

Source One Spares - NotebookLM Optimized Opportunity Assessment Framework

CRITICAL BASELINE: SOS CAPABILITIES & CONSTRAINTS

What SOS CAN Provide:

- FAA-certified refurbished/overhauled parts
- Surplus and used serviceable material (USM)
- Common commercial items
- COTS (Commercial Off-The-Shelf) parts
- New aftermarket parts (non-OEM)
- Parts with FAA Form 8130-3 certification
- Rotable components
- JIT (Just-In-Time) delivery
- 24/7 AOG support

What SOS CANNOT Provide:

- Military Source Approval Required (SAR) items
- Manufacturing without government-owned technical data
- OEM-only restricted parts (unless via approved channels)
- Items requiring security clearances
- Brand new OEM parts (in most cases)
- Items with restricted/proprietary technical data

SOS Certifications Held:

- ASA Accreditation (FAA AC 00-56)
- ISO 9001:2015
- AS9120B
- FAA-certified repair station network access

SECTION 1: IMMEDIATE DISQUALIFIERS (Hard Stop Analysis)

CRITICAL: These hard stops OVERRIDE ALL positive indicators. No exceptions.

1.1 Source Approval Requirements (SAR)

Search Terms: "source approval", "approved source", "qualified products list", "QPL", "QML", "source qualification", "approved manufacturer", "military specification"

Decision Logic:

- IF contains "source approval required" AND military specification → **STOP: NO-GO**
- IF contains "FAA source approval" → **CONTINUE** (SOS can meet)
- IF no source approval mentioned → **CONTINUE**

BD Strategy for Military SAR: When military SAR is present (always NO-GO), but parts have civilian equivalents:

- Track as "NO-GO - SAR Present (CO Contact Made)"
- Send message about future refurbished acceptability
- Only worth contacting if civilian parts availability exists

1.2 Sole Source Justification

Search Terms: "sole source", "only one responsible source", "brand name or equal", "single source", "proprietary", "exclusive", "intent to award"

Decision Logic:

- IF "sole source" to named vendor (not SOS) → **STOP: NO-GO**
- IF "brand name or equal" AND no SAR → **CONTINUE** (opportunity exists)
- IF "brand name or equal" AND SAR present → **STOP: NO-GO** (SAR wins)
- IF "intent to sole source" → **CONTINUE** (NOT a disqualifier - can be challenged)

1.3 Technical Data Restrictions

Search Terms: "technical data package", "TDP", "drawings", "proprietary data", "data rights", "government furnished", "GFI", "GFP", "technical data not available", "OEM owns data", "proprietary technical data"

Decision Logic:

- IF "drawings not available" → **STOP: NO-GO**
- IF "OEM owns technical data" → **STOP: NO-GO**
- IF "proprietary technical data" → **STOP: NO-GO**

- IF "government owns technical data" → **CONTINUE**
- IF "technical data available upon award" → **CONTINUE**
- IF repair/overhaul AND "FAA standards apply" → **CONTINUE**

1.4 Security Clearance Requirements

Search Terms: "security clearance", "secret", "top secret", "classified", "security requirements", "personnel clearance", "facility clearance"

Decision Logic:

- IF requires any security clearance → **STOP: NO-GO**
- IF "unclassified" explicitly stated → **CONTINUE**

1.5 New Parts Only Restriction

Search Terms: "factory new only", "new manufacture only", "no refurbished", "no rebuilt", "no overhauled", "no used"

Decision Logic:

- IF "factory new only" or equivalent → **STOP: NO-GO**
- IF "new or refurbished" → **CONTINUE**

SECTION 2: OPPORTUNITY CLASSIFICATION

2.1 Acquisition Type Identification

Search Terms: "manufacture", "repair", "overhaul", "refurbish", "spare parts", "rotatable", "consumable", "modification", "sustainment", "contractor logistics support"

Classification Logic:

- Contains "spare parts" + "delivery" → **Spares Supply** ✓
- Contains "repair" OR "overhaul" → **Managed Repair** ✓
- Contains "manufacture" + "government owns data" → **Manufacturing** (conditional)
- Contains "manufacture" WITHOUT data rights → **NO-GO**
- Contains "CLS" or "contractor logistics" → **Evaluate complexity**

2.2 Commercial vs Military Platform

Search Terms:

- Commercial indicators: "FAR Part 12", "commercial item", "FAA certified", "14 CFR", "AC 00-56"
- Military indicators: "MIL-SPEC", "military standard", "MILSTD", "defense", "weapon system"
- Platform names: "Boeing 737", "KC-46", "C-130", "P-8", etc.
- Engine models: "CFM56", "PW4000", "CF6", "PT6", etc.

Decision Logic:

- IF FAR Part 12 mentioned → **STRONG POSITIVE** (commercial procedures)
- IF military platform WITH commercial equivalent → **EVALUATE** (may be viable)
- IF pure military platform with MIL-SPECs → **CAUTION** (check other factors)
- IF commercial engine model → **POSITIVE** (wide parts availability)
- IF fighter engine (F100, F119, etc.) → **NEGATIVE** (military only)

SECTION 3: TECHNICAL ACCEPTABILITY MATRIX

3.1 Parts Acceptability

Search Terms: "new", "refurbished", "overhauled", "repaired", "surplus", "excess", "used", "serviceable", "condition code", "factory new"

Scoring Matrix:

Requirement	SOS Capability	Score
"refurbished acceptable"	YES	+3
"surplus acceptable"	YES	+3
"used serviceable"	YES	+3
"overhauled components"	YES	+3
"new or refurbished"	YES	+2
"factory new only"	LIMITED	-3
"OEM new required"	NO	-5

3.2 Traceability Requirements

Search Terms: "traceability", "pedigree", "documentation", "8130-3", "certificate", "OEM trace", "chain of custody", "authorized distributor", "OEM distributor", "authorized dealer", "factory authorized"

Decision Logic:

- IF "FAA Form 8130-3" → **YES** (SOS provides)

- IF "full traceability required" + FAA → **YES**
- IF "OEM direct traceability only" → **NO-GO + CO Contact**
- IF "authorized distributor required" → **NO-GO + CO Contact**
- IF "OEM distributor only" → **NO-GO + CO Contact**
- IF "factory authorized dealer" → **NO-GO + CO Contact**
- IF "military traceability" + no commercial equivalent → **NO-GO**

BD Strategy for OEM Distribution Restrictions: When OEM-only distribution requirements present (normally NO-GO):

- Track as "NO-GO - OEM Distributor Required (CO Contact Made)"
- Message: "We provide these commercial parts with full FAA 8130-3 traceability from aftermarket sources. If non-OEM sourcing becomes acceptable, we maintain extensive inventory."
- Same seed-planting strategy as SAR restrictions

3.3 Certification Requirements

Search Terms: "ISO", "AS9100", "AS9120", "NADCAP", "FAA", "repair station", "14 CFR Part 145"

Capability Check:

- ISO 9001 → **SOS HAS** ✓
- AS9120B → **SOS HAS** ✓
- FAA certifications → **SOS HAS** ✓
- AS9100 (manufacturing) → **SOS LACKS** ✗
- NADCAP → **SOS LACKS** ✗

SECTION 4: DELIVERY & LOGISTICS EVALUATION

4.1 Delivery Timeline Analysis

Search Terms: "delivery", "ARO", "after receipt of order", "lead time", "urgent", "AOG", "expedited"

Viability Scale:

- 30+ days ARO → **EXCELLENT** (standard capability)
- 15-30 days → **GOOD** (achievable)
- 7-14 days → **EVALUATE** (depends on parts)
- <7 days → **CHALLENGING** (only for in-stock items)

- "AOG support" → **STRENGTH** (24/7 capability)

4.2 Geographic & Compliance Factors

Search Terms: "OCONUS", "overseas", "export", "ITAR", "import", "customs", "international"

