Mandatory Procedure

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## MP5315.3 Source Selection

[2019 Edition]

### 1 PURPOSE, ROLES, AND RESPONSIBILITIES

**1.1 Purpose**

This Mandatory Procedure (MP) establishes supplemental procedures for conducting competitively negotiated source selections of $10M or more within the Air Force (AF), and follows the numbering convention of the [Department of Defense (DoD) Source Selection Procedures](http://www.acq.osd.mil/dpap/policy/policyvault/USA004370-14-DPAP.pdf), dated 31 Mar 2016.

**1.2 Applicability and Waivers**

This MP must be used in conjunction with FAR 15, as supplemented, to include the DoD Source Selection Procedures, related law, regulation, and policy. **As guidance, this MP also provides hyperlinks to best practices, tailored RFP and contract language, tailorable templates for use as desired, and training material, as well as links to PGI 5315.3 language.**

1.2.1.1 Acquisitions with an estimated dollar value less than or equal to $50M may use price as the only evaluated factor and therefore be exempt from the DoD Source Selection Procedures dated 31 March 2016 and from this MP if all of the following conditions are met:

1) The requirement is non-complex and well-defined, such that consideration of non-cost/price evaluation factors (e.g., technical, past performance, etc.) would not provide any meaningful differentiation amongst proposals and would add no value to the selection of a successful offeror;

2) Past performance record and history will be assessed as one of the multiple standards required for a successful offeror to be determined responsible as described in FAR 9.104;

3) Use of price as the only evaluation factor is the most advantageous approach to the government; and

4) The acquisition strategy approving official has determined that use of price as the only evaluated factor is the most appropriate source selection methodology for the requirement and the justification for this determination is included in the approved acquisition strategy/plan.

1.2.1.2 A waiver allowing the use of price as the only evaluated factor for an acquisition with an estimated dollar value greater than $50M may be granted on an acquisition specific basis by the SCO upon the waiver authority’s determination that the conditions at 1.2.1.1 (1)-(4) are met.

1.2.4Waivers.Waivers for solicitations valued at $1B or more for approval by the Director, Defense Pricing and Contracting (DPC), must be forwarded through the SCO to [SAF/AQC](mailto:SAF.AQ.SAF-AQC.Workflow@us.af.mil) for review and processing. Waivers for solicitations above $10M but less than $1B must be approved by the SCO.

1.2.4.1. Waiver procedures apply only to the DoD Source Selection Procedures and this MP. The requirements of FAR 15.3, as supplemented, cannot be waived as these requirements are subject to the FAR deviation process. Deviation approval levels are set forth in [AFFARS 5301.403(1)(ii))](AFFARS-PART-5301.docx#p5301403) and [5301.404(b)](AFFARS-PART-5301.docx#p5301404)(i).

**1.3 Best Value Continuum (*No AF Text*)**

**1.4 Source Selection Team Roles and Responsibilities**

Mandatory Air Force Source Selection Training for members of the acquisition/Source Selection Team (SST) is addressed in  [Section 6](#C6).

1.4.1 Source Selection Authority (SSA).

1.4.1.1 SSA Appointment.

|  |  |  |  |
| --- | --- | --- | --- |
| **SSA Designations** |  | **$10M to less than $100M** (Note1) | **$100M and above**  (Note 2) |
| Program Acquisition Category (ACAT) I, IA |  | SAF/AQ (Note 3) | SAF/AQ (Note 3) |
| ACAT II and III |  | Program Executive Officer (PEO) | PEO |
| Operational & Enterprise (including services EXEMPT from [AFI 63-138](http://static.e-publishing.af.mil/production/1/saf_aq/publication/afi63-138/afi63-138.pdf)) |  | (Note 4) | (Note 4) |
| Operational & Enterprise Services Acquisitions subject to [AFI 63-138](http://static.e-publishing.af.mil/production/1/saf_aq/publication/afi63-138/afi63-138.pdf) | SSA is the Services Designated Official (SDO) as designated in [AFI 63-138](http://static.e-publishing.af.mil/production/1/saf_aq/publication/afi63-138/afi63-138.pdf), Table 2.1, the Services Management Agreement (SMA), if applicable, and the SDO delegation letter. | | |
| **NOTES:**  **1.** Delegable to no lower than the Procuring Contracting Officer (PCO)/equivalent or higher position within the PEO/ requiring organization chain.  **2.** Appointments in this column represent the written appointment of the SSA by the Agency Head. Delegable to no lower than one level above the PCO or equivalent or higher position within the PEO/ requiring organization chain.  **3.** “SAF/AQ” includes the ASAF(A) and the Principal and Military Deputy.  **4.** 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 1 for acquisitions $10M to less than $100M or Note 2 for acquisitions $100M and above. | | | |

See [AFMC PGI 5315.3 (1.4.1.1)](AFFARS-PGI_PART-pgi_5315.docx).

