



DEPARTMENT OF THE AIR FORCE
WASHINGTON, DC

OFFICE OF THE ASSISTANT SECRETARY

17 May 2016

Contract Policy Memo 16-C-04

MEMORANDUM FOR ALMAJCOM/DRU/FOA (Contracting)

FROM: SAF/AQC
1060 Air Force Pentagon
Washington DC 20330-1060

SUBJECT: Mandatory Air Force Source Selection Procedures

This memorandum provides the attached revised AFFARS Mandatory Procedures (MP) 5315.3 for conducting Air Force source selections resulting from the publication of Department of Defense (DoD) Source Selection Procedures on 1 Apr 2016 (see <http://www.acq.osd.mil/dpap/policy/policyvault/USA004370-14-DPAP.pdf>). Embedded within the revised MP are hyperlinks to a large number of tailorable templates and samples for assisting source selection teams in preparing various source selection-related documents. Many of these templates are immediately available for use, but some template hyperlinks will not be enabled until updated templates reflecting the new procedures are available. You will be notified as the remaining templates are available for use and the hyperlinks are enabled.

Consistent with the DoD procedures referenced above, this policy change is effective for all acquisitions with a source selection plan approved on or after 1 May 2016. A future Air Force Acquisition Circular will supersede this policy memo.

Please direct any questions to Ms. Stephanie Gisseman, SAF/AQCP, at (571) 256-2382, DSN 260-2382, or stephanie.m.gisseman.civ@mail.mil.

A handwritten signature in black ink, appearing to read "Casey D. Blake".

CASEY D. BLAKE, Major General, USAF
Deputy Assistant Secretary (Contracting)
Assistant Secretary (Acquisition)

Attachment:
Mandatory Procedures MP5315.3

Mandatory Procedure

MP5315.3 - Source Selection

[Revised May 17, 2016]

(INTERIM CHANGE: See Policy Memo [16-C-04](#))

ALERT!!

The Air Force source selection process was changed as a result of the new DoD Source Selection procedures (published 1 Apr 16).

- Use this MP if your Source Selection Plan was approved on or after 1 May 16.
- Use the [previous MP](#) if your Source Selection Plan was approved before 1 May 16.

Table of Contents

Chapter 1 Purpose, Roles, and Responsibilities

- 1.1 Purpose
- 1.2 Applicability and Waivers
- 1.3 Best Value Continuum
- 1.4 Source Selection Team Roles and Responsibilities

Chapter 2 Pre-Solicitation Activities

- 2.1 Conduct Acquisition Planning
- 2.2 Develop a Source Selection Plan
- 2.3 Develop the Request for Proposals
- 2.4 Release the Request for Proposals

Chapter 3 Evaluation and Decision Process

- 3.1 Evaluation Activities
- 3.2 Documentation of Initial Evaluation Results
- 3.3 Award without Discussions
- 3.4 Competitive Range Decision Document
- 3.5 Discussion Process
- 3.6 Final Proposal Revisions
- 3.7 Documentation of Final Evaluation Results
- 3.8 Conduct and Document the Comparative Analysis
- 3.9 Best Value Decision
- 3.10 Source Selection Decision Document
- 3.11 Debriefings
- 3.12 Integrating Proposal into the Contract

Chapter 4 Documentation Requirements

- 4.1 Minimum Requirements
- 4.2 Electronic Source Selection (*No AF text*)

Chapter 5 Definitions

Chapter 6 Mandatory Air Force Source Selection Training

- 6.1 Purpose
- 6.2 Responsibilities of MAJCOM/DRU/AFRCO Senior Contracting Officials (SCO)/AFLCMC and SMC Senior Center Contracting Officials (SCCO)
- 6.3 Required Training for Designated Trainers
- 6.4 Acquisition/Source Selection Team Training
- 6.5 Source Selection Training Material
- 6.6 Training Certificates
- 6.7 Source Selection Training Survey
- 6.8 Continuous Learning Points (CLP)

Appendices (*No AF text*)

Appendix A

Debriefing Guide (*No AF text*)

Appendix B

Tradeoff Source Selection Process: Subjective Best Value Tradeoff and Value Adjusted Total Evaluated Price (VATEP) (*No AF text*)

Appendix C

Lowest Price Technically Acceptable (LPTA) Source Selection Process (*No AF text*)

Chapter 1

Purpose, Roles, and Responsibilities

1.1 Purpose. This Mandatory Procedure (MP) establishes supplemental procedures for conducting competitively negotiated source selections within the Air Force, and follows the numbering convention of the [Department of Defense \(DoD\) Source Selection Procedures](#), dated 31 Mar 2016.

