

SOURCE SELECTION INFORMATION – SEE FAR 3.104

TECHNICAL EVALUATION GUIDELINES (TEG) TEMPLATE

[Use this template when drafting Attachment (2) to the Technical Evaluation Request - The Contracting Officer shall customize this document to address the particular circumstances of the procurement in question, especially the applicable solicitation instructions/criteria – NOTE: Sections VI and VII are provided as SAMPLES only. Ensure each page of the TEG is marked “SOURCE SELECTION INFORMATION-See FAR 3.104”.]

Attachment (2) to
Technical Evaluation Request dated _____
Cover Page

**TECHNICAL EVALUATION GUIDELINES (TEG)
FOR SOLICITATION NO. _____
(Receipt of Guidelines by Technical Evaluation Team Members)**

By my signature¹ below, I acknowledge my review and understanding of the (*insert number of pages*) page guideline contained in the TE Guide provided for the solicitation identified above.

(Insert Name and Office Code of Chairperson) (Date)
Technical Evaluation Team Member No. 1

(Insert Name and Office Code of Team Member) (Date)
Technical Evaluation Team Member No.2

(Insert Name and Office Code of Team Member) (Date)
Technical Evaluation Team Member No. 3

(Insert Name and Office Code of Team Member) (Date)
Technical Evaluation Team Member No. 4

(Insert Name and Office Code of Team Member) (Date)
Technical Evaluation Team Member No. 5

REMINDER: Each Team member is required to sign the cover page and the Team Chairperson shall forward the fully executed cover page to the Contracting Officer.

¹ Add or delete signature lines as appropriate based on the number of members identified for the Technical Evaluation Team assigned to the procurement.

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TECHNICAL EVALUATION GUIDELINES FOR SOLICITATION NO.

(PREPARED BY Insert Name of Contracting Officer, CONTRACTING OFFICER, Phone:- _____)

- I. **PURPOSE.** This document provides the technical evaluation criteria and the evaluation process to be used in evaluating the Solicitation cited above. This guideline is prepared in accordance with the solicitation instructions and evaluation criteria and consistent with the “Guidelines for Conducting the Evaluation of Solicited Technical Proposals” and the Federal Acquisition Regulations (FAR) Part 15

It is imperative that the proposals be evaluated strictly in accordance with the evaluation criteria set forth in the solicitation, following the evaluation and scoring methodology established in the Technical Evaluation Plan (determined by the Subject Matter Expert (SME) Functional managers) The solicitation announces to competitors the basis (cited in Section M), including the evaluation criteria and their relative importance, upon which the successful offeror(s) will be chosen. In order for the evaluation of proposals received in response to the solicitation to be legally valid, the evaluation must be conducted in accordance with the criteria stated in the solicitation.

- II. **BACKGROUND.** Describe the following under this heading:

- a) Product or services being acquired, including identification of the sponsoring agency and the Division or Branch responsible for initiating the Procurement Request (PR);
- b) Anticipated contract type, including applicable FAR citations; and
- c) Type of award anticipated, that is, single or multiple award.

- III. **TECHNICAL EVALUATION TEAM.**

- a) The Technical Evaluation Team (TET) identified for this solicitation is composed of the following individuals who collectively represent the technical requirements reflected in the solicitation’s Statement of Work or *Performance Work Statement*.

Name (*Identify the Chairperson*)

Office Code

- 1.
- 2.
- 3.
- 4.
- 5.

- b) All members assigned to this team are those that did not serve on the PWS and MEO team. The Chairperson is a (*cite Grade*). In addition, (Robert Knauer of the Office of Procurement) is assigned as the Contracting Officer for this solicitation to ensure the Technical Evaluation Team (TET) is made aware of and abides by the solicitation requirements and the applicable acquisition regulations.

- IV. **SECURITY.**

- a) **Proposal Security.** Because the proposals are source selection information, they shall be secured, when unattended, by the responsible TET member. Day to day proposal security shall be the responsibility of all TET members while in their possession.