See [SMC PGI 5315.3 (1.4.1.1)](AFFARS-PGI_PART-pgi_5315.docx).

See [USAFA 5315.3 (1.4.1.1)](AFFARS-PGI_PART-pgi_5315.docx).

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:

1.4.1.2.3 Be accessible to the PCO, SSEB Chairperson and SSAC Chairperson (if applicable) 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.

1.4.1.2.6 See the following tailorable templates:

1.4.1.2.6.1 [*Source Selection Non-Disclosure Agreement (NDA)*](https://cs2.eis.af.mil/sites/10059/afcc/knowledge_center/templates/ss_non-disclosure_agreement.pdf)*.* An NDA may be executed on an annual basis in accordance with [AFFARS 5303.104-4(a)](AFFARS-PART-5303.docx).

1.4.1.2.6.2 [*Conflict of Interest Statement*](https://cs2.eis.af.mil/sites/10059/afcc/knowledge_center/templates/conflict_of_interest_statement.pdf).

1.4.2 PCO.

1.4.2.2 PCO Responsibilities. In addition to the responsibilities listed in FAR 15.303(c) and the [DoD Source Selection Procedures](http://www.acq.osd.mil/dpap/policy/policyvault/USA004370-14-DPAP.pdf), the PCO shall:

See [SMC PGI 5315.3 (1.4.2.2)](AFFARS-PGI_PART-pgi_5315.docx).

1.4.2.2.2 See suggested RFP Section L language for [Use of Non-Government Advisors](https://cs2.eis.af.mil/sites/10059/afcc/knowledge_center/Documents/AFFARS_Library/5315/samples/use_of_non-government_advisors.docx).

1.4.2.2.3 Manage all source selection documents, control and record all exchanges with offerors, and protect all documents (see [Section 4](#C4)). 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. Prior to transmission of Source Selection Information to offerors via any means, the information should be reviewed by a second person to preclude inadvertent inclusion of inappropriate data. Additionally, Source Selection Information transmitted to offerors electronically (e.g., via email or disc) or posted to a website must be distributed in a “locked” format, such as scanned .pdf file, .jpeg file, or other protected format. An exception to the format requirement is when offerors are required to fill-in or complete portions of a document, such as Section K Representations and Certifications, or a pricing matrix. 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*](https://cs2.eis.af.mil/sites/10059/afcc/knowledge_center/templates/ss_info_cover_sheet.pdf) to identify source selection information. For RFPs released after 30 November 2020, use the [*SF 901 Controlled Unclassified Information (CUI) Cover Sheet (AF Template)*](https://cs2.eis.af.mil/sites/10059/afcc/knowledge_center/templates/ss_info_cover_sheet_USAF_CUI_SF901.docx). A sample [*Verification of Correspondence Going to Offeror checklist*](https://cs2.eis.af.mil/sites/10059/afcc/knowledge_center/templates/verification_of_correspondence_to_offeror.xls) may be utilized.

See [AFMC PGI 5315.3 (1.4.2.2.3)](AFFARS-PGI_PART-pgi_5315.docx).

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.

1.4.2.2.4.3 Ensure that any requests for source selection delegations are properly accomplished and documented in the source selection file.   
1.4.2.2.7Send 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. For acquisitions estimated at $100M or more, send the notice to [SAF/AQC](mailto:SAF.AQ.SAF-AQC.Workflow@us.af.mil) 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/offerors and is the only person authorized to release source selection information before and after contract award.

See tailorable template for [Notice Announcing that a Source Selection is in Progress](https://cs2.eis.af.mil/sites/10059/afcc/knowledge_center/Documents/AFFARS_Library/5315/samples/soure_selection_notification.docx).

