START WITH THE END IN MIND — WORK BACKWARDS!

1. Let's streamline the evaluation and selection documentation while providing a quality product.

2. Before you release your solicitation, develop a shared understanding across the team – what matters, and how will those things be evaluated? Ensure your solicitation and evaluation plan provides the flexibility to evaluate what matters! Then, follow the plan.

3. Focus on people collaboration over paper preparation. Follow the principle of "work together daily" – evaluation is a team-based effort.

4. Sometimes it's also good to have acquisition reviewers (policy, level above) involved at critical decision points to avoid surprises downstream.

5. Document decisions, not deliberations. Evaluate, arrive at consensus, and *then* document.

6. Focus on the discriminators between offerors – document those discriminators.

7. Use **bullets** to avoid complexity of long, narrative documentation. Note the discriminator (strong point or weak point) and perhaps state why that point matters to the Government.

8. See *Working Backwards* in this workbook's GAO Guide *(Note: This will be a real change for many of us).*
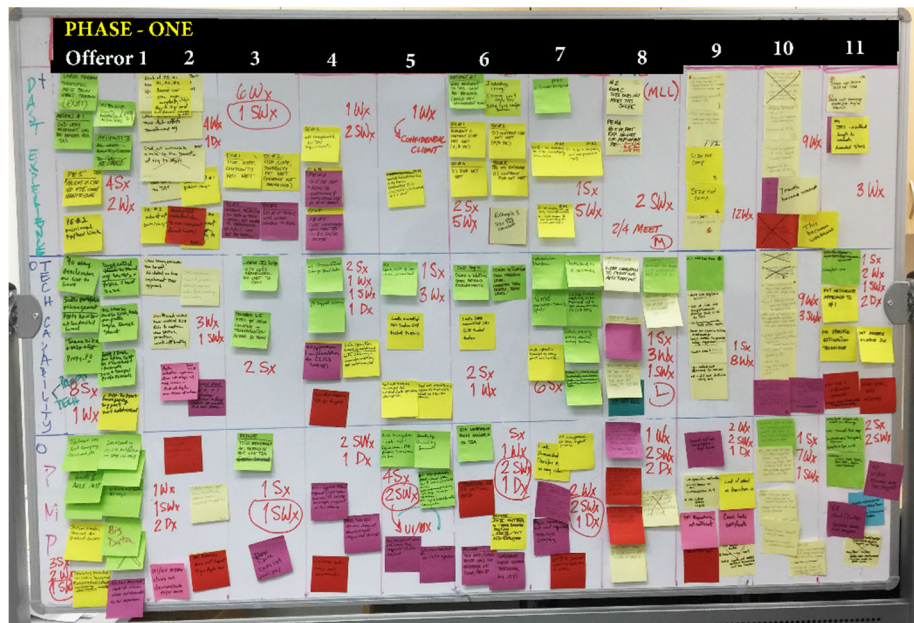
A possible approach. This was for a complex acquisition, with offerors across the top and evaluation factors down the side. Green sticky notes were positive aspects, yellow notes were "maybe" aspects, purple notes were problematic aspects, and red notes were failings.

Written Report? Instead of a detailed written evaluation report, consider having the evaluation team chair and contracting officer brief the selecting official in person, using visual displays (maybe PowerPoint slides, or maybe a white board such as in the photo above).

Recommended Text for an Evaluation Plan—

- The documentation for each proposal shall include the ratings and rationale for the ratings for each evaluation factor. Brief bullets are preferred over narrative essay paragraphs, with each bullet referencing a discrete, identifiable finding regarding the proposal and reasonably relating to the factor.

- The evaluation team's documentation shall be assembled into an evaluation report and/or briefing, as the selecting official may request.

    Note: A written evaluation plan is not required for an order or BPA against a schedule contract (FAR subpart 8.4), an order against a multiple-award IDIQ contract (FAR § 16.505), or an acquisition using Simplified Acquisition Procedures (FAR part 13).

Real consensus evaluation text for an offer with two technical factors. Note the use of brief bullet statements. The component, program title, offeror name, and sensitive information have been redacted.

