



DEPARTMENT OF THE AIR FORCE
WASHINGTON, DC

MAY 2011

OFFICE OF THE ASSISTANT SECRETARY

POLICY MEMO 11-C-04

MEMORANDUM FOR ALMAJCOM/DRU/FOA (Contracting)

FROM: SAF/AQC
1060 Air Force Pentagon
Washington, DC 20330-1060

SUBJECT: Mandatory Air Force Source Selection Procedures

This memorandum provides the attached revised AFFARS Part 5315 and mandatory procedures (MP5315.3) for conducting Air Force Source Selections resulting from the publication of Department of Defense (DoD) Source Selection Procedures on Mar 4, 2011 (see DFARS 215.300 and PGI 215.3, <http://www.acq.osd.mil/dpap/policy/policyvault/USA007183-10-DPAP.pdf>). Embedded within the revised MP are hyperlinks to a large number of tailorable templates and samples for assisting source selection teams in preparing various source selection-related documents. Mandatory source selection training policy is established in MP5315.3, Chapter 6 and referenced in the attached revised AFFARS 5307.104(S-90)(a).

Consistent with the DoD procedures referenced above, this policy change is effective July 1, 2011 and is mandatory for all competitive acquisitions utilizing FAR Part 15 procedures. All Requests for Proposals issued after July 1, 2011 are subject to these procedures. A future Air Force Acquisition Circular will supersede this policy memo.

Please direct any questions to [REDACTED] SAF/AQCP at (571) 256-2409, DSN 260-2409, [REDACTED].

[REDACTED]
Acting Deputy Assistant Secretary (Contracting)
Assistant Secretary (Acquisition)

Attachments:

1. AFFARS 5315, 3 May 2011
2. Mandatory Procedures MP5315.3, 4 May 2011
3. AFFARS 5307.104(S-90)(a), 3 May 2011

PART 5315
Contracting by Negotiation

[Revised 3 May, 2011]

Note: This document contains revised source selection procedures [effective for Requests for Proposals (RFPs) issued after 1 July 2011].

SUBPART 5315.2 — SOLICITATION AND RECEIPT OF PROPOSALS AND INFORMATION

5315.209 Solicitation Provisions and Contract Clauses

(S-90) The contracting officer may include a provision substantially the same as the provision at [5352.215-9000](#), Facility Clearance, in solicitations that include a [DD Form 254](#), Contract Security Classification Specification.

(S-91) The contracting officer may include a provision substantially the same as the provision at [5352.215-9001](#), Notice of Pre-bid/Pre-proposal Conference, in the request for proposal when appropriate. When access to classified documents is contemplated, the contracting officer may include a provision substantially the same as the provision with its Alternate I.

(S-92) The contracting officer may not award or modify a contract that includes a special contract requirement commonly referred to as “Tail Up” or “Last Lot Inefficiency,” the purpose of which is to recognize costs related to a loss of productivity for the direct labor workforce or increased supplier costs as a production line nears shutdown, without the express written approval of the DAS(C) or ADAS(C). Requests for approval to use such a special contract requirement shall be submitted under signature of the SCO or SCCO and forwarded to SAF/AQC at safaqc.workflow@pentagon.af.mil for consideration of approval by the DAS(C) or ADAS(C). These requests must be made not less than 60 days prior to release of a solicitation or a proposed contract modification and include a copy of the special contract requirement and any supporting documentation.

5315.270 Peer Reviews

See 5301.170 for required procedures for Peer Reviews.

SUBPART 5315.3 — SOURCE SELECTION

5315.300 Scope of Subpart

See MP5315.3 for required Air Force Source Selection responsibilities and procedures.

SUBPART 5315.4 — CONTRACT PRICING

5315.400 (S-90)

See [MP5315.4](#) for required Air Force contract pricing procedures.

5315.403 Obtaining Cost or Pricing Data. (No Text)

5315.403-1 Prohibition on Obtaining Cost or Pricing Data ([10 U.S.C. 2306a](#) and [41 U.S.C. 254b](#))

(c) *Standards for exceptions from cost or pricing data requirements.*

(3) *Commercial Items.*

(B) Using the Mandatory Procedures detailed in [MP5315.403-1\(c\)\(3\)](#), MAJCOM, DRU, and AFISRA SCOs shall submit an annual report for contracts, subcontracts, or modifications expected to have a total value of \$15,000,000 or more identifying cost or pricing data exceptions for commercial item procurements ([FAR 15.403-1\(b\)\(3\)](#)).