1.2 Applicability and Waivers. This MP must be used in conjunction with [FAR Part 15](#), as supplemented, to include the DoD Source Selection Procedures, related law, regulation, and policy. This MP applies to all negotiated, competitive acquisitions using FAR Part 15 procedures regardless of the dollar value of the acquisition and the process used within the best value continuum.

1.2.1 Acquisitions exempted in the DoD Source Selection Procedures, paragraph 1.2.1, need not comply with this MP. Waivers from this MP must be forwarded for approval through the MAJCOM/DRU/AFRCO SCO (for AFLCMC or SMC, the SCCO) to [SAF/AQC](#).

1.2.4 The DoD Source Selection Procedures require waivers to the provisions of the procedures; therefore, deviations in accordance with FAR Part 1 will not apply and the waiver process will be used. All requests for waiver to any portion of the DoD Source Selection Procedures must be forwarded through the MAJCOM/DRU/AFRCO SCO (for AFLCMC or SMC, the SCCO) to [SAF/AQC](#) for review and processing. Waivers for solicitations valued at \$1 billion or more may only be approved by the Director, Defense Procurement and Acquisition Policy. Waivers for solicitations valued at less than \$1 billion must be approved by the Deputy Assistant Secretary (Contracting) (DAS(C)).

1.3 Best Value Continuum.

1.3.1.4 Value Adjusted Total Evaluated Price (VATEP) is an evaluation methodology that can be used in source selections. VATEP requirements, called “valued requirements,” are characterized by monetization of the different levels of performance between threshold (minimum) and objective (maximum) performance and capabilities. This monetization takes the form of either a downward dollar value or percentage adjustment to offeror’s total evaluated price. The result of the VATEP evaluation is the potential downward adjustment to an offeror’s total proposed price for evaluation purposes only. No further evaluation credit is given for the valued requirements. Valued requirements are not subjectively evaluated using color/adjectival ratings (e.g., blue, purple, green, etc.). Valued requirements should be key discriminators in the source selection. Not every requirement can or should be monetized. VATEP should not be used for acquisitions where the Government would not place any value on a product or service exceeding the Government’s threshold (minimum) technical or performance requirements, such as acquisition of commercial or non-complex services or supplies, or where thresholds (minimum) and objectives (maximum) cannot be established.

1.4 Source Selection Team Roles and Responsibilities. Mandatory Air Force Source Selection Training for members of the acquisition/SST is addressed in [Chapter 6](#).

1.4.1 Source Selection Authority (SSA).

1.4.1.1 SSA Appointment.

SSA Designations	Below \$10M	\$10M to less than \$100M (Note 2)	\$100M and above (Note 3)
ACAT I, IA	(Note 1)	SAF/AQ (Note 6)	SAF/AQ (Note 6)
ACAT II and III	(Note 1)	PEO	PEO
Services Acquisitions	(Note 1)	(Note 5)	PEO (Note 4)
Other Contracting (e.g., commodities, construction)	(Note 1)	(Note 5)	(Note 5)

NOTES:

1. Procuring Contracting Officer (PCO)/equivalent or higher position within the Program Executive Officer (PEO)/requiring organization chain, as designated in the approved acquisition planning document.
2. Delegable to no lower than the PCO/equivalent or higher position within the PEO/ requiring organization chain.
3. In accordance with the DoD Source Selection Procedures dated 1 Apr 2016, paragraph 1.4.1.1, the appointments in this column represent the written appointment of the SSA by the Agency Head for acquisitions of \$100M or more. Delegable to no lower than one level above the PCO or equivalent or higher position within the PEO/ requiring organization chain.
4. Generally, AFPEO/CM is the SSA for A-76 acquisitions involving 300 or more full-time equivalents or services acquisitions >\$100M, unless an executed Services Management Agreement (SMA) has delegated this authority. PEOs are the SSA for programs/acquisitions in their portfolios. For services acquisitions not in a PEO portfolio, see Other Contracting.
5. The SSA is the Center Commander/Wing Commander/PEO or MAJCOM/DRU/AFRCO director-level individual who is responsible for the requirement unless delegated in accordance with Note 2 for acquisitions below \$100M or Note 3 for acquisitions \$100M and above.
6. "SAF/AQ" includes the ASAF(A) and the Principal and Military Deputy.

1.4.1.2 SSA Responsibilities. In addition to the responsibilities listed in FAR 15.303(b), DFARS 215.303(b)(2), and the DoD Source Selection Procedures, the SSA shall:

1.4.1.2.2 Ensure the appointment of the Source Selection Evaluation Board (SSEB) Chairperson on ACAT I competitive acquisitions prior to Milestone B (pre-MDAP on Major Defense Acquisition Program lists) and Services Category (S-CAT) I acquisitions of \$1B or more is approved by the Senior Procurement Executive (SPE). In the absence of the SPE, the Deputy Assistant Secretary (Contracting) (DAS(C)) may approve this appointment.

The Center/Wing Commander must submit a nomination package for SPE approval through the MAJCOM/DRU/AFRCO SCO (for AFLCMC or SMC, the SCCO) to [SAF/AQC](#) and allow 10 working days for SPE approval. The nomination package must describe the candidate's relevant experience and positions held to justify the nomination. SAF/AQCK or AQCA will coordinate the nomination package with the DAS(C) and SPE, who may elect to interview the candidate or request additional nominees for consideration.

1.4.1.2.3 Be accessible to the SST to ensure that necessary leadership and guidance is provided to the SST. Promote active communication within the SST and encourage the team to raise concerns/issues.

1.4.1.2.3.1 Prior to appointing an individual to the SST for an ACAT I, II or S-CAT I source selection, consider their experience identified in the Acquisition Career Management System (ACMS).

1.4.1.2.6 Ensure the [Source Selection Non-Disclosure Agreement \(NDA\)](#) is executed by every individual assigned to the SST (see DoD Source Selection Procedures, Figure 1, for typical SST structure). Ensure individuals who are no longer associated with the source selection are debriefed and the NDA is annotated. For individuals other than those assigned to the SST who must have access to source selection information in the performance of their official duties throughout the year, an NDA may be executed on an annual basis in accordance with [AFFARS 5303.104-4\(a\)](#).

After receipt of proposals (when the offerors/subcontractors are known) and prior to any SST member/advisor accessing a proposal, ensure every SST member executes a [Conflict of Interest Statement](#).

1.4.2 PCO.

1.4.2.1 PCO Selection. Ensure the appointment of the PCO on ACAT I competitive acquisitions prior to Milestone B (pre-MDAP on Major Defense Acquisition Programs) and Services Category (S-CAT) I acquisitions of \$1B or more is approved by the SPE. In the absence of the SPE, the Deputy Assistant Secretary (Contracting) (DAS(C)) may approve this appointment. The Center/Wing Commander must submit a nomination package for SPE approval through the MAJCOM/DRU/AFRCO SCO (for AFLCMC or SMC, the SCCO) to SAF/AQC and allow 10 working days for SPE approval. The nomination package must describe the candidate's relevant experience and positions held to justify the nomination. SAF/AQCK or

AQCA will coordinate the nomination package with the DAS(C) and SPE, who may elect to interview the candidate or request additional nominees for consideration.

