

# 14 FAH-2 H-360

## TECHNICAL EVALUATION CRITERIA AND PLAN

*(CT:COR-7; 06-24-2011)*  
*(Office of Origin: A/OPE)*

### 14 FAH-2 H-361 PURPOSE OF TECHNICAL EVALUATION

*(CT:COR-4; 06-10-2011)*

- a. Federal acquisition statutes and regulations require that both negotiated and sealed bid contracts be competitively awarded to the maximum extent practicable, with the objective of obtaining the contracts most advantageous to the U.S. Government.
- b. The Department recognizes two principal methods of selecting proposals for award under negotiated acquisitions: The tradeoff process and the lowest-price technically acceptable (LPTA) process:
  - (1) The **tradeoff process** provides for the evaluation of technical and other factors in addition to cost or price to determine the proposal that represents the best overall value to the U.S. Government. The U.S. Government may make award to other than the lowest-priced proposal; however, as offers become technically equivalent, cost or price may become the determining selection factor. This method is best suited to acquisitions where the U.S. Government has determined that the superiority of the offerors' technical ability or quality to be equal to or more important than the proposed cost or price (e.g., developmental efforts, evaluations, specialized technical assistance); and
  - (2) The **LPTA process** provides for award to the lowest-priced proposal that meets a set of minimum standards of technical acceptability specified in the Request for Proposals (RFP). This method should be used whenever a minimum acceptable level of technical ability and/or quality can be established, and clearly described, to meet the U.S. Government's requirements (e.g., requirements that are or are closely related to commercially available supplies or services). This is the approved method for contracts awarded by posts abroad.
- c. For both methods, selections are based on technical evaluation criteria

(also called "factors" or "factors for award") set forth in the RFP. Technical evaluation criteria serve as the standards against which each proposal is evaluated.

## 14 FAH-2 H-362 PURPOSE OF THE TECHNICAL EVALUATION CRITERIA

*(CT:COR-4; 06-10-2011)*

- a. Preparation of technical evaluation criteria is second only to preparation of the Performance Work Statement (PWS) as the most critical component of the acquisition. Taken together, the PWS and technical evaluation criteria establish the ground rules for an acquisition. The care with which they are developed will have a direct bearing on the quality of the supplies or services received.
- b. The PWS identifies contract objectives and the tasks required to achieve them. The technical evaluation criteria identify the offeror and proposal attributes that have been determined are required to perform the tasks. A contracting officer's representative (COR) should develop the technical evaluation criteria at the same time he or she is writing the PWS.
- c. Because each acquisition is unique, each Request for Proposals (RFP) must identify the evaluation criteria and the relative importance of each criterion so that prospective offerors are aware of the basis for the evaluation of proposals. Criteria should be qualitative and readily understood by both the offerors and evaluators. Evaluation criteria permit an assessment of the merits of proposals against standards, rather than against other proposals. The Federal Acquisition Regulation (FAR) forbids evaluation by comparing proposals against each other; each proposal must be evaluated by comparing it with the solicitation.
- d. All parties, including the Government Accountability Office (GAO) and courts that hear U.S. Government contract disputes, understand that subjective judgments by U.S. Government officials are involved in properly evaluating contractor proposals. Because the evaluation criteria serve as a standard against which all proposals will be evaluated, it is imperative that they emphasize the factors which are critical in the selection of a contractor.
- e. **No evaluation criteria other than those set forth in the solicitation may be used in evaluating the proposals.** This is an absolute requirement that has been sustained by the General Accountability Office (GAO), the Civilian Board of Contract Appeals, and the U.S. courts.

## **14 FAH-2 H-363 DEVELOPING THE TECHNICAL EVALUATION CRITERIA**

*(CT:COR-1; 12-20-2005)*

The technical evaluation criteria should be specific and as detailed as necessary for evaluation of the technical proposals. The following guidelines should be considered in developing technical evaluation criteria:

- (1) Use criteria that relate directly to the purpose or objective of the acquisition and that will truly discriminate between proposals;
- (2) Identify and describe the key programmatic concerns that the offerors must be aware of in preparing their proposals; and
- (3) Use criteria that are mutually exclusive or do not correlate with one another. If one criterion is dependent on another, use one or the other, but not both.

