***Disclaimer: The author of the Source Evaluation Plan (SEP) is to tailor all aspects of the entire template, including sample evaluator rating sheets, to the individual source selection and ensure that any template areas providing sample information or instructions (i.e., [bracketed red and italicized language]) are deleted prior to finalizing the SEP.***

***This template includes various sample evaluator rating sheets. These sample sheets are provided for use in each source selection; however, the sheets need to be tailored for each individual procurement action. The sample evaluator rating sheets included at the end of the SEP template are not to be provided when submitting your completed SEP for approval.***

**LOWEST PRICE TECHNICALLY ACCEPTABLE (LPTA)**

**SOURCE EVALUATION PLAN**



**Date**

**Source Evaluation Plan**

**Approval and Concurrence**

***[Insert the required approvers of the Source Election Team]***

|  |  |
| --- | --- |
|  |  |
| ***[NAME],*** Technical Evaluation Team Lead, ***[ROUTING SYMBOL]*** | |
| Date: |  |

|  |  |
| --- | --- |
|  |  |
| ***[NAME],*** Source Selection Official/Contracting Officer, **AAQ-XXX** | |
| Date: |  |

|  |  |
| --- | --- |
|  |  |
| ***[NAME],*** Technical Evaluation Team Member ***[ROUTING SYMBOL]*** | |
| Date: |  |

|  |  |
| --- | --- |
|  |  |
| ***[NAME],*** Technical Evaluation Team Member ***[ROUTING SYMBOL]*** | |
| Date: |  |

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# 

# **INTRODUCTION**

***[Include a brief introduction about the Project and the overall use of the Source Evaluation Plan]***

**Example:** This Source Evaluation Plan (SEP) has been prepared in accordance with the Federal Aviation Administration (FAA) Acquisition Management System (AMS) and sets forth the processes that will be used for PROJECT NAME source evaluation and selection. Specifically, this plan describes the source selection organization, source selection processes, and ground rules for conduct of the evaluation.

# **PURPOSE**

***[Include a brief description of the requirement, a summary of the objectives of the acquisition, and reference(s) to applicable AMS Guidance. Your description should also provide information on the type of acquisition (e.g., competition, small business set aside, etc.)]***

**Example:** The SEP provides the evaluation guidelines for the selection of the Offeror whose proposal for PROJECT NAME represents the “Best Value” to the FAA considering the evaluation criteria specified in Section M of the Solicitation. This SEP describes the information and processes that will be used to conduct the evaluation of Offeror proposals and how they factor into an award decision. The SEP identifies the Source Selection Organization which is comprised of the Source Selection Official (SSO), the Contracting Officer (CO), a Legal Advisor, and the Source Evaluation Team (SET).

# **NATURE AND SCOPE OF THE ACQUISITION**

## Description of the Effort

***[Provide a description of the requirement].***

**Example:** The purpose of this project is ***[DESCRIPTION OF PROJECT]***. This procurement will be awarded to the contractor whose proposal meets all technical criteria as specified in this plan and whose proposal complies with all terms and conditions of the SIR at the lowest offered price.

## Acquisition Strategy

***[Briefly describe the acquisition strategy for this requirement].***

**Example:** The ***[PROJECT NAME]*** acquisition and source selection are being conducted in accordance with AMS Clause 3.2.2.3 Source Selection. The Government contemplates awarding a Firm Fixed Price Contract for a period of five (5) years.

## Source Evaluation Milestones

***[The milestone schedule is typical of actions taken and should be tailored as necessary to address particular requirements and process steps associated with the source selection. Please tailor milestone schedule to proposed procurement.]***

**Example:** Source Evaluation Estimated Milestone schedule.

|  |  |
| --- | --- |
| **Milestone** | **Date** |
| Source Evaluation Plan Approved |  |
| Draft SIR Issued |  |
| Final SIR Issued |  |
| Proposals Received from Offerors |  |
| SSO Source Selection Decision |  |
| Contract Award |  |

# **PROCUREMENT INTEGRITY**

***[This language can be boilerplate for Procurement Integrity].***

All source evaluation team members involved in the selection process will be familiar and comply with AMS Guidance T3.1.8 Procurement Integrity Act. The source evaluation team members are required to submit Conflict of Interest and Non-Disclosure documentation to the Contracting Officer (CO). Individuals will not be permitted to review proposals until all required forms are signed and they receive Procurement Integrity training. The CO will review all Conflict of Interest documentation for possible conflicts of interest. If an actual or potential conflict of interest is found to exist, the CO, after consulting with Counsel, will recuse the person from participation in the selection process.