1.4.2.2 PCO Responsibilities. In addition to the responsibilities listed in [FAR 15.303\(c\)](#) and the [DoD Source Selection Procedures](#), the PCO shall:

1.4.2.2.3 Manage all source selection documents, control and record all exchanges with offerors, and protect all documents (see [Chapter 4](#)). Source selection material must not be removed, circulated, or disseminated outside of the source selection work area without PCO review and approval. Ensure all means of electronic communications receive additional scrutiny to preclude inadvertent release of documents that contain sensitive or embedded source selection files (i.e., use of secondary reviews before files are released). Using e-mail to transmit source selection information should be done judiciously and it must be encrypted and digitally signed. Include in the subject line the phrase “Source Selection Information – See [FAR 2.101](#) and [3.104](#)”. Use the [Source Selection Information Cover Sheet](#) to identify source selection information.

1.4.2.2.4 Maintain in the official contract file (whether in hard copy or electronic media) all evaluation material and any related supporting information, including minority and dissenting opinions, that has been presented in any form to the SSA as an official record that must not be altered. Updates, revisions, or changes to that evaluation information must be captured in subsequent documentation such that the original record remains distinct.

1.4.2.2.4.1 Working papers, calculations, and personal notes must be clearly identified as such and are not normally part of the official source selection record unless they include information relevant to the source selection decision and the information has not been captured in the official record. Solicit the advice of legal counsel and representatives from the Acquisition Center of Excellence (ACE) (if used) regarding the management and/or retention determination of any paper or digital document generated during the source selection. Legal counsel and the PCO must review any notes, working papers, and other documents for a retention determination at regular intervals during the source selection process and upon completion.

1.4.2.2.4.2 Preserve documents and data that are not stored within the electronic official contract filing system (e.g., classified documents, product samples, electronic media) as part of the official record and identify their physical location.

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

1.4.2.2.7 Send a notice to all appropriate organizations (e.g., user or requirements personnel, public affairs offices, etc.), that could be contacted by offerors or media outlets concerning the requirement or acquisition) concurrent with issuance of the solicitation announcing that a source selection is in progress, regardless of estimated dollar value. For acquisitions estimated at \$100M or more, send the notice to [SAF/AQC](#) for HAF-level notification. The notice shall:

- 1) identify the system, subsystem, service, or project involved;

- 2) identify the anticipated period of the source selection activities;
- 3) include a statement to the effect that contacts or briefings concerning the program by industry are no longer allowed outside of the formal source selection process; and
- 4) state that the PCO (include name and phone number) controls all contact or exchanges with industry/offers and is the only person authorized to release source selection information before and after contract award.

1.4.2.2.11 For ACAT I, II, and S-CAT I source selections, complete and submit the [Source Selection Participants Worksheet](#) to [SAF/AQC](#) using information from the approved Source Selection Plan (SSP) no later than 30 days after contract award or termination/cancellation of source selection.

1.4.2.2.12 Post [source selection lessons learned](#) no later than 90 days after contract award or termination/cancellation of the source selection.

1.4.3 SSAC.

1.4.3.2 SSAC Composition.

1.4.3.2.1 It is preferable that the SSAC Chairperson not be in the chain of command of the SSA.

1.4.3.2.2 For all new Milestone B (Pre-MDAP on Major Defense Acquisition Program lists) ACAT I and II competitive acquisitions, the specific composition of the SSAC should consist of senior leaders (flag rank or 0-6/GS-15/NH-04 to the maximum extent practicable) from Program Management, Engineering, Finance, Legal, Contracting, Small Business, the ACE, and any other participants as determined appropriate by the SSA, who have recent experience in the successful conduct of source selections. The SSAC may be augmented with senior leaders from the SAF/AQ staff, when appropriate, to provide additional experience and expertise. The SSAC may also be supplemented by other subject matter experts at comparable functional positions. For non-weapon system acquisitions when an SSAC is used, the specific composition of the SSAC is at the discretion of the SSA, based upon the expertise required to accomplish a successful source selection.

1.4.4 SSEB.

1.4.4.4 SSEB Responsibilities.

1.4.4.4.1 In addition to the responsibilities listed in the [DoD Source Selection Procedures](#), the SSEB Chairperson shall:

1.4.4.4.1.2 Upon request of the SSA, for ACAT I or II and S-CAT I source selections, obtain a list of individuals with source selection experience from [SAF/AQC](#) and provide the list to the

SSA (see paragraph 1.4.1.2.3), The request for this list of individuals must include the following information:

- 1) Name and role of individual requesting the list (e.g., SSA, SSEB Chairperson, PCO, etc.);
- 2) Purpose of the request (e.g., identify potential SST or MIRT members); and
- 3) The specific information needed (e.g., technical personnel, personnel with S-CAT I experience, etc.).