### **14 FAH-2 H-363.1 Selecting Evaluation Criteria**

*(CT:COR-1; 12-20-2005)*

Guidance on developing technical evaluation criteria to aid contracting officer's representatives (CORs) is found in 14 FAH-2 Exhibit H-363.1. If using these criteria, be sure to tailor them to the specific acquisition.

### **14 FAH-2 H-363.2 Describing the Relative Importance of the Criteria**

*(CT:COR-4; 06-10-2011)*

- a. The Request for Proposals (RFP) must state the basis upon which the contract award will be made when the award is based on factors other than lowest probable cost or price. However, the statute requires that price or cost to the U.S. Government must be included as an evaluation criterion. If the quality of the product or service is more important than its cost, then the solicitation must so state. Further, if the evaluation formula is based on an anticipated volume of services or if offerors must attain some level of capacity, the solicitation must disclose this information.
- b. Two principal methods used to indicate relative importance are numerical points or an adjectival description of the relative importance, such as excellent, good, fair, or poor. The contracting officer's representative (COR) and contracting officer must decide whether to use an indication of the relative importance of the criteria or the numerical point method (least preferred).

- c. At the Department, the numerical evaluation system has occasionally been used. However, several problems have surfaced with respect to the use of the numerical system. While this system may appear to bring mathematical precision to the proposal evaluation process, the mechanical application of numerical ratings can produce arbitrary results and obscure the strengths, weaknesses, and risks of the competing proposals. This is especially true when numerical ratings are not supported by a narrative that explains and justifies the assigned ratings. The Comptroller General has repeatedly ruled that "it is improper to rely . . . on a purely mathematical cost/technical tradeoff methodology, unless the application of such a methodology is consistent with the RFP source selection scheme" (GAO decision B-280922, Teltara Inc., December 4, 1998). For example, it is not inherently obvious that a proposal receiving 90 points is necessarily superior to one receiving 84 points "absent a reasonable evaluation of technical merit . . ." (see GAO decision B-281287.6; B-281287.7, Johnson Controls World Services, Inc.; Meridian Management Corporation, June 21, 1999). For this reason, Federal Acquisition Regulation (FAR) 15.305 requires that "the relative strengths, deficiencies, significant weaknesses, and risks supporting proposal evaluation shall be documented in the contract file."
- d. The Comptroller General has ruled that:
- (1) If criteria are weighted by numbers or percent, the highest is displayed first, the rest in descending order of rank;
  - (2) If narrative is used, the specific items are displayed by weight of importance to the project, again in descending order of rank; and
  - (3) If one criterion far outweighs all of the others and it is not assigned a percentage or numerical weight value in the solicitation, then narrative in the solicitation must indicate its great importance.

## **14 FAH-2 H-364 RELATIVE IMPORTANCE OF TECHNICAL AND COST/PRICE CONSIDERATIONS**

*(CT:COR-1; 12-20-2005)*

When cost/price is not assigned actual points that reflect the relationship of cost/price in comparison to the technical criteria, the contracting officer will include a statement in the Request for Proposals (RFP). The contracting officer must ensure that this statement accurately reflects the appropriate balance between price and the technical factors. The following are examples of narrative statements that may be used to reflect this relationship:

- (1) "You are advised that the evaluation of technical proposals and

cost/price are of approximately equal value";

- (2) "You are advised that paramount consideration shall be given to the evaluation of technical proposals rather than cost/price";
- (3) "You are advised that paramount consideration shall be given to cost/price rather than the evaluation of technical proposals."