# **SOURCE SELECTION ROLES AND RESPONSIBILITIES**

***[Provide a description of the source selection roles and responsibilities to ensure a successful source evaluation and selection. A list of source selection team roles and responsibilities can be found in AMS T3.2.2.4.A.2. The source selection team may be comprised of the Source Selection Official, Source Evaluations Team, Contracting Officer, Product or Service Team Lead or Director of the Requiring Service Organization, nongovernmental evaluators and advisors, and support personnel. The composition of the source selection team will vary based on the size and complexity of the procurement.]***

**Example:** The Source Selection Evaluation team shall consist of the following individuals. The FAA reserves the right to add, remove, or replace individuals of the Evaluation Team.

|  |  |  |  |
| --- | --- | --- | --- |
| **Role** | **Name** | **Division** | **Phone Number** |
| Source Selection Official /Contracting Officer |  | AAQ-XXX | XXX-XXX-XXXX |
| ***[Technical Evaluation Team Lead/Chairman]*** |  |  |  |
| ***[Technical Evaluation Team Member]*** |  |  |  |
| ***[Technical Evaluation Team Member]*** |  |  |  |

The Source Selection Evaluation team shall consist of respective sub-teams to complete the technical evaluation and pricing analysis. Additionally, the team shall have a source selection official assigned.

The duties and responsibilities of the Technical Evaluation Team (TET) shall consist of the following:

Technical Evaluation Team Lead shall:

* Provide written notice to evaluation members of their selection.
* Obtain signature of each evaluator to certify that he or she has read and understands FAA Order 3750.3B, DOT Regulations on Employee Responsibilities and Conduct. No evaluator is permitted to have monetary or proprietary interest in any company whose proposals are being evaluated.
* Schedule and conduct team meetings.
* Review, discuss, and reconcile, as necessary; comments, findings, and ratings of evaluation team members. If no reconciliation is achieved, the chairperson will ensure each member affected in the difference has prepared supporting rationale for the record.
* Coordinate and prepare a summary report of each proposal, which summarizes the team findings.
* Ensure that a record of all notes, contracts, meetings, discussions, and data pertinent to the evaluation are maintained and safeguarded.
* Ensure that a record of all notes, contacts, meetings, discussions, and data pertinent to the evaluation are maintained and safeguarded.
* Provide all information, reports, briefings, or other assistance regarding the evaluation proceedings as may be needed by the requiring organizations.
* Prepare a Technical Evaluation Team report to the Contracting Officer. The Technical Evaluation Team Report will be reviewed and signed by the TET Lead and all team members. This report will state the findings on the results of the evaluation. This report shall include a narrative statement covering the significant strengths and weaknesses which significantly affected the evaluator’s decisions as to pass/fail ratings.
* Participate in all phases of the technical evaluation process including evaluating and scoring technical proposals.

Source Selection Evaluation Team Member(s) shall:

* Evaluate each proposal in accordance with the evaluation procedures described in this evaluation plan. For documentation purposes, each evaluator shall use the score sheets attached to this plan. The evaluator shall cite specific references from the proposals that support their judgment; e.g., page number, paragraph number, briefing.
* Be knowledgeable of the contents of the Statement of Work, each Offeror’s proposal and substantiating documents.
* When opposing determinations are reached, the evaluators will discuss rationale to support their respective determinations in an attempt to reconcile the determinations. If no reconciliation is achieved, the evaluator(s) having the divergence will document the rationale for the record.
* Participate in the preparation of the summary reports for each proposal.
* Maintain a record of all notes taken to facilitate their evaluation.
* Provide post-evaluation assistance as might be needed concerning explanations or debriefings related to the technical evaluation.
* Assist the Lead/Chairperson in preparing the technical report to the Source Selection Official.