1.4.4.4.1.7 It is considered a best practice for the Program Manager (PM), when one is assigned, to serve as the SSEB Chairperson.

1.4.4.4.3 For source selections without an SSAC, the SSEB Chairperson must determine if the SSA wants the SSEB to perform the comparative analysis and provide the comparative analysis and an award recommendation in the SSEB Final Report. This decision shall be documented in the source selection plan.

1.4.6 Other Advisors.

1.4.6.1 Government Advisors. Foreign Military Sales (FMS) customers and international cooperative project partners may only participate in the source selection process as advisors. The PCO must not disclose to the FMS customer any form of cost or price data that is proprietary unless the offeror authorizes its release.

Chapter 2

Pre-Solicitation Activities

2.1 Conduct Acquisition Planning (*No AF text*).

2.2 Develop a Source Selection Plan (SSP).

The PCO and the SSEB chair, with assistance from SSEB members, as necessary, prepare the SSP.

2.2.5 When using VATEP, address the decision to use, or not use, an affordability cap, along with supporting rationale for the decision. If an affordability cap will be used, describe how it will be evaluated and whether offerors whose proposals exceed the affordability cap will be eligible for award.

2.2.6 Briefing charts shall not serve as the SSEB Initial Report, Competitive Range Decision Document, updated SSEB Initial Report, or SSEB Final Report, but may be used to present summaries of these reports to the SSA. If briefing charts are used to comply with any other source selection documentation requirements set forth in the DoD Source Selection Procedures, a written script for each briefing must be maintained in the permanent contract file.

2.2.9 Section 9.0 of the SSP (“Securing Source Selection Materials”) must include a plan and procedures which address the filing, protection, handling, maintenance, retention and disposition of all documents that constitute the complete source selection record. For those source selections utilizing an electronic system for source selection documentation, the SSP must include the process for handling documentation, such as the process for documenting the basis for any changes made to an evaluator’s finalized document. The plan must address training for all SST members to familiarize them with the plan/procedures and mechanism(s) to ensure compliance with the plan/procedures. See the [Source Selection Plan](#) template.

2.2.10 The PCO shall maintain the SSP after approval. Subsequent proposed changes to the source selection organization, to include the SSEB and the SSAC (when used), shall be documented in an addendum to the SSP and approved by the SSA unless the SSA delegates this approval responsibility to the SSEB Chairperson within the SSP.

2.3 Develop the Request for Proposals.

2.3.1 See the tailorable RFP [Section L](#) templates (in work) and [Section M](#) templates (in work).

2.3.4.1 Cost or Price. The analysis technique(s) identified in [FAR 15.404](#), as supplemented, for the evaluation of the proposed cost or price shall be included in the evaluation criteria (Section M or equivalent provisions of the solicitation for commercial acquisitions).

2.3.4.1.1 When used, the Probable Cost estimate is the government estimate of the cost to acquire specified goods and/or services based on each offeror’s proposed approach. The

Probable Cost is based upon an analysis of each offeror's unique proposal in accordance with [FAR 15.404-1](#). Define all the components that make up the aggregate government Probable Cost and specify them in Section M (or equivalent provisions of the solicitation for commercial acquisitions).

2.3.4.1.2 For ACAT programs, the DAS(C) must approve any use of Most Probable Life Cycle Cost (MPLCC) as an evaluation criterion. The SSEB Chairperson, with the assistance of the PCO, must prepare the request for approval to include the rationale and methodology to use MPLCC as an evaluation criterion. Such request will be submitted to [SAF/AQC](#) 10 working days prior to convening the acquisition strategy panel (ASP) or the staffing of the Life Cycle Management Plan/Life Cycle Sustainment Plan/Acquisition Plan, whichever occurs first.