See [SMC PGI 5315.3 (1.4.2.2.7)](AFFARS-PGI_PART-pgi_5315.docx).

1.4.2.2.11 Post [*source selection lessons learned*](https://cs2.eis.af.mil/sites/10059/afcc/knowledge_center/lessons_learned/SitePages/Home.aspx) 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.

1.4.4.4.1.7 It is considered a best practice for the Program Manager (PM), when one is assigned, to serve as the SSEB Chairperson. It is also a best practice that the SSEB chair not serve in multiple roles.

1.4.4.4.3 For source selections without an SSAC, the SSEB Chairperson must document in the source selection plan, whether or not the SSA wants the SSEB to perform the comparative analysis of proposals and provide that analysis and an award recommendation in the SSEB Final Report. .

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.

See [AFMC PGI 5315.3 (1.4.6.1)](AFFARS-PGI_PART-pgi_5315.docx).

1.4.6.2.2 Limitations on use of nongovernment advisors. Nongovernment advisors shall not attend the past performance portion of evaluation briefings.

See [AFMC PGI 5315.3 (1.4.7.2)](AFFARS-PGI_PART-pgi_5315.docx).

### 2 PRE-SOLICITATION ACTIVITIES

See [SMC PGI 5315.3 (2)](AFFARS-PGI_PART-pgi_5315.docx).

**2.1 Conduct Acquisition Planning**

See [SMC PGI 5315.3 (2.1.2.1)](AFFARS-PGI_PART-pgi_5315.docx).

See [SMC PGI 5315.3 (2.1.2.2)](AFFARS-PGI_PART-pgi_5315.docx).

See [AFMC PGI 5315.3 (2.1.2.3)](AFFARS-PGI_PART-pgi_5315.docx).

See [SMC PGI 5315.3 (2.1.2.3)](AFFARS-PGI_PART-pgi_5315.docx).

**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 Evaluation Factors and Subfactors. 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 Documentation. 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 official (permanent) contract file. Briefings should summarize the evaluation and not duplicate the content of written reports. See *Best Practices for Documentation Reviews.*

2.2.9 Securing Source Selection Materials. Section 9.0 of the SSP (“Securing Source Selection Materials”) must include a plan and procedures which address the filing, protection, handling, maintenance, release, 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*](https://cs2.eis.af.mil/sites/10059/afcc/knowledge_center/templates/ss_plan.docx) 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 Evaluation Factors/Subfactors. See RFP[*Section L* and *M* samples](https://cs2.eis.af.mil/sites/10059/afcc/knowledge_center/Pages/5315-main.aspx#samples).

See [AFMC PGI 5315.3 (2.3.1)](AFFARS-PGI_PART-pgi_5315.docx).

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(d). 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).

2.3.4.2.4 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.

2.3.6. Requirements that fall within the areas of traditional offeror responsibility factors may trigger the Small Business Administration Certificate of Competency (CoC) process if such requirements are evaluated on an acceptable/unacceptable basis, as a rating of unacceptable for an otherwise apparently successful business offeror equates to a non-responsibility determination. For example, issues related to facility clearance/security requirements or evaluation of professional employee compensation as an element of responsibility are areas that may trigger the CoC process for small business offerors. PCOs should consult with small business and legal counsel regarding the use and treatment of such evaluation factors/subfactors.

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

### 3 EVALUATION AND DECISION PROCESS

**3.1 Evaluation Activities**

3.1.1.5 When FAR 52.222-46, Evaluation of Compensation for Professional Employees (Feb 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, or including the evaluation under the cost/price factor or as a “Volume I” proposal submission and element of proposal compliance and offeror responsibility.

3.1.1.5.1 When including the professional employee compensation evaluation as a “Volume I” proposal submission and element of proposal compliance and offeror responsibility in a source selection with small business offerors, a finding of non-responsibility due to an inadequate professional employee compensation plan for an otherwise successful small business offeror requires the PCO to engage the Small Business Administration Certificate of Competency (CoC) process.

**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*](https://cs2.eis.af.mil/sites/10059/afcc/knowledge_center/templates/sseb_report.docx)[*Initial Evaluation Briefing*](https://cs2.eis.af.mil/sites/10059/afcc/knowledge_center/templates/Initial_evaluation_briefing.pptx)

**3.3 Award without Discussions**

3.3.3 Documentation Required Prior to Contract Award. The PCO must obtain contract clearance approval in accordance with [AFFARS 5301.9000(e)(1)](AFFARS-PART-5301.docx#p53019000e) prior to the SSA making the decision to award without discussions.