Assessment Logic:

- Domestic US only → **OPTIMAL**
 - ITAR compliance required → **CAPABLE** (with planning)
 - Foreign military sales → **EVALUATE** case-by-case
 - Restricted access areas → **CHECK** escort provisions
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SECTION 5: STRATEGIC OPPORTUNITY SCORING

5.1 Contract Value Indicators

Search Terms: "estimated value", "ceiling", "IDIQ", "maximum", "funded", "option years"

Value Tiers:

- Under \$100K → Quick win potential
- \$100K - \$1M → Standard opportunity
- \$1M - \$10M → Strategic priority
- Over \$10M → Executive review required

5.2 Competition Indicators

Search Terms: "incumbent", "previous awardee", "historical", "currently performed by"

Competition Assessment:

- No incumbent mentioned → **OPEN FIELD** (+2)
- Incumbent identified + recompete → **COMPETITIVE** (0)
- Strong incumbent language → **ENTRENCHED** (-2)

5.3 Small Business Preferences

Search Terms: "small business", "set-aside", "8(a)", "SDVOSB", "WOSB", "HUBZone", "socioeconomic"

SOS Status: Qualifies as Small Business under most NAICS codes

Preference Hierarchy:

- Total small business set-aside → **PREFERRED** ✓
 - Partial set-aside → **OPPORTUNITY** ✓
 - No set-aside + large business → **TEAM POTENTIAL**
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SECTION 7: DISAMBIGUATION RULES - HANDLING CONFLICTS & AMBIGUITY

7.1 Hierarchy of Decision Making

When conflicting indicators exist, this hierarchy **ALWAYS** applies:

1. **Hard Stops Win** - Any hard stop = NO-GO regardless of positive indicators
 - Example: "FAR Part 12 commercial item" + "source approval required" = **NO-GO**
 - Example: "Refurbished acceptable" + "military SAR" = **NO-GO**
2. **Worst Platform Rules** - In mixed platform solicitations
 - "C-130 and Boeing 737 parts" = Assess as **NO-GO** (C-130 drives decision)
 - Each platform assessed separately, worst case governs overall
3. **Treat Ambiguity as Restrictive**
 - "May require source approval" = Assume **YES, SAR required**
 - "Could include military items" = Assume **YES, military items**
 - "Potentially restricted data" = Assume **YES, restricted**

7.2 IDIQ Assessment Rules

Base vs Ceiling Evaluation:

- Base order <\$100K but ceiling >\$10M = **Still evaluate as strategic**
- Focus on ceiling value for GO/NO-GO decision
- Small base orders often just establish contract vehicle

7.3 "Or Equal" Language

Only positive if no other restrictions:

- "Brand name or equal" + No SAR = **Opportunity**
- "Brand name or equal" + SAR present = **NO-GO** (SAR wins)
- "OEM or equal" + OEM distributor required = **NO-GO**

7.4 Contractor Logistics Support (CLS)

CLS typically means more than just parts:

- Usually includes on-site support = Evaluate capability
- Often requires inventory management = Consider resources
- May need technical reps = Check personnel requirements
- Default assessment: **NEEDS FURTHER ANALYSIS**

7.5 Mixed Requirements

When some items allow refurb, others require new:

- "Refurbished acceptable except flight critical" = **NEEDS ANALYSIS**
- List which items SOS can provide vs cannot
- May pursue for partial award

7.6 Federal vs Commercial Entities

Procurement rules follow the contracting agency:

- Federal agency buying civilian aircraft = May still use federal rules
 - State/local buying military aircraft = Usually civilian rules
 - When unclear = Check solicitation for FAR vs state procurement code
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SECTION 8: SPECIAL OPPORTUNITY CATEGORIES

6.1 SLED Market (State/Local/Education) Opportunities

Search Terms: "state", "county", "city", "municipal", "school district", "university", "state agency"

SLED Special Rules:

- **ALL civilian aircraft parts → VIABLE** (no military restrictions)
- Less stringent source approval requirements
- Often more flexible on refurbished/surplus
- Shorter procurement cycles
- Lower competition from large primes

6.2 Dual-Use Parts Logic

Search Terms: "engine", "avionics", "hydraulic", "landing gear", "fuel system", "electrical"

Decision Framework:

- IF part used on BOTH military AND civilian variants → **PURSUE**
- IF engine component (CFM56, PW4000, etc.) → **LIKELY DUAL-USE**
- IF standard avionics/electrical → **CHECK CIVILIAN APPLICATIONS**
- IF structural component + commercial equivalent exists → **VIABLE**

Examples of Dual-Use Winners:

- 737 parts used on P-8 Poseidon
 - 767 parts used on KC-46 Pegasus
 - Common engines across military/civilian fleets
 - Standard hydraulic/pneumatic components
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SECTION 9: TEAMING & PARTNERSHIP DECISION MATRIX

7.1 Prime vs Subcontractor Decision Tree

When to Pursue as PRIME:

- Total contract value <\$5M
- SOS can fulfill 75%+ of requirements
- No complex integration required
- Standard commercial items/parts
- Direct relationship with end user desired

When to Pursue as SUBCONTRACTOR:

- Large IDIQ or enterprise contracts
- Complex systems integration required
- Prime has complementary capabilities
- Risk mitigation needed
- Past performance gaps

When to PARTNER/TEAM:

- Geographic coverage needed
- Specialized certifications required (AS9100, NADCAP)
- Volume exceeds SOS capacity

- Strategic market entry

7.2 Identifying Potential Primes

Search Terms: "incumbent", "current contractor", "previous awardee", "awarded to"

Partner Identification Strategy:

1. Check previous award history in solicitation
 2. Search SAM.gov for recent similar awards
 3. Target primes who won but may need suppliers:
 - Large defense contractors for parts supply
 - MRO providers for surge capacity
 - Systems integrators for components
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SECTION 8: PAST PERFORMANCE & QUALIFICATIONS

8.1 Past Performance Requirements Analysis

Search Terms: "past performance", "relevant experience", "similar contracts", "CPARS", "references"

SOS Past Performance Strategy:

- **Direct Experience:** KC-46 contracts (\$2.37B) for similar size/scope
- **Relevant Experience:** 27+ years aviation aftermarket
- **Subcontractor Experience:** Counts if properly documented
- **Commercial Experience:** Often acceptable for government work

When Past Performance May Block:

- Requires 3+ identical contracts → **EVALUATE CAREFULLY**
- Specific agency experience required → **CHECK SUBS**
- Classified contract experience → **NO-GO**

8.2 Financial Capability Indicators

Search Terms: "bonding", "financial capability", "payment bond", "performance bond", "line of credit"

Thresholds:

- Bonding <\$500K → **MANAGEABLE**
- Bonding \$500K-\$2M → **EVALUATE WITH CFO**

- Bonding >\$2M → **STRATEGIC DECISION**
 - No bonding mentioned → **POSITIVE INDICATOR**
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SECTION 9: AIRCRAFT PLATFORM QUICK REFERENCE

9.1 Military-to-Commercial Equivalents

Military Platform	Commercial Equivalent	Parts Commonality
KC-46 Pegasus	Boeing 767	~85% common
P-8 Poseidon	Boeing 737	~80% common
C-40 Clipper	Boeing 737	~90% common
C-32	Boeing 757	~85% common
VC-25 (Air Force One)	Boeing 747	~75% common
E-3 Sentry (AWACS)	Boeing 707	~70% common
E-6 Mercury	Boeing 707	~70% common
C-12 Huron	Beechcraft King Air	~95% common

9.2 Engine Cross-Reference

Engine Model	Military Applications	Commercial Applications
CFM56	KC-135R, E-3, E-6	Boeing 737, A320
F117 (CF6)	C-5M Super Galaxy	Boeing 767, 747
PW4000	KC-46, C-17	Boeing 777, A330
T56/501D	C-130, P-3	L-100 (civilian C-130)

SECTION 12: DECISION LOGIC FLOWCHART

START ASSESSMENT

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[Check Section 1: ALL Hard Stops]

- └─ ANY hard stop found? → STOP: NO-GO
- └─ If parts available in civilian market → CO CONTACT
- └─ All clear? → CONTINUE

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[Apply Disambiguation Rules if Conflicts]

- └─ Conflicting signals? → HARD STOPS WIN
- └─ Continue

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[Is this SLED opportunity?]