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- b) **Rules of Conduct.** Proposal Evaluators and Source Selection personnel, other than the Contracting Officer, shall not discuss contractual matters such as the solicitation status, proposals (to include number or identity of offerors), discussions, and negotiations and award of contracts with prospective offerors or any other individuals who are not participants in the evaluation process. All information contained in proposals, or pertaining to the selection process, **is sensitive**. During the period between the receipt of proposals and notification by the Contracting Officer that an award has been made, all TET members shall ensure that:
1. Details of the acquisition activities are not made known, wholly or in part, to anyone other than authorized evaluators and source selection personnel. Make sure that the contents of a proposal are not discussed within earshot of personnel who have no official need to know the contents (including both Government and Contractor personnel).
 2. Any attempt by an offeror to alter a technical proposal already submitted shall be referred to the Contracting Officer.
 3. No information is provided to an individual offeror which may improve their position to the disadvantage of a competitor.
 4. There shall be no contact with any offeror unless approved by the Contracting Officer.
 5. The evaluation is not done in an area where outsiders, or Government personnel who do not require access to the proposal, move around and have opportunity to read any part of the proposal. If an outsider (includes On-site Contractor personnel) enters a private office where the proposal is being worked on, the proposal should be covered or placed in a drawer until the outsider leaves.
 6. All waste paper containing proposal or evaluation notes or data shall be disposed of in a separate waste file in the technical evaluation area. If a computer is used to prepare evaluation documentation, then every attempt should be made to save information on a disk rather than on the computer hard drive. All material shall be disposed of by the TET Chairperson at the conclusion of the source selection. Unclassified documents, records, and reports associated with the selection process shall be marked "SOURCE SELECTION SENSITIVE."
 7. No TET member may reproduce any part of a proposal without permission of the Contracting Officer. All copies of proposals must be returned to the Contracting Officer/Specialist upon notification of award for proper disposition. Proposals should be hand carried to the Contracting Officer/Specialist with all identifier information properly concealed.

- V. **TECHNICAL EVALUATION PROCESS MILESTONES.** The Contracting Officer has met with the TET Chairperson to address the technical evaluation criteria. The TET Chairperson has reviewed the solicitation and agrees with the technical evaluation criteria and their weights. Outlined below are the milestones and planned/actual due dates related to the Technical Evaluation process:

Milestones

Due Date

1. Determination of the Evaluation Criteria and their weights
2. Evaluation of each Offeror's Past Performance Information
3. Evaluation of each Offeror's Staffing Qualifications/Resumes
4. Evaluation of each Offeror's Oral/Hypothetical Presentations
5. Each TET member completes its evaluation score worksheets
6. TET summarizes its evaluation score worksheets
7. Based upon TET scoring, the TET ranks the Offerors
8. TET prepares & forwards to the CO the technical evaluation report
9. Debrief unsuccessful Offerors and/or Management