**3.4 Competitive Range Decision Document**

3.4.1 See the tailorable [*Competitive Range Decision Document*](https://cs2.eis.af.mil/sites/10059/afcc/knowledge_center/templates/competitive_range_decision_document.docx) *(CRDD)* template.

**3.5 Discussion Process**

See [SMC PGI 5315.3 (3.5.4)](AFFARS-PGI_PART-pgi_5315.docx).

3.5.5 Best Practices. 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*](https://cs2.eis.af.mil/sites/10059/afcc/knowledge_center/templates/sseb_report.docx)[*Pre-Final Proposal Revisions (FPR) Request Briefing*](https://cs2.eis.af.mil/sites/10059/afcc/knowledge_center/templates/pre-FPR_request_briefing.pptx)

**3.6 Final Proposal Revisions**

3.6.3 The PCO must obtain contract clearance approval in accordance with [AFFARS 5301.9000(e)(2)(i)](AFFARS-PART-5301.docx#p53019000e) 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 tailorable [*SSEB Report*](https://cs2.eis.af.mil/sites/10059/afcc/knowledge_center/templates/sseb_report.docx)template.

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 tailorable [*Final Decision Briefing*](https://cs2.eis.af.mil/sites/10059/afcc/knowledge_center/templates/final_decision_brief.pptx)template.

**3.8 Conduct and Document the Comparative Analysis**

3.8.1 The SSAC’s comparative analysis of proposals and award recommendation is documented in the Comparative Analysis Report and Award Recommendation (CAR). See the tailorable [*Comparative Analysis Report and Award Recommendation*](https://cs2.eis.af.mil/sites/10059/afcc/knowledge_center/templates/comparative_anal_rpt_and_award_rec.docx) template.

**3.9 Best Value Decision**

3.9.1 The PCOmust obtain contract clearance approval prior to the SSA making a source selection decision in accordance with [AFFARS 5301.9000(e)(2)(ii)](AFFARS-PART-5301.docx#p53019000e).

**3.10 Source Selection Decision Document**

3.10.1 See the tailorable [*Source Selection Decision Document (SSDD)*](https://cs2.eis.af.mil/sites/10059/afcc/knowledge_center/templates/ss_decision_document.docx) 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 valued requirements), regardless of source selection process utilized.

### 4 DOCUMENTATION REQUIREMENTS

**4.1 Minimum Requirements**

4.1.15 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 official (permanent)contract file.

4.1.16 Evaluation worksheets and summaries shall be included in the official (permanent) contract file.

**4.2 Electronic Source Selection**

EZ Source is the standard Air Force documentation tool that shall be used for all unclassified competitive acquisitions valued at $100M or more (unless waived by the CAA), or when an acquisition has been designated a high visibility program by a PEO or Center/Complex/Wing Commander. EZ Source may be used for acquisitions valued at less than $100M. In order to ensure proper support is available to the team, PCOs must use the [SharePoint EZ Scheduler](https://cs2.eis.af.mil/sites/10148/afcc/records_contract/EZ/Lists/EZ_Scheduler/MyItems.aspx) to request the use of EZ Source and input information relative to their acquisition not later than 60 days prior to the projected RFP release.

**4.3 Additional Guidance and Tailorable Templates**

● [Protection, Maintenance, Retention, and Disposition of Source Selection Data](https://cs2.eis.af.mil/sites/10059/afcc/knowledge_center/Documents/AFFARS_Library/5315/ss_documentation_guidance.docx)

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

● [Abstract of Proposals/Quotations (Negotiated Procurement)](https://cs2.eis.af.mil/sites/10059/afcc/knowledge_center/templates/abstract_of_proposals_and_quotations.pdf)