2.3.4.2.4 Affordability Cap. When an affordability cap is established, the affordability cap must be specified in the RFP and affordability must be included either as a go/no go gate or as an evaluation criterion in the RFP. The RFP must state whether proposals that exceed the affordability cap can be considered for award.

2.4 Release the Request for Proposals (*No AF Text*).

Chapter 3

Evaluation and Decision Process

3.1 Evaluation Activities.

3.1.1.5 When [FAR 52.222-46](#), Evaluation of Compensation for Professional Employees (February 1993), is included in the RFP, the Government shall evaluate whether all offerors considered for award understand the contract requirements and have proposed a compensation plan appropriate for those requirements. This evaluation may be accomplished through a technical subfactor to evaluate offerors' proposed management approach and or/staffing plan.

3.2 Documentation of Initial Evaluation Results.

3.2.1 SSEB Initial Evaluation. The SSEB Initial Report is used to document the results of the SSEB's initial evaluation. The rationale for initial evaluation results and assignment of initial ratings will be fully and contemporaneously documented in the SSEB Initial Report. The SSEB Initial Report shall be signed by the PCO and SSEB Chairperson after the completion of initial evaluations and prior to presentation of the initial evaluation results to the SSA. See the following tailorable templates:

[SSEB Report](#)
[Initial Evaluation Briefing](#)

3.3 Award without Discussions.

3.3.3 The PCO must obtain contract clearance approval in accordance with [AFFARS 5301.9000\(e\)\(1\)](#) prior to the SSA making the decision to award without discussions.

3.4 Competitive Range Decision Document (CRDD).

3.4.1 See the tailorable [Competitive Range Decision Document](#) template.

3.5 Discussion Process.

3.5.4.1 When addressing adverse past performance with an offeror, the names of individuals who provided information about the offeror's past performance must not be disclosed.

3.5.5 The PCO may provide offerors in the competitive range with their own initial ratings and results of their own initial pricing analysis or total evaluated price. When interim ratings and pricing analysis are provided prior to requesting final proposal revisions, the ratings must reflect the results of discussions with the offeror. PCOs may use the actual briefing charts used to brief the SSA as a method of disclosing an offeror's ratings and price analysis to them. The PCO must require offerors to provide proposal change pages along with their EN responses for any aspect of the proposal that will be incorporated into the awarded contract.

3.5.7 The SSEB Initial Report shall be updated, as necessary, following evaluation of offeror responses to discussions. The rationale for updated (interim) evaluation results and assignment of updated (interim) ratings will be fully and contemporaneously documented in the SSEB initial Report. The updated SSEB Initial Report is reviewed by the SSAC (if an SSAC is used) and must include, if applicable, any minority and dissenting opinion(s). At a minimum, the report shall be updated and signed by the PCO and SSEB Chairperson prior to presentation of the pre-Final Proposal Revisions evaluations and briefing to the SSA.

See the following tailorable templates:

[SSEB Report](#)
[Pre-Final Proposal Revisions \(FPR\) Request Briefing](#)

3.6 Final Proposal Revisions.

3.6.3 The PCO must obtain contract clearance approval in accordance with [AFFARS 5301.9000\(e\)\(2\)\(i\)](#) prior to submission of all material (e.g., Pre-FPR briefing) to the SSA to obtain approval for releasing the FPR request.

3.7 Documentation of Final Evaluation Results.

3.7.1 The rationale for final evaluation results and assignment of final ratings will be fully and contemporaneously documented in the SSEB Final Report. The SSEB Final Report is prepared by the SSEB and reviewed by the SSAC (if an SSAC is used) and signed by the PCO and SSEB Chairperson after the evaluation of FPRs. See the following tailorable template:

[SSEB Report](#)

3.7.2 The SSEB Final Report must document, if applicable, any minority and dissenting opinion(s).

3.7.3 A decision briefing, prepared by the SSEB, will generally be conducted whenever the SSA is other than the PCO. See the following tailorable template:

[Final Decision Briefing](#)

3.8 Conduct and Document the Comparative Analysis.

3.8.1 The SSAC's comparative analysis and award recommendation is documented in the Comparative Analysis Report and Award Recommendation (CAR). See the tailorable [Comparative Analysis Report and Award Recommendation](#) template.