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- VI. TECHNICAL EVALUATION PROCESS.** *(The following **SAMPLE TEXT** is provided to assist you in drafting this section of the template. Customize this section to reflect the evaluation criteria and methodology specified in the solicitation in question, including the applicable technical evaluation plan.)*
- a) Prior to commencing the evaluation of the proposal(s), each TET member **must** read the solicitation especially **Sections C, L and M**. The proposal(s) shall be evaluated in **strict** accordance with the technical evaluation criteria addressed in **Sections L and M** of the solicitation.
 - b) **The following summarizes the process for evaluating each Offeror's technical proposal.**
 - 1) Each TET member shall read all proposals in their entirety and conduct his or her own independent assessment of each offeror's conformance with the evaluation criteria.
 - 2) Each TET member shall use the *evaluation scoring sheets* contained in the *evaluation plan* as developed by the functional manager and attached as appendices to these guidelines. The score sheets cannot introduce a completely new element or evaluation criteria. Evaluation criteria cannot be modified without a formal amendment to the Request for Proposals (RFP).
 - 3) Each TET member will read and assign a score for each element and/or sub-element contained in the evaluation score sheet, determine the adjectival rating for the proposal evaluation factor, multiply the numerical value assigned to that adjectival value by the weight assigned to that evaluation factor or sub-factor to arrive at its numerical value.
 - 4) In addition to the worksheets for each proposal, each TET member shall provide a detailed narrative which justifies the numerical scoring. Both strengths and weaknesses should be discussed and, naturally, the comments should be consistent with the numerical score and adjectival ratings.
 - 5) After all TET members have completed their technical evaluation, they normally: (i) meet as a group under the direction of the TET Chairperson to discuss individual evaluations; and (ii) arrive at a written consensus report which includes the technical ranking of proposals including specific technical comments for each proposal.
- VII. TECHNICAL EVALUATION CRITERIA.** *(The following **SAMPLE TEXT** is provided to assist you in drafting this section of the template. Please ensure you describe the evaluation criteria/instructions specified in the solicitation in question, including the applicable technical evaluation plan. **DO NOT COPY THE TEXT OF THIS SECTION IT IS ONLY A SAMPLE.**)*
- a) For this solicitation, each of the three technical evaluation criteria are given an equal weight, and the sub-criteria under each are also weighted equally. The three technical evaluation criteria are:
 - 1) Past Performance
 - 2) Staffing
 - 3) Technical Understanding and Management Approach (Oral Presentation)
 - b) The TET shall use a score ranging from 0 to 100 to represent the strengths, weaknesses, and probability of deficiency to be corrected, for each of the technical evaluation criteria. In addition, there is a corresponding narrative definition for the ratings of **Exceptional, Acceptable, Marginal and Unacceptable**. The definition of the ratings and their corresponding scores are listed below:

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Rating	Definition	Score
Exceptional	Exceeds evaluation standards; has high probability of satisfying the requirement; and has no significant weakness.	85-100
Acceptable	Meets evaluation standards; has good probability of satisfying the requirement; and any weakness can be readily corrected.	70-84
Marginal	Fails to meet evaluation standards; or has Very low probability of satisfying the requirement; or has significant deficiencies but is possibly correctable.	60-69
Unacceptable	Fails to meet a minimum requirement; and deficiency requires a major revision to the proposal to make it uncorrectable.	Below 60

- c) Each TET member shall use a standard worksheet designed to address each of the technical evaluation criterion being evaluated. Each TET member will include detailed narratives in the worksheet to specifically mention the strengths and deficiencies in support of the rating given. When each TET member has completed his/her evaluation, each TET member's scoring worksheet shall be integrated into a TET evaluation sheet to rank each Offeror.
- d) A complete set of worksheets is included in the Appendix, and directions on how to evaluate each of these technical evaluation criteria is further explained below.

1) **Past Performance.**

- (a) The Office of Procurement has issued with the solicitation, a standard "Past Performance Evaluation Form," with instructions for the Offeror to send out to four recent Federal agencies to complete and return for evaluation, for which it has performed work as a prime contractor. The five sub-factors included in the past performance report are:
- (1) Quality of Product/Service
 - (2) Cost Control
 - (3) Timeliness of Performance
 - (4) Business Relations
 - (5) Overall Satisfaction Rating
- (b) The rating criteria for the above sub-factors are provided in the instructions, and the numeric scores used in the past performance report are between 0 (Unsatisfactory) and 4 (Exceptional). If there is any reason to question the validity of the report, the TET will further check the offeror's references independent of the given reports.

