides only)

2

Initial Evaluations: Individual evaluators review all proposals and complete evaluations independently based on comparison of proposal to evaluation criteria only. Must document if contractor met/exceeded/did not meet requirements including all strengths, weaknesses, significant weaknesses, deficiencies and uncertainties.

Initial Consensus: Evaluation teams come to consensus on the initial ratings and narratives for all offerors based on comparison to evaluation criteria only

3

Internal Reviews Completed: Dependent on dollar value of the acquisition, reviews may be required by Legal, Policy Compliance, One-level above the Contracting Officer and the Source Selection Authority / Contract Decision Authority (if not the Contracting Officer)

Evaluation Notices (EN) Generated: Weaknesses, significant weaknesses, deficiencies and uncertainties identified in initial evaluations become ENs

4

Competitive Range: Contracting Officer prepares a Competitive Range Determination documenting which contractors should remain in competition and included in discussions

Discussions: ENs are issued to the contractors remaining in the Competitive Range

Receipt of EN Responses: Contractors prepare/submit EN responses

5

Interim Evaluations: EN responses evaluated by individual evaluators followed by team consensus to determine if EN is resolved or unresolved; ratings and narratives updated accordingly in consensus documents

Request for Final Proposal Revisions (FPR): Contracting Officer issues request for FPRs to contractors in Competitive Range

Receipt of FPRs: Contractors prepare/submit FPRs.

6

Final Evaluations: FPRs evaluated by individual team members based on comparison of proposal to evaluation criteria only

Final Consensus: Evaluation teams come to consensus on the final ratings and narratives for all offerors based on comparison to evaluation criteria only

Tradeoff Decision: Source Selection Authority conducts tradeoff analysis of proposals to determine the best value to the Government, all factors considered

7

Award Documentation: Contracting Officer/Specialist prepare all award documentation and prepare file for pre-award reviews

Final Reviews: Reviews by Legal, Policy Compliance, One-level above the Contracting Officer and the Source Selection Authority / Contract Decision Authority (if not the Contracting Officer)

Award: Contracting Officer executes award and notifies successful and unsuccessful offerors

Why Do Evaluations Take So Long?

- **Evaluation criteria too broad – should focus on high-risk discriminators**
- **Each element (sentence, bullet, etc.) of the stated evaluation criteria must be addressed in the evaluator's narratives**
- **BVTO evaluations take on average 5 days per proposal received to complete initial evaluations**
- **Evaluation of 1st proposal always takes longer than average as evaluators synergize**
- **Varying proposal formats and styles**
- **PALTs are based on the assumptions that:**
  - No greater than 5 proposals are received
  - Only 1 round of discussions will be necessary
- **Internal reviews are conducted throughout the evaluation phase (initial, interim and final) to ensure consistency, legal sufficiency and compliance**
- **DITCO's lead time for a service acquisition greater than $10M under a GWAC/MAC is ~210 calendar days**

What the Evaluators Look For...

Remember – the PM just wants to solve a problem; 'who' solves that problem for us is the SSA's decision based upon the stated evaluation criteria and relative order of importance.

- **Government source selection team members live and breathe strengths, weaknesses, significant weaknesses, and deficiencies. The definition of each is second nature to evaluators. The evaluators all bring a unique set of skill-sets to evaluations, so remember:**

- Write proposals like you do not know the skillset of the person reading them
- Ensure proposals are clear, concise, and well-thought-through
- Highlight the points that you believe serve as discriminators (those things that make you unique) and tie them to the evaluation criteria
- Proofread proposals – lack of attention to detail in proposals insinuate of a lack of quality control
- Have your best technical folks provide the core content, but let the technical writers finalize the proposal
- A technical proposal written by engineers looks good to other engineers but can be overlooked by other SME evaluators looking for value propositions

Let Your Strengths Be Captured

Showcase Value

A Solicitation comes out that is in your 'wheel-house', now how can you stand out?

- The Government is looking for Discriminators. How are you different than the others?
- Are those claimed discriminators able to be backed up by your past performance, ratings, and recommendations?
- We're looking for Qualitative and Quantitative Words; not emotional words & phrases.
- Technical evaluators love to see what you've done, but how can that be applied to future applications?
- What you've done is great, but how can you apply that to what we need, is what we want to hear…
- More than anything, we're looking for value…

It's your job to articulate that what you can do is a value-add to the warfighter, not for us to find it or make presumptions?

Purpose of Evaluation Notices (EN)

- **IAW FAR 15.306(d)(3), "At a minimum, the contracting officer must…indicate to, or discuss with, each offeror still being considered for award, deficiencies, significant weaknesses, and adverse past performance information to which the offeror has not yet had an opportunity to respond. 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."**

- **Contracting Officer must identify the items identified above in discussions; independent business judgment of the offeror to determine how to respond to the ENs based upon their unique solution**
  - Government does not dictate the approach under performance-based contracting
  - ENs may not require any changes to an offeror's approach; could be a matter of providing more fidelity into the approach and how it would be implemented to meet the specified requirements
    - Do not say you <u>can</u> do it or you <u>have</u> done it before; explain <u>how</u> you would implement your solution for the instant requirement

ENs are <u>not</u> designed to steer offerors towards a "desired solution" or "normalize" approaches.