3.9 Best Value Decision.

3.9.1 The PCO must obtain contract clearance approval prior to the SSA making a source selection decision in accordance with [AFFARS 5301.9000\(e\)\(2\)\(ii\)](#).

3.10 Source Selection Decision Document.

3.10.1 See the tailorable [Source Selection Decision Document \(SSDD\)](#) template.

3.11 Debriefings (*No AF Text*).

3.12 Integrating Proposal into the Contract.

The RFP must advise offerors that the awarded contract document will reflect all beneficial aspects of the awardee's proposal and all above threshold (minimum) attributes, performance levels, or capabilities for which evaluation credit was given in the source selection process (e.g., purple or blue technical or technical/risk rating, above threshold elements proposed for VATEP valued requirements), regardless of source selection process utilized.

Chapter 4

Documentation Requirements

4.1.13 All briefing charts presented to the SSA (including, but not limited to, competitive range briefing charts, pre-FPR request briefing charts, and decision briefing charts) must be included in the permanent contract file.

4.1.15 Evaluation worksheets and summaries shall be included in the permanent contract file.

Additional Guidance:

- [Protection, Maintenance, Retention, and Disposition of Source Selection Data](#)

Templates: A comprehensive collection of tailorable templates is provided below.

- [Abstract of Proposals/Quotations \(Negotiated Procurement\)](#)
- **Source Selection Documentation Templates**
 - [Client Authorization Letter](#)
 - [Delegation of Source Selection Authority \(SSA\)](#)
 - [Past Performance Questionnaire \(Sample 1\)](#)
 - [Past Performance Questionnaire \(Sample 2\)](#)
 - [Past Performance Questionnaire \(Sample 3\)](#)
 - [Section L Templates](#) (in work)
 - [Section L Attachment - Past Performance Information](#)
 - [Section M Templates](#) (in work)
 - [Solicitation Cross Reference Matrix](#)
 - [Source Selection File Checklist](#)
 - [Source Selection Plan](#)
 - [Subcontractor Consent Letter](#)
 - [Verification of Correspondence Going to Offeror](#)
- **Source Selection Evaluation Board (SSEB) Templates**
 - [Rating Team Worksheet \(Methodology 1\)](#)
 - [Rating Team Worksheet \(Methodology 2\)](#)
 - [Rating Team Worksheet \(PPT\)](#)
 - [Tradeoff Technical Evaluator Template](#)
 - [LPTA Technical Evaluator Template](#)
 - [Tradeoff Subfactor Chief Template](#)
 - [LPTA Subfactor Chief Template](#)
 - [Evaluation Notice \(EN\)](#)
 - **Past Performance Evaluation Team Documents**

- [Relevancy Template](#)
- [Tradeoff Performance Quality Template](#)
- [LPTA Performance Quality Template](#)
- [Business Relationship Template](#)
- [Past Performance Information Template](#)
- [Tradeoff Past Performance Confidence Assessment Template](#)
- [LPTA Past Performance Evaluation Template](#)
- [Performance Confidence Rating Evaluation](#)

- **Cost/Price Evaluation Team Document**
 - [Cost/Price Template](#)

Chapter 5

Definitions

Comparative Analysis Report (CAR). The CAR documents the SSAC's comparative analysis of the proposals and award recommendation to the SSA.

Chapter 6

Mandatory Air Force Source Selection Training

6.1 Purpose

This chapter establishes and standardizes the mandatory Air Force source selection training process for acquisition/source selection teams.

6.2 Responsibilities of the MAJCOM/DRU/AFRCO Senior Contracting Officials (SCO) and the AFLCMC and SMC Senior Center Contracting Officials (SCCO).

SCOs/SCCOs must: (a) implement a robust source selection training program; (b) designate a Training Manager/Point of Contact (POC); and (c) designate experienced source selection trainers and provide current lists of the Training Managers/POCs and trainers to the [SAF/AQC](#) Field Support Team. The lists should be updated as necessary, but at a minimum shall be updated annually. See the [Designation of Source Selection Training Manager/Trainers](#) template.