The Source Selection Officer shall:

* Select the source(s) for contract award.
* Approve the Technical Evaluation criteria and plan and ensures the SIR is consistent with both.
* Ensure the disciplines needed to prepare contract documents, solicit and select sources, award contract, and administer contracts are properly represented on the team.
* Make the final source selection decision for an award, and ensures the rationale is documented before contract award.

Advisors are non-voting team members that have expertise that is not otherwise available to the evaluation team but considered essential to the selection process. Advisors are either Government or Non-Government personnel who actively participate in the evaluation. Advisors shall:

* Review and abide by all provisions of this plan
* Complete and adhere to Conflict of Interest and Non-Disclosure requirements and rules of conduct
* Complete evaluation training
* Ensure that the proposals and related information are safeguarded against unauthorized disclosure
* Read all proposal information related to the assigned evaluation team
* Participate in debriefings to Offerors if requested by the CO
* Participate in team discussions
* Identify potential clarification requests
* Analyze and provide assessments of proposals being evaluated by the particular team
* Assist with the preparation of the team’s evaluation report

# **NON-GOVERNMENT PERSONNEL**

## Prohibitions

Non-government personnel may support the source evaluation; however, the development of the best value recommendation and the award decision are the responsibility of Government personnel exclusively. The SSO may add advisors to the SET at any time during the evaluation. Any support Contractor approved to participate in the Evaluation process is required to complete a Non-Disclosure Agreement and conflict of interest form prior to participation.

## Organizational Conflict of Interest (OCI)

OCI clauses are included in contracts when non-Governmental technical advisors have been approved in accordance with the above paragraph to provide support to this source selection. The OCI clauses require the companies and individual non-Government advisors to protect Offeror proprietary data and Government source selection information and prohibit the companies from otherwise participating as an Offeror, a subcontractor, or as a consultant to an Offeror/subcontractor in relation to this acquisition.

# **RULES OF CONDUCT**

No source selection participant shall:

1. Discuss proposals, findings, recommendations, etc., outside working places or within hearing range of individuals not participating in the source selection
2. Discuss source selection sensitive information among individuals not involved in the source selection process.
3. Accept an invitation from an offeror or offeror’s personnel to participate in any event/function, regardless of how remote it may be from the source selection process, without first consulting and obtaining the approval of General Counsel. Refer to General Counsel all questions relating to standards of conduct/conflicts of interest as soon as they arise.
4. Discuss the procurement with any person who is not part of the Source Selection Team, even after announcement of a winning offeror.
5. Confirm individual participation in the evaluation/source selection process, the number or identities of evaluators, the number or identities of offerors, or any other information related to the procurement, no matter how innocuous or trivial it may seem. Any contact from persons not involved in the source selection process must be reported immediately to the SSA and the Contracting Officer.
6. Engage in prohibited conduct (e.g., knowingly furnishing source selection information, revealing an offeror’s price without that offeror’s permission, revealing an offeror’s technical solution, or revealing the source(s) of past performance information).

# **SECURITY OF PROPOSALS AND SOURCE SELECTION INFORMATION**

## Security of Proposals

1. Administrative Restriction. All proposals, supporting materials, evaluation procedures, guidelines, score sheets, and comments are administratively restricted and shall be safeguarded to avoid any compromise of findings or ratings.
2. Prohibitions. All evaluation team members are expressly prohibited from revealing to anyone outside the team any information on the proceedings, methods, or scores of the evaluation. No rules or regulations can cover all possible situations, and there is no final substitute for good judgment and personal integrity.
3. Avoid Contacts. All evaluation team members are expressly prohibited from discussing the evaluation proceedings with any other person not involved in the evaluation, except as may be authorized by the Contracting Officer. Avoid contact, if at all possible, with the vendors involved in the acquisition and their representatives. Members shall also exercise due care in any discussion of technical evaluation proceedings with other evaluators outside the evaluation area.
4. Conflict of Interest. Each member of the team shall execute all required conflict of interest and non-disclosure statements.
5. Storage. All proposals, and copies thereof, containing proprietary data will be stored in a secure area when not being evaluated. No official security classification is required for the proposals.