● **Source Selection Documentation Templates**

○ [Delegation of Source Selection Authority (SSA)](https://cs2.eis.af.mil/sites/10059/afcc/knowledge_center/templates/memo_SSA_Delegation.docx)   
○ [Past Performance Questionnaire (Sample 1)](https://cs2.eis.af.mil/sites/10059/afcc/knowledge_center/templates/past_perf_quest_sample_1.docx)   
○ [Past Performance Questionnaire (Sample 2)](https://cs2.eis.af.mil/sites/10059/afcc/knowledge_center/templates/past_perf_quest_sample_2.docx)   
○ [Past Performance Questionnaire (Sample 3)](https://cs2.eis.af.mil/sites/10059/afcc/knowledge_center/templates/past_perf_quest_sample_3.docx)   
○ [Section L Attachment - Past Performance Information](https://cs2.eis.af.mil/sites/10059/afcc/knowledge_center/templates/section_L_past_performance_information.docx)

○ [Solicitation Cross Reference Matrix](https://cs2.eis.af.mil/sites/10059/afcc/knowledge_center/templates/solicitation_cross_reference_matrix.docx)   
○ [Source Selection File Checklist](https://cs2.eis.af.mil/sites/10059/afcc/knowledge_center/templates/ss_file_checklist.docx)  
○ [Source Selection Plan](https://cs2.eis.af.mil/sites/10059/afcc/knowledge_center/templates/ss_plan.docx)  
○ [Subcontractor Consent Letter](https://cs2.eis.af.mil/sites/10059/afcc/knowledge_center/templates/subcontractor_consent_letter.docx)   
○ [Verification of Correspondence Going to Offeror](https://cs2.eis.af.mil/sites/10059/afcc/knowledge_center/templates/verification_of_correspondence_to_offeror.xls)

**●** **Source Selection Evaluation Board (SSEB) Templates**

○ [Rating Team Worksheet (Methodology 1)](https://cs2.eis.af.mil/sites/10059/afcc/knowledge_center/templates/rating_team_worksheet_method_1.docx)  
○ [Rating Team Worksheet (Methodology 2)](https://cs2.eis.af.mil/sites/10059/afcc/knowledge_center/templates/rating_team_worksheet_method_2.docx)  
○ [Rating Team Worksheet (PPT)](https://cs2.eis.af.mil/sites/10059/afcc/knowledge_center/templates/PPT_rating_team_worksheet.docx)

○ [Tradeoff Technical Evaluator Template](https://cs2.eis.af.mil/sites/10148/afcc/records_contract/EZ/EZ_Docs/Templates/Tradeoff_Tech_Evaluator_Template.docx)

○ [LPTA Technical Evaluator Template](https://cs2.eis.af.mil/sites/10148/afcc/records_contract/EZ/EZ_Docs/Templates/LPTA_Tech_Evaluator_Template.docx)

○ [Tradeoff Subfactor Chief Template](https://cs2.eis.af.mil/sites/10148/afcc/records_contract/EZ/EZ_Docs/Templates/Tradeoff_SubFactor_Chief_Template.docx)

○ [LPTA Subfactor Chief Template](https://cs2.eis.af.mil/sites/10148/afcc/records_contract/EZ/EZ_Docs/Templates/LPTA_SubFactor_Chief_Template.docx)

○ [Evaluation Notice (EN)](https://cs2.eis.af.mil/sites/10148/AFCC/records_contract/EZ/EZ_Docs/Templates/EN_Template.docx)

**○ Past Performance Evaluation Team Documents**

○ [Relevancy Template](https://cs2.eis.af.mil/sites/10148/AFCC/records_contract/EZ/EZ_Docs/Templates/Relevancy_Template.docx)

○ [Tradeoff Performance Quality Template](https://cs2.eis.af.mil/sites/10148/afcc/records_contract/EZ/EZ_Docs/Templates/Tradeoff_PerformanceQuality_Template.docx)

○ [LPTA Performance Quality Template](https://cs2.eis.af.mil/sites/10148/AFCC/records_contract/EZ/EZ_Docs/Templates/LPTA_PerformanceQuality_Template.docx)

○ [Business Relationship Template](https://cs2.eis.af.mil/sites/10148/AFCC/records_contract/EZ/EZ_Docs/Templates/BusinessRelationship_Template.docx)

○ [Past Performance Information Template](https://cs2.eis.af.mil/sites/10148/afcc/records_contract/EZ/EZ_Docs/Templates/PPI_Template.docx)

○ [Tradeoff Past Performance Confidence Assessment Template](https://cs2.eis.af.mil/sites/10148/afcc/records_contract/EZ/EZ_Docs/Templates/Tradeoff_PastPerformanceConfidence_Template.docx)