(4) *Waivers.*

(A) Follow the procedures in [MP5315.403-1\(c\)\(4\)\(A\)](#) to submit a request for waiver of the Cost or Pricing Data requirement through the MAJCOM/DRU SCO to the HCA (see [5301.601\(a\)\(i\)](#)). The request shall include a determination explaining the details as to (1) why the property or services cannot be reasonably obtained without the waiver; (2) the methodology to be used in determining whether the price is fair and reasonable without submission of cost or pricing data; and (3) how the government will benefit from the granting of the waiver.

(B) Using the procedures in [MP5315.403-1\(c\)\(4\)](#), MAJCOM, DRU, and AFISRA SCOs shall submit an annual report identifying cost or pricing data waivers ([FAR 15.403-1\(b\)\(4\)](#)) for contracts, subcontracts, or modifications expected to have a total value of \$15,000,000 or more.

5315.403-4 Requiring Cost or Pricing Data ([10 U.S.C. 2306a](#) and [41 U.S.C. 254b](#))

(a)(2)(i) Follow the procedures in [MP5315.403-4](#) to submit a Determination and Findings for HCA signature authorizing the contracting officer to obtain cost or pricing data for actions below the pertinent threshold in [FAR 15.403-4\(a\)\(1\)](#), provided the action exceeds the simplified acquisition threshold.

5315.404-3 Subcontract Pricing Considerations

See [IG5315.404-3](#) for additional subcontract pricing considerations.

5315.404-4 Profit

(c)(2)(90) Chief of the Contracting Office may approve written requests for the use of an Alternate Structured Approach. This authority may not be re-delegated.

5315.406-3 Documenting the Negotiation

(a) See [IG5315.406-3](#) for a Price Negotiation Memorandum (PNM) Checklist that may be used to ensure PNMs contain all required information.

5315.407 Special Cost or Pricing Areas

5315.407-90 Contract Audit Follow-Up (CAFU)

Follow [MP5315.407-90](#) for conducting contract audit follow-up (CAFU).

5315.407-91 Formula Pricing Agreements

Formula Pricing Agreements (FPAs), sometimes referred to as spare parts pricing agreements, may be used by contracting officers to establish the pricing methodology for more than one future contract action. They may also be used to establish a pricing methodology for corporate contracts and strategic sourcing agreements. While use of FPAs is optional, contracting officers shall follow [MP5315.407-91](#) to establish an FPA.

5315.407-4 Should-cost Review

(b) Program should-cost review.

(4) The contracting office organizes and manages the program should-cost review. The team chief is responsible for the completion of the should-cost report.

SUBPART 5315.6 — UNSOLICITED PROPOSALS

5315.606 Agency Procedures

See [MP5315.606](#) for review of unsolicited proposals.

Mandatory Procedure

MP5315.3 Source Selection

Revised 4 May 2011

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Introduction

Specific source selection-related documents reside on Air Force Contracting Central, Knowledge Center, in [Part 5315](https://cs.eis.af.mil/airforcecontracting/knowledge_center/Pages/5315-main.aspx) of the AFFARS Library (https://cs.eis.af.mil/airforcecontracting/knowledge_center/Pages/5315-main.aspx) under the section entitled “**Community Advice**”. The following tailorable documents are hyperlinked from within this Mandatory Procedure (MP):

- **Samples / Templates** (*e.g., Source Selection Plan, various Section L and Section M language samples, Evaluation Notice, SSEB Evaluation Documentation, Proposal Analysis Report, Comparative Analysis Report and Award Recommendation, Source Selection Decision Document, and various briefings -- all tailorable to the unique aspects of an acquisition*)
- **Good Practices / Lessons Learned**

These resources are provided for your benefit to assist in the preparation of source selection-related documentation and the execution of source selection activities.

Comments and recommendations concerning this MP may be submitted to [SAF/AQCP](#), 1060 Air Force Pentagon, Washington, DC 20330-1060.