6.3 Required Training for Designated Trainers.

6.3.1 Designated trainers must receive “Train-the-Trainer” training and be certified as source selection trainers by SAF/AQC, per paragraph 6.6. Periodic “Train-the-Trainer” sessions can be arranged directly with the [SAF/AQC](#) Field Support Team. This training is provided to designated trainers and shall not be used by source selection teams and other individuals to satisfy the source selection training requirements set forth in paragraph 6.4.1.

6.3.2 Training Managers/POCs must maintain a record of the source selection training provided by designated trainers, including the name of the acquisition, training date, names of individuals trained, and training provided (e.g., Phase I (Acquisition Planning) or Phase II (Source Selection Execution) training).

6.3.3 Designated trainers who have not conducted source selection training within a one (1) year period must be recertified by SAF/AQC. Recertification requires that the SCO/SCCO confirm the individual’s continued designation as a source selection trainer and that the individual re-complete the SAF/AQC “Train-the-Trainer” training.

6.4 Acquisition/Source Selection Team Training.

6.4.1 Conducting Source Selection Training Sessions.

Source selection training must be presented to the entire SST, including the SSA, SSAC Chair and members, PM (where one is assigned), RO, and all advisors. Independent review of source selection training materials by SST members and/or attendance at SAF/AQC “Train-the-Trainer” training is not sufficient to satisfy this training requirement.

- Specialized executive level training modules are available for the [SSA](#) and [SSAC](#).

- **Phase I** (Acquisition Planning) training should be presented at the earliest stage of an acquisition and covers the acquisition process up to release of the RFP.
- **Phase II** (Source Selection Execution) training is presented prior to or immediately after receipt of proposals.

6.4.2 Training Content and Process.

Trainers must use the source selection training modules developed by SAF/AQC and tailor them, as needed, to meet the unique elements of the specific acquisition.

The **Ethics, Procurement Integrity, and Conflicts of Interest** topic should be presented by the local legal advisor. Copies of this briefing are integrated in both Phase I and Phase II source selection training materials. The length of the source selection training and the level of detail presented in either Phase I (Acquisition Planning) or Phase II (Source Selection Execution) depends on the complexity of the specific acquisition and the experience level of the SST.

6.4.3 Advance Preparation.

Effectiveness of the source selection training experience can be enhanced with advance preparation. The Defense Acquisition University (DAU) offers [continuous learning modules](#) on source selection and related topics. Some suggested DAU courses include the following:

[CLC 004](#) - *Market Research*

[CLC 007](#) - *Contract Source Selection*

[CLC 028](#) - *Past Performance Information*

[CLC 132](#) - *Organizational Conflicts of Interest*

[CLM 049](#) - *Procurement Fraud Indicators*

6.5 Source Selection Training Material.

The Source Selection Training Modules, Trainer's Lesson Plans, and Resource/Reference Material are accessible by designated trainers and training managers on the [Source Selection Train the Trainers](#) website.

6.6 Training Certificates.

The SAF/AQC Field Support Team will provide a Source Selection Training Certificate to the Training Managers/POCs and Trainers who have completed the source selection training. Trainers must provide the Source Selection Training Certificate for [Phase I](#) and [Phase II](#) to the personnel they train.

6.7 Source Selection Training Survey.

Following training, personnel are encouraged to complete the [Source Selection Training Survey](#) (AF Contracting Central > Knowledge Center > Field Support). The feedback provided through the survey will enable the SAF/AQCP Field Support Team to gauge the effectiveness of its source selection training and improve it.

6.8 Continuous Learning Points (CLP).

As a general rule, CLPs must be given based on the length and intensity of the training provided. As a rule, grant six (6) CLPs for each full day of instruction, three (3) CLPs for half-day, and one (1) CLP for a two-hour session.

Appendices

Appendix A

Debriefing Guide (No AF Text)

Appendix B

Tradeoff Source Selection Process: Subjective Tradeoff and Value Adjusted Total Evaluated Price (VATEP) Tradeoff (No AF Text)

Appendix C

Lowest Price Technically Acceptable (LPTA) Source Selection Process (No AF Text)