○ [LPTA Past Performance Evaluation Template](https://cs2.eis.af.mil/sites/10148/AFCC/records_contract/EZ/EZ_Docs/Templates/LPTA_PastPerformanceEvaluation_Template.docx)

○ [Performance Confidence Rating Evaluation](https://cs2.eis.af.mil/sites/10059/afcc/knowledge_center/templates/perf_conf_rating_eval.docx)   
**○ Cost/Price Evaluation Team Document**

○ [Cost/Price Template](https://cs2.eis.af.mil/sites/10148/AFCC/records_contract/EZ/EZ_Docs/Templates/CostPrice_Template.docx)

See [SMC PGI 5315.3 (4.3)](pgi_5315.docx/).

### 5 DEFINITIONS *(No AF text)*

### 6 MANDATORY AIR FORCE SOURCE SELECTION TRAINING

**6.1 Purpose**

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

**6.2 Responsibilities of Senior Contracting Officials (SCO)**

SCOs 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](mailto:SAF.AQ.MLA.DF.SAF-AQCP.FIELD.SUPPORT@us.af.mil). The lists should be updated as necessary, but at a minimum shall be updated annually. See the [*Designation of Source Selection Training Manager/Trainers*](https://cs2.eis.af.mil/sites/10059/afcc/knowledge_center/templates/designation_of_ss_trng_mgrs_and_trainers.pdf) 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](mailto:SAF.AQ.MLA.DF.SAF-AQCP.FIELD.SUPPORT@us.af.mil). 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 two (2) year period must be recertified by SAF/AQC. Recertification requires that the SCO 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](https://cs2.eis.af.mil/sites/10059/afcc/knowledge_center/source_selection_training/SSA_SS_Training_Charts.pptx) and [SSAC](https://cs2.eis.af.mil/sites/10059/afcc/knowledge_center/source_selection_training/SSAC_SS_Training_Charts.pptx).

● **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.

SAF/AQC develops and maintains source selection training modules to assist Source Selection Trainers. Trainers are encouraged to tailor the modules, as needed, to meet the unique elements of the instant acquisition.

The **Ethics, Procurement Integrity, and Conflicts of Interest** topic should be presented by the local legal advisor. Links to Ethics training material are included in both Phase I and Phase II source selection training materials. The use of locally-developed Ethics training by local legal advisors is encouraged. 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](http://icatalog.dau.mil/onlinecatalog/tabnavcl.aspx) on source selection and related topics. Some suggested DAU courses include the following:

[CLC 004](http://icatalog.dau.mil/onlinecatalog/courses.aspx?crs_id=283) - *Market Research*

[CLC 007](http://icatalog.dau.mil/onlinecatalog/courses.aspx?crs_id=230) - *Contract Source Selection*

[CLC 028](http://icatalog.dau.mil/onlinecatalog/courses.aspx?crs_id=247) - *Past Performance Information*

[CLC 132](http://icatalog.dau.mil/onlinecatalog/courses.aspx?crs_id=423) - *Organizational Conflicts of Interest*

[CLM 049](http://icatalog.dau.mil/onlinecatalog/courses.aspx?crs_id=1689) - *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*](https://cs2.eis.af.mil/sites/10059/afcc/aqcinternal/aqcp/ss_train_the_trainers/Forms/AllItems.aspx) website. Additional training materials for teams are available in the [AFFARS Library, Part 5315](https://cs2.eis.af.mil/sites/10059/afcc/knowledge_center/Pages/5315-main.aspx).

**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](https://cs2.eis.af.mil/sites/10059/afcc/knowledge_center/templates/Certificate_Phase_I_Training.pdf) and [Phase II](https://cs2.eis.af.mil/sites/10059/afcc/knowledge_center/templates/Certificate_Phase_II_Training.pdf) to the personnel they train.

**6.7 Source Selection Training Survey**.

Following training, personnel are encouraged to complete the [*Source Selection Training Survey*](https://cs2.eis.af.mil/sites/10059/afcc/knowledge_center/Lists/source_selection_training_survey/overview.aspx) (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).**

Designated Source Selection trainers may grant CLPs to source selection attendees. As a general rule, CLPs must be given based on the length and intensity of the training provided. Trainers may 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)*