## 14 FAH-2 H-365 TECHNICAL EVALUATION PLANS

*(CT:COR-7; 06-24-2011)*

- a. The importance of conducting and documenting the proposal evaluation process cannot be overstated. Numerous protests have been upheld due to the lack of adequate documentation of the evaluation and award selection. A rating system helps the technical evaluators assess a proposal's merit with respect to the evaluation criteria in the Request for Proposals (RFP). The most commonly used rating systems are adjectival (such as excellent, good, fair, poor, and unsatisfactory); color coding (such as blue, green, yellow, amber, and red); and numerical (points) (least preferred). However, evaluators are also required to provide narrative assessments supporting all ratings. This rating system is known as a technical evaluation plan.
- b. Ideally, a technical evaluation plan is prepared and submitted with the procurement request package; however, it **must** be prepared prior to receipt of proposals for evaluation. The plan conforms to the evaluation criteria contained in the RFP, and is essentially a tool for the technical evaluation panel to use when evaluating proposals.
- c. Generally, the plan itself is not made a part of the solicitation. The evaluation criteria and description of relative importance are all that is necessary to be in the solicitation. The contracting officer's representative (COR) prepares the plan (with the assistance of the contracting officer, if necessary), and all members of the technical evaluation panel review the plan.
- d. Two sample evaluation plans are presented in 14 FAH-2 Exhibit *H-365(1)* and 14 FAH-2 Exhibit *H-365(2)*. The first sample plan is an example of a plan for the tradeoff process using the adjectival approach; the second is a plan for the lowest-priced technically acceptable process. Please note that these are samples of many formats which may be used. They are not intended to be regarded as definitive models applicable in any or all situations. In these examples, evaluators may record their assessments and comments directly on the plan. Contracting officers may also have sample formats which they prefer to use. The COR should ask the

contracting officer if he or she has a preference with respect to the plan format. For example, the Office of the Procurement Executive (A/OPE) has developed a plan for use by posts abroad for the acquisition of local guard services.

## **14 FAH-2 H-366 THROUGH H-369 UNASSIGNED**

### **14 FAH-2 EXHIBIT H-363.1 GUIDANCE ON DEVELOPING TECHNICAL EVALUATION CRITERIA**

*(CT:COR-1; 12-20-2005)*

Technical evaluation criteria are the standards against which a technical evaluation panel (TEP) measures the quality of each proposal. The solicitation must provide a statement of the relative importance of each factor. This is done in a variety of ways, such as "Factor No. 1 is twice as important as Factor No. 2," or, if weights are used, by assigning weights to the individual criteria to indicate their importance. Evaluation criteria must be tailored to fit the particular requirements of each solicitation and the source selection method used. The relationship of cost/price versus technical factors must also be stated in the solicitation.

The criteria should answer the question, "What attributes and capability must an offeror possess to be able to successfully perform the contract?"

Generic factors are provided as examples that can be adapted to specific acquisitions.

#### **Tradeoff Process**

**Documented evidence of** [**NOTE:** It is not enough for offerors to claim experience, etc. They must provide evidence in their proposals. Such evidence will vary by solicitation. It might include reports, reports from past studies, resumes of key staff, etc.]:

**Prior experience and past performance:** The offeror's demonstrated record, as confirmed by references, of successful past performance of the same or substantially similar contract efforts, including quality of services or supplies, timeliness of performance, cost control, and the offeror's business relations.

[**NOTE:** This criterion is used to evaluate what the offeror has done that is relevant to the work required under the Request for Proposals (RFP) as well as how well the offeror has performed the work. Evaluation will normally include contacting professional and business references, including Federal and other U.S. Government entities, for which the offeror has performed work to verify the quality of the performance. This evaluation should also consider any predecessor companies, key personnel with relevant experience, and subcontractors proposed to perform major or critical portions of the work. When an offeror lacks past performance history as an entity, the TEP should evaluate the past performance of the offeror's principals, predecessor companies, key personnel and major subcontractors in assessing the risk that the offeror presents in fulfilling the contract requirements. Offerors who lack any relevant past performance information must be given a neutral rating under this factor.]

**Qualifications of key personnel:** The qualifications—including relevant prior experience, special training and education—of proposed key personnel.

[**NOTE:** This applies to "key" personnel, i.e., those whose contributions to the contract effort will have a significant impact on the quality of the contractor's performance. The term "personnel" is usually interpreted broadly to include contractor employees, consultants and subcontractor employees.]

**Technical and management capability:** The technical excellence and management capability of the offeror.

[**NOTE:** This may be expressed as "the offeror's proposed approach or methodology to performing the work required in the RFP." This criterion measures how well the offeror's proposal presents an efficient and realistic approach to fulfilling the contract's requirements. It also measures how likely the offeror's proposed organization and management will be successful in performing the work, including its ability to manage subcontracts.]