## 

## Control of Source Selection Sensitive Information

An electronic evaluation file will be maintained by the Contracting officer/specialist. This file will contain all correspondence and working papers applicable to a specific evaluation.

As a minimum, the file should contain the following documentation:

* Memoranda and correspondence related to the selection of the evaluation board.
* Originals of all individual evaluation work sheets.
* Copies of the composite evaluation work sheets and the narrative report.
* All technical proposals and evaluation work sheets will be treated "SOURCE SELECTION SENSITIVE." These documents will be handled and stored so proprietary information is not released to unauthorized personnel.

## 

## Code of Conduct and Safeguarding Proposal Evaluation Information

All proposals, supporting materials, evaluation procedures, guidelines, evaluation results, and comments are administratively restricted and must be safeguarded to avoid any compromise of findings or ratings. All evaluation team members are expressly prohibited from revealing to anyone outside their individual team any information on the proceedings, methods, or ratings determined during the evaluation process. It should be assumed that all information contained in proposals is proprietary. Information provided must not be used for any purpose other than to evaluate the proposal. The CO must authorize access to the proposal information. No rules or regulations can cover all possible situations, and there is no final substitute for good judgment and personal integrity. Further, all evaluation team members are expressly prohibited from discussing the evaluation proceedings with any other persons not involved in the evaluation, except as may be authorized by the CO. Avoid contact, if at all possible, with the firms involved in the acquisition and their representatives. Members will also exercise due care in any discussion of technical evaluation proceedings with other evaluators outside the evaluation area. All proposals, and copies thereof, containing proprietary data will be stored in a secure area when not being evaluated.

# **SOURCE SELECTION/EVALUATION PROCESS**

## Source Selection Overview

***[Indicate here whether the basis for award will be the Lowest Price-Technically Acceptable proposal. For a Lowest Price-Technically Acceptable evaluations, where tradeoffs are not permitted, briefly summarize evaluation factors/subfactors that establish the requirements of acceptability. All LPTAs must evaluate cost/price and the acceptability of the product or services.]***

Award will be made on the basis of the lowest priced, technically acceptable proposal from a responsible Offeror.

***[List here all Non-Cost/Price factors and sub-factors to be evaluated, other than Past Performance.]***

**Example:**

### **Technical Evaluation**

All technical evaluation team members shall review the specific criteria within the technical proposals using an “ACCEPTABLE” or “UNACCEPTABLE” rating. All offerors will be evaluated for all factors without exception. All ratings, whether “ACCEPTABLE” or “UNACCEPTABLE” will be documented fully to include the rationale for the rating and a reference to the specific portion of the Offeror’s proposal that the evaluator(s) used to determine their rating.

### **Price Evaluation**

The price proposal will be analyzed for fairness and reasonableness and balanced pricing among the contract line items (CLINs). It may also be analyzed to determine whether it is realistic for the work to be performed and reflects a clear understanding of the Government’s requirements.

### **Source Selection Decision**

The SSO is responsible for independently determining if the lowest-priced, technically acceptable vendor has proposed a fair and reasonable price and is otherwise eligible for award. Trade-offs are not permitted. Offerors must be rated "ACCEPTABLE" on all factors to be considered technically acceptable.