Chapter 1

Purpose, Roles, and Responsibilities

1.1 Purpose. This Mandatory Procedure (MP) sets forth supplemental procedures for conducting competitively negotiated source selections within the Air Force, and follows the numbering convention of the [Department of Defense \(DoD\) Source Selection Procedures](#). Only those paragraphs with supplementary Air Force text are included herein.

1.2 Best-Value Continuum (No AF Text)

1.3 Applicability. This MP is not a stand-alone document and therefore shall be used in conjunction with FAR Part 15, as supplemented, to include the DoD Source Selection Procedures, related law, regulation, and policy. This MP is applicable to all negotiated, competitive acquisitions using FAR Part 15 procedures regardless of source selection approach taken within the best-value continuum. Compliance with this MP is not required for acquisitions exempted in the DoD Source Selection Procedures paragraph 1.3. Deviations from this MP must be approved by SAF/AQC. A request for waiver to any portion of the DoD Source Selection Procedures shall be forwarded to SAF/AQC (safaqc.workflow@pentagon.af.mil) for review and processing to the Director, Defense Procurement and Acquisition Policy.

1.4 Source Selection Team Roles and Responsibilities. Mandatory Air Force Source Selection Training for members of the acquisition/source selection team (SST) is set forth in [Chapter 6](#).

1.4.1 SSA.

1.4.1.1 Appointment of SSA:

SSA Designations	Below \$10M	\$10M to less than \$100M <i>Note 2</i>	\$100M and above <i>Note 3</i>
ACAT I, IA	<i>Note 1</i>	ASAF(A)	ASAF(A)
ACAT II and III	<i>Note 1</i>	PEO/DAO	PEO/DAO -- <i>Note 4</i>
Services Acquisitions	<i>Note 1</i>	<i>Note 5</i>	PEO -- <i>Note 4</i>
Other Contracting (e.g., commodities, construction)	<i>Note 1</i>	<i>Note 5</i>	<i>Note 5</i>

NOTES:

1. Procuring Contracting Officer (PCO) or equivalent or higher position within the Program Executive Officer (PEO)/Designated Acquisition Official (DAO) chain, as designated in the approved acquisition planning document (e.g., Life Cycle Management Plan {LCMP}/Acquisition Plan {AP}).
2. Delegable to no lower than the PCO or equivalent or higher position within the PEO/DAO chain.
3. Delegable to no lower than one level above the PCO or equivalent or higher position within the PEO/DAO chain.
4. Generally, AFPEO/CM is the Source Selection Authority for A-76 acquisitions involving 300 or more positions or services acquisitions >\$100M, unless an executed Expectation Management Agreement (EMA) states otherwise. For services acquisitions not in a PEO portfolio, see Other Contracting.
5. The SSA is the Center Commander/Wing Commander/PEO or MAJCOM/DRU director-level individual who is responsible for the requirement. **For acquisitions below \$100M**, SSA is delegable to no lower than the PCO or equivalent or higher position within the PEO/DAO chain.

1.4.1.2 SSA Responsibilities. The SSA shall:

1.4.1.2.2 Ensure the appointment of the Source Selection Evaluation Board (SSEB) Chairperson on ACAT I competitive acquisitions prior to Milestone B (pre-MDAP on Major Defense Acquisition Program lists), and S-CAT1 acquisitions over \$1B, is approved by the Senior Procurement Executive (SPE). In the absence of the SPE, the Deputy Assistant Secretary (Contracting) (DAS(C)) may approve this appointment. The Center Commander will submit a nomination package for SPE approval to SAF/AQC (safaqc.workflow@pentagon.af.mil) and allow 10 working days for SPE approval. The nomination package will include background information on the candidate. Such information will describe the candidate's relevant experience and positions held and will provide a rationale for concluding that the selected candidate is the best qualified to perform the duties of SSEB Chairperson. SAF/AQCK or AQCA will coordinate the nomination package with the DAS(C) and SPE. The DAS(C) will review each nomination package prior to SPE consideration. The DAS(C) and/or SPE, at their discretion, may interview the proposed candidate. Also, the DAS(C) or the SPE may request additional nominees be submitted for consideration.

1.4.1.2.3 For ACAT I and II source selections, consider the experience of individuals identified in the Acquisition Career Management System (ACMS) when appointing personnel to the SST.