### **Lowest-Price Technically Acceptable (LPTA) Process**

The criteria used under this process must be specific to the work requirements of each RFP, and they must clearly state what constitutes technical acceptability in measurable terms (e.g., length of experience, type of experience, any required qualifications, training or certification of staff, any required licenses, etc.) The criteria will be more detailed than those used under the tradeoff method. This is because they prescribe the minimum standards that offerors must meet to be determined to be acceptable under each factor (e.g., "Within the two years preceding the submission of this offer, the offeror must

demonstrate that it has managed at least two help desk operations similar to those described in this RFP.”)

**Criteria under the LPTA process are judged on a pass-fail basis only. No other rating or qualitative value may be assigned.** Lack of adequate documentation in a proposal to support a given factor may easily result in a “fail” rating of that factor, i.e., it is not required that the offeror be allowed to submit additional information. On the other hand, the contracting officer may seek additional information if the circumstances warrant.

## **14 FAH-2 EXHIBIT H-365(1)** **SAMPLE TECHNICAL EVALUATION PLAN:** **TRADEOFF SOURCE SELECTION PROCESS**

*(CT:COR-7; 06-24-2011)*

### **Explanatory Notes**

The following sample evaluation plan is for a contract to provide training in crisis management. The contractor will be required to: (1) research, write and conduct crisis management and emergency situation exercises; (2) develop and conduct crisis management training to U.S. Government employees worldwide; and (3) conduct and/or participate in multi-agency task force exercises.

This sample plan does not contain any housekeeping information, e.g., technical evaluation panel (TEP) meeting logistics.

### **Rating Method**

The rating method in this sample uses the adjectival attribute approach. These rating sheets expand upon, but do not alter, the evaluation criteria in the Request for Proposals (RFP). They provide a description of the attributes of a proposal that would qualify it for each rating level. **(CAUTION: These descriptions and the rating plan are not a matter of public record and may not be disclosed to anyone outside the TEP without the express approval of the contracting officer.)**

### **Technical Evaluation Rating Sheets**

**RFP Number:** \_\_\_\_\_

**Offeror:** \_\_\_\_\_

**Evaluator:** \_\_\_\_\_

**Overall Rating:** \_\_\_\_\_



**Acceptability Rating:** \_\_\_\_\_

Instructions:

Complete all of the rating sheets.

For each criterion, check the adjectival rating that reflects your assessment of the proposal against that criterion.

Provide written narrative comments that support your rating in the space provided after each criterion. The comments should be concise, but must be sufficiently detailed to support your position. They must also include specific references (e.g., page or paragraph numbers) to proposal content, or lack of it, that supports your rating. If more space is needed, continue your comments on blank sheets. Comments must address all of the following:

(1) How well the proposal, as submitted, meets the requirements for each criterion;

(2) The strengths, weaknesses and deficiencies (see definitions below) that had a bearing upon the rating;

(3) What would be required to remedy any deficiencies and significant weaknesses; and

(4) The impact the deficiencies and any needed correction to them have on the quality of the offeror's proposal (e.g., the deficiencies are fatal errors that cannot be corrected; the weaknesses may be correctable through discussions and proposal revision).

[**NOTE:** These rating sheets do not cover every possible combination of attributes or lack of them that a proposal may have, nor can they substitute for the evaluator's own judgment. When in doubt about which rating to assign for a given criterion, make your best assessment based upon the content in the proposal. Raise any issue in doubt during the full TEP discussions of the proposal ratings. Please direct all questions to the chairperson or contracting representative.]

The following definitions from Federal Acquisition Regulation (FAR) Part 15 shall apply to the evaluation:

(1) **Deficiency** is a material failure of a proposal to meet a U.S. Government requirement or a combination of significant weaknesses in a proposal that increases the risk of unsuccessful contract performance to an unacceptable level; and

(2) **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.

After completing the rating sheets, assign an overall rating to the proposal. The overall rating is based upon the ratings assigned to the individual criterion, e.g., excellent, good, fair, poor, or unsatisfactory.