Purpose of Cost Realism

IAW FAR 15.404-1(d)(1), "Cost realism analysis is the process of independently reviewing and evaluating specific elements of each offeror's proposed cost estimate to determine whether the estimated proposed cost elements are realistic for the work to be performed; reflect a clear understanding of the requirements; and are consistent with the unique methods of performance and materials described in the offeror's technical proposal."

- Cost realism is not a mechanical comparison of offeror's proposals to the Government's IGCE; intent is not to have offeror's cost/price align to the IGCE
- Determines if the offeror's labor categories, skill mix and number of hours are realistic to perform the requirements based on the offeror's unique technical approach
- Required for cost reimbursable contract types
- Cost realism adjustments factor into the total evaluated cost/price (i.e., probable cost) which is used as the basis for tradeoff decisions

Ensure that innovation or efficiencies of your technical approach are clearly explained – show the Government how you are able to do more with less resources.

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Meeting with the PMO

How to make the most of your engagement.

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Are You Ready to Meet with a PMO?

There are two perspectives we hear most at exchanges with industry partners:

- **Use Case #1:** *You believe your company has something really great that the Government must have…*
- **Use Case #2:** *You met with a Senior Leader at DISA and they seemed interested by your product/solution…*

In both use cases, we want to know more about the **Problem** you're trying to solve, than the **Product/Service** you have that can solve it.

Remember… when *we* (the requirement owners) want to solicit a potential contract, we *must* take a technology-agnostic approach in doing so.

That means that even though you might have the best solution at the end of the day, it is our responsibility -- as stalwarts of taxpayer dollars -- to ensure that we explore the full gambit of potential approaches to solve any given capability gap.

So What Do PMs Want to Hear?

TIP: Speak to <u>the problem</u> you're solving, not <u>how</u> you want to solve it…

- Alright, so now you have the PMs attention… Here's what you need to know now:

PMs are PMs because we like to be in the 'weeds' – slick-sheets and sales pamphlets are for business development folks – save them for high-level meetings.

→ PMs want to know how you can solve their most pressing problems. Go at least two levels below the buzzwords.

→ And is the way that you intend to solve them able to be integrated into ***their*** operational environment?

→ *Remember:* your lab environment, your other clients, and even your other Government clients, are not operating under the same constraints as DISA. Do more listening than talking in this instance…

→ You have their ear at this point, but that does not mean they want you to do all the talking.

Focus More on Capturing Our <u>Attention</u> than Capturing the Requirement.

Things to Remember for your Meeting with the PMO

Try to…

TIP: – Try and think from Our perspective. How is what I'm saying being perceived?

- **With that tip in mind, for your 1st Meeting with a PMO – Try to:**

1. Make it an active engagement instead of a briefing.
2. Ask questions about their problem-sets.
3. Ask their ideas of solving their capability gaps as well – they are SMEs too in this field -- so you may learn something.
4. Remember, just because you may have the latest and greatest technology, does not mean that there might not be additional nuances worth considering when developing a next-generation solution. *You may be **part** of a grander solution…*
5. *Innovation is Iterative* in nature – your widget might be the latest and greatest – but help us plan for the long-term future state.

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Contracting Opportunities

Where can I find DISA's opportunities?

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Where Can I Find More Information on Contracting Opportunities?

- **DISA's Semi-Annual Forecast of Contracting Opportunities:** Located within the DISA Forecast to Industry home page at https://www.disa.mil/en/NewsandEvents/Events/Forecast-to-Industry-2021; provides an overview of contracting opportunities with a lifecycle value of $5M or higher over the next 3-year period

- **DISA's Annual Forecast to Industry:** Conducted once annually; DISA Executives provide overviews of high value and/or high visibility acquisitions forthcoming from their portfolios (link above)

- **Monthly Acquisition Strategy Decision Notifications (*coming in calendar year 2022*):** DISA/OSBP led initiative to post acquisition strategy decisions publicly once the DD Form 2579 has been approved; will be posted to www.disa.mil

- **System for Award Management (SAM) Contracting Opportunities:** The Government-wide point-of-entry for contracting opportunities; located at https://sam.gov/content/opportunities

- **General Services Administration's (GSA) eBuy:** Posting location for RFQs for requirements competed under the GSA MAS; located at https://www.ebuy.gsa.gov/ebuy/

- **Request for Proposal Portal for ENCORE III & SETI (must be a contract awardee and possess a CAC):** Posting location for all RFPs for requirements competed under DISA's ENCORE III or SETI premier contracts; located at https://www.ditco.disa.mil/vendors/login.asp

- **DISA's Office of Small Business Programs:** Hit a roadblock? Small businesses are always welcome to send inquiries to DISASmallBusiness@mail.mil

Closing Slide

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