

## **APPENDIX D**

### **Sample Evaluation Criteria**

As stated in the User's Guide (from contract clause H-901, Appendix G of Users Guide), award of competitive D/TOs will be made to the Contractor whose proposal is the most advantageous to the Government based on an integrated assessment of evaluation criteria which address technical/management, past performance, and cost/price.

#### **TECHNICAL EVALUATION CRITERIA**

The technical evaluation criteria will be developed by the requiring activity's technical office with assistance from the SbAST Team as needed. This Appendix provides sample evaluation criteria to include the instructions to offerors and evaluation standards. The technical evaluation processes include: (1) Evaluating skill mix, labor hours and/or delivery schedules, (2) Reviewing technical solutions, capacity and/or technical/management approach. (Note: The requiring activity will conduct the technical evaluation).

If information regarding the technical/management approach beyond that received with the initial proposals is required, a brief technical/management proposal will be requested to identify the Contractor's proposed approach to the specific task. The following are examples of technical/management evaluation factors:

#### **Technical**

Mix/Availability of Skills  
Technical solution/approach  
Management approach  
Technical/management approach  
Delivery Schedule or Turnaround Time

#### **Past Performance**

Technical Experience/Knowledge  
*(Extent of Past Performance evaluation is dependent on complexity of requirement)*

The RFOP must identify the information required and explain how that information will be evaluated. You will also need to state the number of pages allowed per factor. Below are examples of the instructions to offerors and the standards for each of the factor examples above. You may use one or more of these examples as stated or tailor them to meet your program needs.

SbAST is intended to limit the evaluation to only those discriminators which allow the Government to make a best value decision. The desired time for contractor proposal submission is 15 business days with Government evaluation requiring 20 business days. Based on these timeframes, extensive evaluations for all requirements are not envisioned. The SbAST team is available to assist in developing and reviewing criteria.

#### **TECHNICAL:**

#### **Mix/Availability of Skills**

Instruction(s) to Offeror – Provide a description of the mix of skills proposed in the numbers needed in the time required that meets the requirement of the *(insert requirements document, e.g. PWS, etc)* dated xxx 20XX. If personnel are subcontracted, the approach illustrates the method of administration and technical control of the subcontractor(s).

Evaluation Standard - The standard is met when the offeror provides an acceptable approach, which meets the requirement of the (*insert requirements document, e.g. PWS, etc*) dated xxx 200\_ and illustrates adequate and appropriate personnel skills. If personnel are subcontracted, the approach illustrates an adequate method of administration and technical control of the subcontractor(s).

### **Technical Solution/Approach**

Instruction(s) to Offeror– Provide a description of offeror’s technical solution/approach to meet the requirements of the (*insert requirements document, e.g. PWS, etc*) dated xxx 200\_.

Evaluation Standard - The standard is met when the proposal provides an acceptable technical solution/approach, which meet requirements of the (*insert requirements document, e.g. PWS, etc*) dated xxx 200\_.

### **Management Approach**

Instruction(s) to Offeror – Provide a description of offeror’s management approach to meet the requirements of the (*insert requirements document, e.g. PWS, etc*) dated xxx 200\_. The proposal should provide all materials and services required to efficiently and effectively manage accomplishments of tasks covered by requirements. You may want to add - The contractor should provide a program plan tailored to accomplishing administrative, management, technical, and financial requirements, as a minimum a milestone chart, projected spending rate and estimated man-hours should be included.

Evaluation Standard - The standard is met when the proposal provides an acceptable approach, which meets requirements of the (*insert requirements document, e.g. PWS, etc*) dated xxx 200\_. This includes all materials and services required to efficiently and effectively manage accomplishments of tasks covered by requirements (add the following if adding additional sentence as highlighted above) and a program plan tailored to accomplishing administrative, management, technical, and financial requirements, as a minimum a milestone chart, projected spending rate and estimated man-hours.

### **Technical/Management Approach**

Instruction(s) to Offeror – Provide a description of offeror’s technical and management approach to meet the requirements of the (*insert requirements document e.g. PWS, etc*) dated xxx 200\_. The proposal should provide all materials and services required to efficiently and effectively manage accomplishments of tasks covered by requirements. You may want to add - The contractor should provide a program plan tailored to accomplishing administrative, management, technical, and financial requirements, as a minimum a milestone chart, projected spending rate and estimated man-hours should be included.