Finally, assign an acceptability rating as follows:

**Technically acceptable:** The proposal contains no deficiencies or significant weaknesses. The evaluator is confident that the offeror can successfully perform the contract.

**Technically unacceptable, but capable of being made acceptable through discussions:** The proposal contains enough deficiencies and/or significant weaknesses to question the offeror's ability to successfully perform the contract. Nevertheless, the evaluator believes that the offeror may be able to remedy enough of the deficiencies and weaknesses through discussions to make the proposal acceptable.

**Technically unacceptable:** The deficiencies and weaknesses are great and/or numerous enough that any attempt to remedy them through discussions with the offeror would be tantamount to allowing the offeror to substantially rewrite his or her proposal.

**Criterion 1: Demonstrated experience and past performance in researching, developing and delivering training and related exercises in crisis management to large-scale organizations.**

**Rating criteria:** The offeror has developed and delivered training and related exercises in the areas described in the work statement (or areas similar to those described in the work statement) to large-scale organizations, especially those primarily governmental in nature (such as State, local, or Federal government entities). The offeror complied with contract requirements, used appropriate personnel, and demonstrated technical excellence.

<b>Check (3): Rating Descriptions</b>
<b>Excellent:</b> Offeror develops and provides training and related exercises similar to that called for in the performance work statement to large-scale governmental organizations as a routine part of its business. There were no quality problems.
<b>Good:</b> Offeror develops and provides training and related exercises similar to that called for in the performance work statement to large-scale governmental organizations on an occasional basis; offeror routinely provides training and related exercises to small organizations or nongovernmental organizations. Nonconformances had no effect on achievement of contract requirements.
<b>Fair:</b> Offeror does not develop and provide training and related exercises similar to that called for in the performance work statement to large-scale governmental organizations; offeror routinely provides training and related exercises to small organizations or nongovernmental organizations. Nonconformances required minor resources to ensure achievement of contract requirements.
<b>Poor:</b> Offeror does not develop and provide training and related exercises similar to that called for in the performance work statement to large-scale governmental organizations; offeror occasionally provides training and related exercises to small organizations or nongovernmental organizations. Nonconformances required significant resources to ensure achievement of contract requirements.
<b>Unsatisfactory:</b> Offeror has no experience developing or providing training and related exercises similar to that called for in the performance work statement. Nonconformances compromised achievement of contract requirements.
<b>Unknown:</b> Offeror has no relevant performance record. A thorough search was unable to identify any past performance information.

**Narrative statement supporting rating:**

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**Criterion 2: The qualifications of all proposed key personnel.**

**Rating criteria:** Proposed key personnel are identified, and each meets or exceeds the training and experience requirements for the positions for which each is proposed.

<b>Check (3): Rating Descriptions</b>
<b>Excellent:</b> All key personnel are identified in the proposal, and all meet or exceed the training and experience requirements.
<b>Good:</b> Most key personnel are identified in the proposal, and all meet or exceed the training and experience requirements. For the positions where no key personnel are identified, the offeror has submitted detailed position descriptions and provided a list of potential candidates.
<b>Fair:</b> Some key personnel are identified in the proposal, but some of them do not meet the training and experience requirements. For the positions where no key personnel are identified, the offeror has submitted detailed position descriptions and provided a list of several potential candidates.
<b>Poor:</b> Some key personnel are identified in the proposal, but many of them do not meet the training and experience requirements. For the positions where no key personnel are identified, the offeror has submitted vague position descriptions and few, if any, potential candidates are proposed.
<b>Unsatisfactory:</b> No key personnel are identified in the proposal. Position descriptions are not provided, and no candidates are proposed.

**Narrative statement supporting rating:**

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**Criterion 3: The extent the offeror's proposal presents an efficient and realistic approach to improving the Department's ability to manage crises at all locations, both domestic and overseas, including its ability to effectively and efficiently manage the proposed contract.**

**Rating criteria:** The proposal provides a clear, logical plan for organizing the tasks and feasible methods for delivering crisis management training and related exercises at all locations. The proposed approach reflects a clear understanding of crisis management and adult learning techniques. The timeframes for performing all tasks are realistic. The proposal identifies all subcontracted work, and either

proposes a subcontractor or describes the method of selecting a subcontractor.