- └─ YES → ENHANCED VIABILITY (skip military restrictions)
- └─ NO → CONTINUE STANDARD PATH

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[Check Dual-Use Parts?]

- └─ YES → BONUS POINTS (+5)
- └─ NO → CONTINUE

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[Score Section 3: Technical Fit]

- └─ Score < -5? → STOP: TECHNICAL MISMATCH
- └─ Score ≥ 0? → CONTINUE

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[Evaluate IDIQ Ceiling vs Base]

- └─ High ceiling value? → WEIGHT ACCORDINGLY
- └─ Continue

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[Calculate Composite Score]

- └─ Apply thresholds:
 - └─ 80%+ → PURSUE AGGRESSIVELY
 - └─ 60-79% → PURSUE WITH CAUTION
 - └─ 40-59% → EVALUATE PARTNERSHIP
 - └─ <40% → DECLINE OR MONITOR

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[If 40-79%: Check Teaming Options]

- └─ Strong prime available? → PURSUE AS SUB
- └─ Gaps fillable by partner? → CREATE TEAM
- └─ No viable options? → DECLINE

SECTION 13: NOTEBOOKLM EXTRACTION PRIORITIES

Primary Extraction Targets:

1. **Announcement Number** - First page, top section
2. **NAICS/PSC Codes** - Usually in overview or Section B
3. **Set-aside Status** - Block 10 of SF1449 or synopsis
4. **Technical Requirements** - Section C (Statement of Work)
5. **Evaluation Criteria** - Section M
6. **Key Dates** - Section L or cover page

Critical Phrases to Flag:

- ✗ "Source approval required"
- ✗ "Drawings not available"
- ✗ "Factory new only"
- ✗ "Security clearance required"
- ✓ "Commercial item acquisition"
- ✓ "FAR Part 12"
- ✓ "Refurbished acceptable"
- ✓ "Or equal"

Inference Rules for Ambiguous Language:

1. **Default to restrictive interpretation** - "May require" = "Does require"
2. If "spare parts" + military aircraft → Check for hard stops first
3. If FAA mentioned + military platform → Still check SAR requirements
4. If "common use item" → Positive ONLY if no SAR
5. If export mentioned + no ITAR → Flag for clarification
6. **Never assume** - If unclear, mark NEEDS FURTHER ANALYSIS
7. **Hard stops override everything** - No positive indicator matters if hard stop present

FINAL ASSESSMENT OUTPUT TEMPLATE

Opportunity: [Announcement Number] **Recommendation:** GO / NO-GO / NEEDS ANALYSIS / PURSUE AS SUB **Confidence Level:** HIGH / MEDIUM / LOW **Pursuit Strategy:** PRIME / SUBCONTRACTOR / TEAM LEAD / TEAM MEMBER

Rationale:

- Hard Stops Cleared: YES/NO (list any failures)

- Technical Alignment: [Score]
- Commercial Indicators: [Count]
- SLED Opportunity: YES/NO
- Dual-Use Parts: YES/NO
- Risk Factors: [List]
- Teaming Options: [If applicable]
- Next Actions: [Specific steps]

One-Line Justification: [For pipeline entry]

Quick Reference Flags:

-  FAR Part 12 Commercial
-  Refurbished Acceptable
-  Dual-Use Parts
-  SLED Market
-  Intent to Award (can challenge)
-  Teaming Opportunity
-  Military SAR Required
-  Security Clearance Needed