**SOURCE EVALUATION PLAN**

**Lowest Priced, Technically Acceptable**

**Date [XX/XX/XXXX]**

1. 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 (complex source selection)]**

1. SOURCE EVALUATION MILESTONES (AMS 3.2.2.3.1.2.3) *[Please tailor milestone schedule to proposed procurement]*

| **Milestone** | **Date** |
| --- | --- |
| Source Evaluation Plan Approved |  |
| Pre-Solicitation Issued |  |
| Market Survey/Site Visits |  |
| Final SFO Issued |  |
| Proposals Received from Offerors |  |
| Price Evaluation Completed |  |
| Technical Evaluation Completed |  |
| Source Evaluation Team Report of Non-Cost/Price Evaluation |  |
| SSO Source Selection Decision |  |
| Contract Award |  |

1. SOURCE SELECTION TEAM (AMS T3.2.2.3.A.2) *[The composition of the source evaluation team will vary based on the size and complexity of the procurement. The following are provided as examples only and must be tailored to the procurement]*

| **Name** | **Title** | **Organization** |
| --- | --- | --- |
| **Source Selection Official (SSO)/**  **Real Estate Contracting Officer (RECO)\*** | | |
|  |  |  |
| **Source Evaluation Team (Technical, Pricing, etc.)** | | |
|  | **Technical Evaluation Team (TET)\*\*** |  |
|  | Project Management Representative |  |
|  | Portfolio Manager/LOB Representative |  |
|  | Technical Advisor- Facility Security |  |
|  | Technical Advisor- EOSH/ROSHER |  |
|  | Technical Advisor- Seismic Safety |  |
|  | Technical Advisor- Space Planner |  |
|  | Technical Advisor- [add as needed] |  |
|  | **Price Evaluation Team (PET)** |  |
|  | Price Evaluation to be conducted by the RECO |  |
| **Legal Advisor** | | |
|  |  |  |

\*For procurements not subject to the JRC investment decision process, the RECO is the SSO (T3.2.2.3.A.2.a).

\*\* If there is no separate Technical Evaluation Team, the SSO/RECO is also responsible for all documentation requirements relating to the Technical Evaluation.

1. RULES OF CONDUCT (AMS T3.1.5, T3.1.6, T3.1.8)

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 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).

In addition, the source selection team must:

1. Handle information related to the source selection and Offeror proposal information with the utmost discretion. Source Selection Information (SSI) and Competition Sensitive Information (CSI) will be marked accordingly.
2. SOURCE SELECTION/EVALUATION PROCESS FOR LPTA IN REAL PROPERTY ACTIONS

The SET will evaluate proposals in strict accordance with the instructions to offerors in Section 2- How to Offer (Attachment 1) and evaluation factors for award stated in Section 3- Basis for Award (Attachment 3) of the SFO. Award will be made to the responsive and responsible offeror(s) whose proposal represents the best value to the Government.

* 1. RESPONSIVENESS (T3.2.2.3)

The RECO will evaluate the offers in accordance with Section 2 and Section 3 of the SFO; specifically, the RECO will evaluate the Offer’s against the List of Required Submittal Documents to ensure that the Offeror has provided all required information. The RECO may engage in communications for minor clarifications; however, the RECO shall not allow an Offeror to supplement its proposal. If an offer is found non-responsive, then it may be removed from futher consideration. (Note that if the SFO allows, the RECO may waive a requirement of the SFO, or accept minor irregularities or inconsistencies if he/she has a documented rational basis to do so.)

* 1. ORGANIZATIONAL CONFLICT OF INTEREST (T3.1.7)

Unless there is some other circumstance warranting further inquiry, the Contracting Officer’s determination may rely on the Offeror’s warranty in AMS Clause 6.3.47 (warranty is in effect if the Clause exists in the signed contract), and the existence of a statement by the Offeror its proposal in compliance with AMS Clause 6.3.47.

* 1. LOWEST-PRICED, TECHNICALLY ACCEPTABLE (LPTA) (T3.2.2.3.A.5)

The Contracting Officer will create an abstract of all responsive offers, and evaluate the lowest-priced vendor for responsibility (T3.2.2.7.A.2) and price reasonableness (T3.2.2.3.A.9).

As a part of the responsibility evaluation, the source selection team may evaluate the Offeror’s demonstrated record of recent past performance on similar contracts to determine its relevance to the Government’s current needs, the quality of that performance, and the degree of confidence the Government places in each offeror’s ability to meet its requirements (T3.2.2.3.B.2). If permitted by the SFO, then the CO may use any available past performance information in his/her responsibility review. The Contracting Officer will also check the Excluded Parties List System to determine whether the Offeror is responsible.

Similarly, as stated in the SFO, the RECO will perform a Present Value Price Evaluation, and, with it, make a price reasonableness assessment (based on market comparisons, IGCE, etc.) to determine whether the price is acceptable to both the Government and the Lessor.

If the offeror is responsible and its offered price is reasonable, then the Techncial Evaluation Team will evaluate the offer for technical acceptability. Technical acceptability is based on all “acceptable/unacceptable” factors listed within the Abstract of Offers. Offers deemed unacceptable in one or more requirements on the Abstract of Offers may be found unacceptable, and excluded from further consideration. (Note that if the SFO allows, the CO may waive a requirement of the SFO, or accept minor irregularities or inconsistencies if he/she has a documented rational basis to do so.) There is no weighting of factors since the source selection methodology is LPTA. The SSO may not take into account items in the proposal other than those marked “acceptable/unacceptable” on the Abstract of Offers.

If an Offeror is excluded, the Contracting Officer will evaluate the next, lowest-priced offeror, and so on.

Award will be made to the responsive, responsible lowest-priced, technically acceptable offeror, as this is determined to be the best value to the Government.

APPENDIX 1: SFO SECTION 2 – HOW TO OFFER

APPENDIX 2: ABSTRACT OF OFFERS

APPENDIX 3: SFO SECTION 3 – BASIS FOR AWARD

**CONCURRENCE & APPROVAL**

**Legal Sufficiency**

|  |  |  |
| --- | --- | --- |
| Name: |  | Date: |
| Signature: |  | |
| Organization: | FAA Assistant Chief Counsel, Acquisition & Fiscal Law, ***[AGC-500]*** | |

**Source Selection Official/Real Estate Contracting Officer Approval**

|  |  |  |
| --- | --- | --- |
| Name: |  | Date: |
| Signature: |  | |
| Organization: | Source Selection Official/Real Estate Contracting Officer, ***[AAQ-9XX]*** | |