1.4.1.2.6 See Attachment 1 for the [Source Selection Non-Disclosure Agreement \(NDA\)](#) and Attachment 2 for the [Conflict of Interest Statement](#). The NDA shall be executed by individuals once assigned to the SST. An NDA may be executed on an annual basis in accordance with [AFFARS 5303.104-4](#). After receipt of proposals (when the offerors/subcontractors are known) and prior to any SST member/advisor accessing a proposal (or performing their respective role), a Conflict of Interest Statement must be executed by each member of the SST.

1.4.2 PCO.

1.4.2.1 Selection of PCO: The procedure in paragraph 1.4.1.2.2 applies to the selection of the individual to serve as the PCO for ACAT I competitive acquisitions prior to Milestone B (pre-MDAP on Major Defense Acquisition Program lists).

1.4.2.2 PCO Responsibilities. The PCO shall:

1.4.2.2.1.2 No later than 30 days after contract award or termination/cancellation of source selection for ACAT I or II source selections, complete and submit the [Source Selection Participants Worksheet](#) to SAF/AQCK (safaqc.workflow@pentagon.af.mil) using information from the approved Source Selection Plan (SSP). Source selection participants include all members of and advisors to the SSAC and the SSEB but exclude non-Government participants. For the Source Selection Role column, use only those roles that appear in the drop-down list of choices; do not create any new roles.

1.4.2.2.1.3 No later than 90 days after contract award or termination/cancellation of the source selection, the PCO shall [post lessons learned](#) compiled during the source selection.

1.4.2.2.3 In conjunction with the SSEB, ensure all means of electronic communications receive additional scrutiny prior to release. Prevent release of electronic documents that contain sensitive or embedded source selection files (i.e., use of secondary reviews before files are released). If email is used to transmit source selection information, it shall be encrypted and the subject line shall include the phrase "Source Selection Information – See [FAR 2.101](#) and [3.104](#)". See Attachment 3 for the [Source Selection Information Coversheet](#).

1.4.2.2.4 Maintain evaluation material and any related supporting information developed by any member of the SST that has been presented in any form to the SSA as an official record

that must not be altered. Updates, revisions, or changes to that evaluation information must be captured in subsequent documentation in a way that the original record remains distinct. Evaluation materials are considered working papers prior to their disclosure to the SSA. These working papers may be changed or modified by their author, as necessary, in order to support the evaluation process.

1.4.2.2.4.1 Ensure that any requests for source selection delegations are properly accomplished and documented in the source selection file.

1.4.2.2.6 The PCO shall send a notice concurrent with issuance of the solicitation announcing that a source selection is in progress. This notice shall be forwarded to all appropriate organizations, regardless of estimated dollar value. For acquisitions estimated to be \$100M or more, send the notice to SAF/AQC (safaqc.workflow@pentagon.af.mil) for HAF notification. The notice shall identify:

- 1) the system, subsystem, service, or project involved;
- 2) the anticipated period of the source selection activities;
- 3) statement to the effect that contacts or briefings concerning the program by industry are no longer allowed outside of the formal source selection process; and
- 4) that the procuring contracting officer (include name and phone number) is the person who controls all contact or exchanges with industry/offers and is the only person authorized to release source selection information before and after contract award.

1.4.3 SSAC.

1.4.3.2 Composition of SSAC.

1.4.3.2.2 SSAC members provide consistency and mentoring to SSTs to elevate the skills necessary to accomplish successful source selections. For all new Milestone B (Pre-MDAP on Major Defense Acquisition Program lists) ACAT I and II competitive acquisitions, the specific composition of the SSAC should at a minimum consist of senior leaders (flag rank or O-6/GS-15 to the maximum extent practicable) from Program Management, Engineering, Finance, Legal, Contracting and the Center's Acquisition Center of Excellence (ACE), with recent experience in the successful conduct of source selections. The SSAC may be augmented with senior leaders from the SAF/AQ staff, when appropriate, to provide additional experience and expertise. The SSAC may also be supplemented by other subject matter experts at comparable functional positions. For non-weapon system acquisitions when an SSAC is used (either because the total estimated value of the acquisition is \$100M or more or the estimated value is below \$100M but an SSAC is desired by the SSA), the specific composition of the SSAC is at the discretion of the SSA, based upon the expertise required to accomplish a successful source selection.