## Source Selection Evaluation Process

### **Evaluation Procedures**

* A preliminary review of all submissions will be accomplished to ascertain if any of the proposals contain ambiguities and to determine if the proposals are grossly deficient.
* The individual evaluators will read, evaluate, and become thoroughly familiar with the proposals in accordance with this plan. The evaluator will independently evaluate one proposal at a time. After the evaluation for that proposal is complete, evaluation can begin on the next proposal until all proposals are evaluated.
* The evaluation will be based on an acceptable/unacceptable basis with no allowance for “gray” area decisions. If any aspect of the Offeror’s proposal is insufficient, the inadequacies should be listed.
* The written description forms part of the final report to the Contracting Officer.

### **Communications with Offerors**

Communications with the offeror are not required. However, if a particular submission needs clarification/supplemental information, the CO will be notified, in writing by the evaluation team members, and communication may be conducted with the offeror. The offeror will submit and the board will evaluate all revisions/clarifications to the elements that were discussed.

### **Evaluation Methodology**

* The vendor shall submit an offer acceptable for award in accordance with Section L, Instructions to Offerors, and; the evaluation criteria outlined in Section M. The vendor shall assent to the terms and conditions of the model SIR (Sections A through K that includes the provisions, contract clauses, Statement of Work (SOW), and documents, exhibits, and attachments.
* Each proposal will be evaluated based on the proposed technical approach of satisfying the requirements of the SOW and the realism and reasonableness of the proposed cost.
* The evaluation is a team effort. The technical team will individually review and score each proposal in accordance with the rating criteria specified in Section M. Upon completion of the technical evaluation, the team will convene and review all evaluation findings and ratings, conduct all necessary analyses of the evaluation process, and prepare a report to the SSO. The report will outline the results of their review and analysis and shall include a recommendation as to which vendor provides the best value to the FAA based on the evaluation criteria. From these scores and the results of the cost proposal evaluation, a selection will be made.
* All briefings to the SSO of vendor proposals will be conducted in a manner that would preclude the true identity of the vendors from being revealed to the persons being briefed until a selection decision has been made.

### **Evaluation of Non-Cost/Price Factors**

***[The evaluation factors and subfactors shall be the primary determinant of the detailed information requested in the SIR’s Section L Instructions to Offerors and Section M Evaluation Factors for Award. If subfactors are used, they are to be evaluated separately. The SET will establish the factors and sub factors to be evaluated on an “acceptable” or “unacceptable” basis].***

**Example:** LPTA non-price factors include the following:

**Factor 1- Relevant Experience**: Demonstrate the experience of offeror and/or proposed team, including sub-contractors, on projects same/similar to that described in the SOW for the ***[PROJECT NAME].***

The Offeror shall complete a minimum of three (3), but no more than five (5), "Past Performance Experience Information" forms, attached to the SIR (Section J, Attachment 9 in response to this factor. All blocks must be filled in and all data should be accurate, current, and complete. All projects submitted must have been underway or completed within the last **X** years through the closing date identified on the SIR. Each project provided must be valued at or over **$XXXXX.** If the Offeror does not have prior prime contracts to cite, then the Offeror may cite instances on which it has served as a primary subcontractor.

**If any of the information required is not included in the form then the Offeror will be considered non-responsive and evaluated as unacceptable.**

**Evaluation Criteria:** The Government's Source Evaluation Team will review the project experience of the offeror, including subcontractors, on projects provided in response to Factor 1. Offerors must meet all of the following minimum acceptability standards to receive an "ACCEPTABLE" on this factor:

* Offeror must have three (3) projects that are same/similar to that of the work required in the project specifications and this solicitation; AND
* Each project submitted must be valued at or over $**XXXXX**; AND
* Projects submitted must have been completed, or underway, within the last **X** years through the closing date of the SIR.

Failure to demonstrate the minimally acceptability standards under this factor will result in an "UNACCEPTABLE" rating and possible elimination from further consideration for contract award.

### **Factor 2: Past Performance:**

***[The past performance evaluation is an assessment of the Offeror’s probability of meeting the minimum past performance solicitation requirements. This assessment is based on the Offeror’s record of relevant and recent past performance information that pertain to the products and/or services outlined in the solicitation requirements].***

Past performance shall be used as an evaluation factor within the LPTA process, unless waived by the CO. Past performance will be rated on an "acceptable" or "unacceptable" basis using the Past Performance ratings.