▮▮▮▮▮ – Consensus Evaluation Worksheet	Offeror: ▮▮▮▮

Factor X - Experience	**Factor Y - Staffing Approach**

Factor X - Experience

HIGH CONFIDENCE

Increases Confidence—
- Long history of successes related to corporate experience itemized in presentation—focused in Polygraph and managerial/instructor experience
- Have an APA certified school training school and one of the leading polygraph experts in the field ▮▮▮ works for ▮▮▮▮
- NCCA inspects ▮▮▮ and they haven't had a single finding—this is very difficult to achieve
- Have taught classes for same requirements that ▮▮▮ has under this RFP
- Have ▮ examiners actively conducting federal exams for ▮▮; they generally said that they have ▮ examiners working in support of federal contracts.
- States- they are currently operating in ▮ locations/ ▮ states- both ▮▮ and ▮▮ were dispersed exam models which meets ▮▮'s nationwide RFP requirements.
- Has no corporate history of exams not being accepted or paid for by the Government
- Have implemented an extra process step of ▮▮▮ scheduler contacting applicants ▮ hours in advance to reduce no-show rate—proactive and not ▮▮-required

Decreases Confidence—
- Two examples discussed under prior experience (▮▮ and ▮▮) were not considered because the past performance contact information was not submitted and they could not be found in PPIRS to verify if they were recent or what the performance rating was.

Factor Y - Staffing Approach

HIGH CONFIDENCE

Increases Confidence—
- Personnel being proposed are extensively trained
- Provide pre-training to help ensure success with ▮▮ training
- Possess ▮ Lafayette Polygraph Instruments
- Direct Lafayette equipment relationship, which provides the required equipment/expedited replacement of parts/ support to perform the work.
- Demonstrated a strong understanding of the Federal Recruitment Pool- shows they really know the pool of recruitable examiners and ways to reach out and hire them. They forecast how many are available each year (about ▮ each year)
- Extensive monitoring of examiners via audio reviews/cross-check.
- Incentives/recruitment bonuses to retain examiners
- Lift and Shift allows them to move resources and retain examiners to keep up with levels of work so there is always available work. This reduces risk of examiners leaving.
- Examiners on other federal contracts are not at capacity so they could be lifted and shifted to ▮▮. They can take on more work in support of our contract - mitigates risks of Lift and Shift to ▮▮.
- Continuously hiring and adequate resources already on staff to meet ▮▮ requirements.
- Have already identified program management for ▮▮ requirement and articulated their plan of who would be appointed to manage ▮▮'s requirement. All have extensive Polygraph examination and management experience.

Decreases Confidence—
- None noted

Real page from a real consensus technical evaluation report for an oral presentation. The bullets were written by the note-taker during the on-the-spot consensus evaluation, and agreed to while still in hand-written form. These bullets were protested as too brief and too vague, but were found unobjectionable by the GAO. See *Bullets in Technical Evaluation* in this workbook's GAO Guide.

U.S. Citizenship and Immigration Services

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CONSENSUS EVALUATION

offeror name / redacted

Based on its oral presentation, the Government has **LOW CONFIDENCE** that this offering contractor understands the requirement, proposes a sound approach, and will be successful in performing the work.

- Good focus on open communication

- Scrumban explanation was not persuasive, maybe even wrong in parts, and did not give confidence

- A good example of openness: client going into estimating session

- This contractor won't lead us, push forward

- Presentation did not provide a complete understanding or feeling of confidence

- Automated testing mentioned as part of DevOps as different from Agile, causing concern

- A number of key concepts were not defined, or defined incorrectly

- The presentation did not include discussion about prioritization and business values

- Focus on attacking bottlenecks is an important continuous improvement method, but is not a substitute for portfolio management

This is a REAL page from a REAL evaluation report! The offeror protested these brief bullets as inadequate, but the GAO disagreed. See *Bullets in Technical Evaluation* in this workbook's GAO Guide.

Source Selection Information – See FAR 2.101 and 3.104