<b>Check (3): Rating Descriptions</b>
<p><b>Excellent:</b> The proposed methods are logical and feasible, and they reflect a clear understanding of contract requirements. Offeror is expert in crisis management content and understands the adult learning process. The timeframes for performing all tasks are realistic and reflect the proposed approach. Proposal clearly addresses staffing. All subcontract work and the subcontractors selected to perform the work are identified.</p>
<p><b>Good:</b> The proposed methods are logical and feasible, and they reflect an adequate understanding of contract requirements. Offeror possesses adequate expertise in crisis management content and understands the adult learning process. The timeframes for performing some tasks are unrealistic, but overall the timeframes reflect the proposed approach. Proposal addresses staffing adequately. All subcontract work is identified, as are most of the subcontractors selected to perform the work. The proposal describes the method the offeror will use to select the remaining subcontractors.</p>
<p><b>Fair:</b> While most of the proposed methods reflect an adequate understanding of the contract requirements, some are general or inappropriate. Offeror possesses superficial expertise in crisis management content and the adult learning process. Though the proposed timeframes generally reflect the proposed approach, the timeframes for many tasks are unrealistic. Proposal addresses staffing, but does not provide a detailed breakdown of hours and labor by type. All subcontract work is identified, but proposed subcontractors are not identified. The proposal described the method the offeror will use to select the subcontractors.</p>
<p><b>Poor:</b> Most of the proposed methods are general or inappropriate. Offeror possesses little or no expertise in crisis management content and the adult learning process. The timeframes for most tasks are unrealistic and do not correspond to the proposed approach. Proposal addresses staffing in generic terms, and does not provide a breakdown of hours by labor type or task. All subcontract work is identified, but proposed subcontractors are not identified. The proposal does not describe the method the offeror will use to select the subcontractors.</p>
<p><b>Unsatisfactory:</b> The proposed methods are vague and do not</p>

demonstrate any sort of understanding of the contract requirements, crisis management, or adult learning requirements. Proposal addresses staffing in vague terms or not at all. It is unclear what, if any, work will be subcontracted. The proposal does not describe the methods the offeror will use to select the subcontractors.

**Narrative statement supporting rating:**

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**14 FAH-2 EXHIBIT H-365(2)  
SAMPLE TECHNICAL EVALUATION PLAN:  
LOWEST-PRICE TECHNICALLY ACCEPTABLE  
(LPTA) SOURCE SELECTION PROCESS**

*(CT:COR-7; 06-24-2011)*

**Explanatory Notes**

The following sample evaluation plan is for a contract to provide the logistical support for Department of State conferences, e.g., providing conference planning, selecting the facilities, making the arrangements (hotel, conference room, break-out rooms), etc. Under the lowest-price technically acceptable (LPTA) process, the technical evaluation panel (TEP) evaluates each proposal against the selection criteria on a "pass-fail" or "technically acceptable–technically unacceptable" basis to determine if, as submitted, the proposal is technically acceptable. In other words, the proposal, as written, either meets the acceptability requirements of the criterion, or it doesn't. Beyond that, the TEP does **not** place any qualitative value on it, e.g., the proposal was "excellent," "good," "fair," etc.

The contracting officer later selects the technically acceptable proposal with the lowest evaluated cost/price for contract award, as long as the contractor is determined to be responsible.

This sample plan does not contain any housekeeping information, e.g., TEP meeting logistics.

**Rating Method**

The rating sheets expand upon, but do not alter, the evaluation criteria in the Request for Proposals (RFP). They provide a description of the attributes of a proposal that would make it technically acceptable or unacceptable for each criterion. **(CAUTION: These descriptions and the rating plan are not a matter of public record and may**

**not be disclosed to anyone outside the TEP without the express approval of the contracting officer.)**

### **Technical Evaluation Rating Sheets**

**RFP Number:** \_\_\_\_\_

**Offeror:** \_\_\_\_\_

**Evaluator:** \_\_\_\_\_

**Overall Rating:** \_\_\_\_\_

#### **Instructions:**

Complete all of the rating sheets.