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- (c) **Section L** of the solicitation requested that each Offeror select no more than four contracts that it considered most *recent and relevant* in demonstrating its ability to perform the proposed effort. After the TET determines the relevancy of the reports received, each TET member will enter the score for these contracts directly to the worksheet (Refer to the Appendix A worksheet). On the worksheet, an average score of these reports is automatically calculated, which is then converted to a weighted score carrying one-third of the total weight. If fewer than four (4) Past Performance Reports are received, a true average will be calculated based upon the number of reports received and no penalty shall be given for fewer than four (4) reports. Each TET member will determine whether each Offeror's Past Performance Reports submitted is relevant to the requirements of the SOW. For purposes of determining relevance evaluators shall consider: (1) relationship of past performance to the statement of work; (2) currency of past performance (i.e., ongoing or completed within past 3 years; and (3) value of past performance effort (i.e., contract value equal or over \$500K). The Contracting Officer will determine the final Past Performance rating based on this relevance determination.
- 2) **Staffing.**
- (a) The success of the contract depends heavily on the staffing qualification required by the solicitation's Statement of Work. This evaluation criteria covers the qualifications of the Senior Instructional Designer/Program Manager and Instructional Designer identified in the solicitation as key personnel, as well as the depth and breadth of the other technical staff. Section L of the solicitation requested that each Offeror submit, at a minimum, seven resumes. The experience and education requirements of each labor category is described in the solicitation's statement of work and the TET will use it as a baseline for evaluation of offers. The resumes will form the basis of this evaluation.
- (b) Each TET member will evaluate the resumes received from each Offeror and enter a score to the worksheet (Refer to the Appendix B worksheet). If an insufficient number of resumes are received, a zero score will be given to the missing portion of the resume. In the end, an averaged and weighted score per TET member as well as any narrative adjectival rating shall be provided.
- 3) **Technical Understanding & Management Approach (Oral Presentation).**
- (a) Instead of submitting lengthy written material for evaluation, an oral presentation will be evaluated for this criterion. A one (1) hour presentation demonstrating the Offeror's technical understanding and management approach to conduct the contract effectively will be evaluated. In addition, each Offeror is required to explain the approach it would use in carrying out a hypothetical task order (Refer to the Appendix B worksheet).
- (b) The degree of satisfaction of their answers in the technical and management areas shall be scored onto the worksheet by each TET member. The Government may request clarification of any points arising from the Offeror's presentation which are unclear. At the conclusion of the completed oral presentations and clarifications, if any, an averaged and weighted score per TET member along with any narrative adjectival rating shall be provided.

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VIII. **TET CONSENSUS AND REPORT SUMMARY**

- a) After the oral presentation, each TET member will complete the Appendix C worksheet, together with any narrative adjectival ratings for each Offeror. Each of the TET member's scores shall be integrated into the team's consensus score for each Offeror. As soon as the scoring process is completed, a session will be called with all TET members present to reach a consensus for the technical evaluation scoring. Once a consensus is reached, the technical evaluation report shall be generated.
- b) A standard technical evaluation report shall be prepared and signed by each TET member. Using the format prescribed in Attachment A the report shall summarize: (1) the basis of the evaluation; (2) the ranking of the Offerors; (3) strengths and weaknesses of each proposal; and (4) the TET activities that resolved any disagreements among its members and charted scores.
- c) This technical evaluation report should be completed on or before *(Insert date)* and submitted to the Contracting Officer for a anticipated contract award date of *(Insert date)*. The TET will then be available to answer any questions and/or participate in the debriefing process.
- d) Ensure that BEP form _____, Cover Page Source Selection Information, and BEP, Cover Page Proprietary Information, are used as cover sheets to the technical evaluation report. Copies of these forms are available on the internet at ([WEB ADDRESS](#)).

APPENDICES *(Complete as applicable to the procurement in question.)*

- A) WORKSHEET OF PAST PERFORMANCE EVALUATION
- B) WORKSHEET OF STAFFING AND TECHNICAL UNDERSTANDING AND MANAGEMENT APPROACH EVALUATIONS
- C) WORKSHEET OF TET SCORES AND THE RANKING OF OFFERORS