### **Adjectival Ratings for Non-Cost/Price Factors**

***The past performance evaluation is an assessment of the Offeror’s probability of meeting the minimum past performance solicitation requirements. This assessment is based on the Offeror’s record of relevant and recent past performance information that pertain to the products and/or services outlined in the solicitation requirements.***

* All vendors will receive an Acceptable or Unacceptable rating for each factor according to quality of their submission. All vendors will be rated according to the rating scheme outlined in this section.
* Each evaluator will use the following criteria to measure and score each proposal. Scoring will reflect the extent to which the vendor has met the overall factor requirements. Upon completion of the evaluation of each factor by a member of the evaluation team, the lead technical evaluator will summarize the proposals in a manner that determines which proposals are acceptable and which are unacceptable to support. Evaluation factors will be scored as outlined below to which the Offeror has met the overall factor requirements.

| **Rating** | **Definition** |
| --- | --- |
| **Acceptable** | The proposal meets the stated requirements. The response is considered complete in terms of the basic content and level of information the Government seeks for review. |
| **Unacceptable** | The proposal fails to meet the stated requirements. The response is considered deficient in terms of basic content and support the Government seeks for review. |

There is no weighting of factors under this acquisition since the evaluation method/process is Lowest Priced, Technically Acceptable (LPTA).

## Price

LPTA is applied to known, firm requirements, usually readily available in the commercial marketplace where a fair and reasonable price determination is based on adequate price competition. Therefore, price analysis will normally be used to determine the reasonableness of total evaluated price to support the selection of the lowest priced, technically acceptable offeror.

## Risk Assessment

There is no separate risk assessment for the factors under this acquisition since the evaluation method/process is Low- Priced, Technically Acceptable (LPTA).

APPENDIX 1: SECTION L – INSTRUCTIONS TO OFFERORS

***[Insert Section L of the Request for Proposals]***

APPENDIX 2: SECTION M – EVALUATION FACTORS FOR AWARD

***[Insert Section M of the Request for Proposals]***

**ATTACHMENT 1**

**LPTA EVALUATION INDIVIDUAL / CONSENSUS WORKSHEET**

|  |  |
| --- | --- |
| **SIR NUMBER:** | 69XXX-XX-R-000XX |
| **PROJECT:** |  |
| **EVALUATOR:** |  |
| **OFFEROR:** |  |

**This is an objective evaluation. The rating will be either “ACCEPTABLE” or “UNACCEPTABLE” against the criteria/measurement in the SIR. At the time a contractor receives an “UNACCEPTABLE” rating for any factor, the rationale for the rating will be documented below and the proposal will not be evaluated further.**

|  |  |
| --- | --- |
| Factors | Rating and Rationale |
| Factor 1, Relevant Experience | Rating (circle one): ACCEPTABLE NONACCEPTABLE  Rationale: |
| Factor 2, Administrative Requirements | Rating (circle one): ACCEPTABLE NONACCEPTABLE  Rationale: |

Is this proposal considered otherwise ACCEPTABLE for award? YES NO

# **ATTACHMENT 2**

# **LPTA EVALUATION SUMMARY OF FINDINGS**

**SIR NUMBER: 69XXX-XX-R-000XX**

**PROJECT: XXXXXXX**

The rating has been determined to be either “ACCEPTABLE” or UNACCEPTABLE” against the criteria/measurement in the SIR. At the time a contractor receives an “UNACCEPTABLE” rating for any factor, the rationale for the rating will be documented below and the proposal will not be evaluated further. Following is the summary findings:

|  |  |  |  |
| --- | --- | --- | --- |
| **Contractor**  **Name** | **Factor 1** | **Factor 2** | **Acceptable for Award? (Y/N)** |
| Contractor A |  |  |  |
| Contractor B |  |  |  |
| Contractor C |  |  |  |
| Contractor D |  |  |  |
| Contractor E |  |  |  |
| Contractor F |  |  |  |