For each criterion, check the box ("acceptable" or "unacceptable") that reflects your assessment of the proposal against that criterion. Circle the items in the corresponding description that reflect your rationale. If a criterion has multiple requirements for acceptability, a proposal must meet all of them. If the criterion has multiple requirements for unacceptability, a proposal need only be deficient under one requirement to receive an unacceptable rating for the entire criterion.

Provide written narrative comments that support your rating in the space provided after each criterion. The comments should be concise, but must be sufficiently detailed to support your position. They must also include specific references (e.g., page or paragraph numbers) to proposal content, or lack of it, that supports your rating. If more space is needed, continue your comments on blank sheets. Comments must address all of the following:

(1) Why the proposal, as submitted, meets or fails to meet each criterion;

(2) The deficiencies (see definition below) that had a bearing upon the rating;

(3) What would be required to remedy any deficiencies; and

(4) The impact the deficiencies and any needed correction to them have on the quality of the offeror's proposal to meet the acceptability standards (e.g., the deficiencies are fatal errors that cannot be corrected; the deficiencies may be correctable through discussions and proposal revision).

**NOTE:** These rating sheets do not cover every possible combination of attributes or lack of them that a proposal may have, nor can they substitute for the evaluator's own judgment. When in doubt about which rating to assign for a given criterion, make your best assessment based upon the content in the proposal. Raise any issue in doubt during the full TEP discussions of the proposal ratings. Please direct all questions to the chairperson or contracting representative.

The following definition from FAR Part 15 shall apply to the evaluation:

**Deficiency** is a material failure of a proposal to meet a U.S. Government requirement or a combination of significant weaknesses in a proposal that increases the risk of unsuccessful contract performance to an unacceptable level.

**Criterion 1: Prior experience and past performance: Documented evidence of the offeror's successful performance of the same or substantially similar services as those required in the RFP, including the ability to support multiple conferences simultaneously, for large-scale organizations within the two years immediately prior to the date of the offeror's proposal. Reference checks demonstrate that within the two years immediately prior to the date of the offeror's proposal, the offeror's work has fully met the satisfaction of all customers.**

**ACCEPTABLE:** All technical requirements of the criterion are met.

**UNACCEPTABLE:** The offeror's proposal fails to include enough information to determine that the acceptability requirements have been met.

**OR:** As evidenced by the offeror's proposal, the offeror has not supported conferences for the required number of minimum years; **or** has not provided all the types of services required by the work statement; **or** has not supported multiple conferences simultaneously; **or** as confirmed by reference checks, the offeror failed to satisfactorily perform work for a customer or customers.

**Narrative statement supporting rating:**

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**Criterion 2: Qualifications of proposed staff: Documented evidence of the offeror's ability to provide key personnel who meet all contract qualifications requirements. All proposed key personnel meet all minimum qualifications requirements specified in the RFP for the duties/positions they are proposed to perform. Where no individual is proposed, the position description is appropriate to the requirements of the duties to**



**be performed and the offeror provides evidence of potential candidates and his or her ability to find and employ individuals with the requisite qualifications.**

**ACCEPTABLE:** All technical requirements of the criterion are met.

**UNACCEPTABLE:** The offeror's proposal fails to include enough information to determine that the acceptability requirements have been met.

**OR:** As described in the proposal, not all proposed key personnel meet all minimum qualifications requirements specified in the RFP for the duties/positions they are proposed to fulfill; **or** the offeror fails to provide adequate position descriptions for unencumbered positions; **or** the proposal provides insufficient information regarding potential employees for unencumbered positions and the offeror's experience in finding and employing individuals with the requisite qualifications.

**Narrative statement supporting rating:**

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**Criterion 3: Management capability: Documented evidence of the offeror's ability to successfully manage contract and subcontract operations. The offeror's proposal documents successful experience (as confirmed by previous clients) in performing adequate conference support services.**

**ACCEPTABLE:** All technical requirements of the criterion are met.

**UNACCEPTABLE:** The offeror's proposal fails to include enough information to determine that the acceptability requirements have been met.

**OR:** The proposal clearly describes insufficient experience and ability to perform the required services; **or** previous clients' level of satisfaction with the offeror's performance is low.

**Narrative statement supporting rating:**

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