Evaluation Standard - The standard is met when the proposal provides an acceptable approach, which meets requirements of the (*insert requirements document, e.g. PBSOW, SOO etc*) dated xxx 200\_. This includes all materials and services required to efficiently and effectively manage accomplishments of tasks covered by requirements (add the following if adding additional sentence as highlighted above) and a program plan tailored to accomplishing administrative, management, technical, and financial requirements, as a minimum a milestone chart, projected spending rate and estimated man-hours.

### **Delivery Schedule or Turnaround Time**

Instruction(s) to Offeror– Provide a description of offeror’s delivery schedule or turnaround time which meets or exceeds the requirement specified in Section B. If subcontracted, the approach should illustrate the method of administration and technical control of the subcontractor(s).

Evaluation Standard - The standard is met when 1) the proposal provides an acceptable approach to the delivery schedule or turnaround time which meets or exceeds the requirement specified in Section B. 2) If subcontracted, the approach, which illustrates the method of administration and technical control of the subcontractor(s), is acceptable.

### **PAST PERFORMANCE EVALUATION CRITERIA**

For the basic contract period the SbAST team will not perform a new past performance evaluation as the Government completed the evaluation of past performance on the basic SbAST contract, and that evaluation included work that was very similar to what is required for most requirements that will be placed against the SbAST contract. Therefore for purposes of Past Performance the Government will consider all SbAST Primes to currently have acceptable past performance. However, during the basic contract period, if a task/requirement is being placed against the SbAST contract that is not similar to the work that was evaluated under the initial evaluation or the requiring activity requests a targeted Past Performance evaluation, an additional Past Performance evaluation may be required. The Enterprise Acquisition Branch will assist the requirements team in making this determination.

In the event a new past performance evaluation is desired or required the requiring activity must:

- Develop the past performance evaluation criteria
- Determine whose past performance will be evaluated (prime contractor only or prime contractor and subcontractors)

#### **Evaluation Criteria**

- Use Technical Experience/Knowledge criteria – relevancy determination is limited to relevant/not relevant; quality rating is limited to satisfactory, marginal, and undetermined. Relevancy and quality definitions are provided below.
- Offerors will be required to provide three points of contact (POCs) per contract/order referenced in their submission.
- Technical Evaluation team will determine relevancy rating; the **SbAST PCO** will determine quality rating through at least two oral interviews per identified contract/order (Was/is performance successful? Would you award again? Why/why not? Have there been any problems with the contractor's performance? How were those problems remedied?)
- Use PPIRs, CPARS, etc.

#### **Technical Experience/Knowledge**

Instruction(s) to Offeror - Provide a description of the Offeror's knowledge and experience, which demonstrates an understanding of the requirement as outlined in the (*insert requirements document, e.g. PWS, etc*) dated xxx 200\_. For each contract identified, offeror is to identify three points of contact (program manager, QAP, contracting officer/buyer).

Evaluation Standard - The standard is met when the offeror provides an acceptable level of experience/knowledge as required in the (*insert requirements document, e.g. PWS, etc*) dated xxx 200\_.

Technical Experience/Knowledge will receive a rating of either relevant or not relevant, as follows:

**Relevant:** Technical experience/knowledge is determined to be relevant to the (*identify requirement*) based on (*insert rationale for this rating, providing specific examples of how the information provided by the Offeror shows knowledge and experience demonstrating an understanding of the requirement*).

**Not Relevant:** Technical experience/knowledge is determined to be not relevant to the (*identify requirement*) based on (*insert rationale for this rating, providing specific examples of how the information provided by the Offeror shows knowledge and experience demonstrating an understanding of the contract*).

**Quality Definitions** (a quality rating will be assigned to each contract identified by the Offeror in its Technical Knowledge/Experience submission):

**Satisfactory:** A review of the Offeror's past performance record indicates a satisfactory record of quality and timeliness in performance. Performance has been timely and fully acceptable to the Government. In the event of performance problems, all issues have been resolved to the satisfaction of the Government. (*Provide examples from information obtained from the POCs identified by the Offeror, CPARS, PPIRS, etc., on the evaluation form.*)

**Marginal:** A review of the Offeror's past performance record indicates concerns with the offerors' record of quality and timeliness in performance. (*Provide examples from information obtained from the POCs identified by the Offeror, CPARS, PPIRS, etc., on the evaluation form.*)

**Undetermined:** The Government is unable to determine the quality of the offeror's past performance because no information is available