1.4.4 SSEB.

1.4.4.2 Responsibilities of the SSEB.

1.4.4.2.1 SSEB Chairperson shall:

1.4.4.2.1.1 For ACAT I or II source selections, obtain a list of individuals with source selection experience from SAF/AQCK (safaqc.workflow@pentagon.af.mil) and provide the list to the SSA (see paragraph 1.4.1.2.3).

1.4.4.2.1.2.2 After SSP approval, document any subsequent SSEB personnel replacements/additions in an addendum to the SSP. The addendum requires SSA approval unless the SSA delegates this responsibility to the SSEB Chairperson within the SSP.

1.4.5 Advisors.

1.4.5.1 Government Advisors. Foreign Military Sales (FMS) customers and international cooperative project partners may participate in the source selection process as advisors only. The PCO shall not release cost information or any part of an offeror's cost proposal to representatives of FMS customers.

1.4.5.2 Non-Government Advisors. Support contractors, including FFRDC employees may not serve as an advisor to the Past Performance Team, as Chairperson of an SSAC, or as an SSA. Access to offeror proposals shall be restricted to only those portions for which the individual's expertise is required to support the evaluation (e.g., software support contractor only reviews software hours proposed) but in no event will non-Government advisors have access to any offeror's past performance information.

1.5 Program Management/Requirements Office Roles and Responsibilities (No AF Text)

Chapter 2

Pre-Solicitation Activities

2.1 Conduct Acquisition Planning

2.1.1 Acquisition Planning.

2.1.1.3 Acquisition of Services. See [AFI 63-101, Chapter 4](#).

2.1.1.4 Independent Management Reviews (“Peer Reviews”). See [AFFARS 5301.170](#) and [5301.9001\(b\)](#).

2.2 Develop an SSP

The PCO and the SSEB chair (with assistance from SSEB members, as necessary) shall prepare the SSP. A tailorable [SSP template](#) is available in Part 5315 of the AFFARS Library.

The PCO shall maintain the SSP after approval (see DoD Source Selection Procedures paragraph 1.4.2.2.4). Subsequent proposed changes to the source selection organization, to include the SSAC when used, shall be documented in an addendum to the SSP (see 1.4.4.2.1.2.2). The addendum requires SSA approval unless the SSA delegates this responsibility to the SSEB Chairperson within the SSP.

2.3 Develop the Request for Proposals

2.3.1 Tailorable RFP [Section L templates](#) and [Section M templates](#) are available in Part 5315 of the AFFARS Library.

2.3.1.1 Cost or Price. The analysis technique(s) identified in [FAR 15.404](#), as supplemented, to be used to evaluate the proposed cost or price shall be included in the evaluation criteria (Section M or equivalent provisions of the solicitation).

2.3.1.1.1 When used, the Most Probable Cost (MPC) estimate is the government estimate of the costs to acquire specified goods and/or services based on each offeror’s proposed approach. The MPC is based upon an analysis of each offeror’s unique proposal in accordance with [FAR 15.404-1](#). Define all the components that make up the aggregate government MPC and specify them in Section M (or equivalent provisions) of the solicitation.

2.3.1.1.2 For ACAT programs, the Deputy Assistant Secretary (Contracting) (DAS(C)) will approve any use of Most Probable Life Cycle Cost (MPLCC) as an evaluation criterion. The SSEB Chairperson, with the assistance of the PCO, will prepare the request for approval by including a justification statement addressing the rationale and methodology for using MPLCC as an evaluation criterion. Such request will be submitted to SAF/AQC (safaqc.workflow@pentagon.af.mil) 10 working days prior to convening the acquisition strategy panel (ASP) or the staffing of the LCMP/AP, whichever occurs first.

2.4 Release the Request for Proposals (*No AF Text*)

Chapter 3

Evaluation and Decision Process

3.1 Evaluation Activities (*No AF Text*)

3.2 Documentation of Initial Evaluation Results

3.2.1 Prepare a discussion EN for potential release during discussions (see paragraph 3.4) whenever a proposal aspect does not clearly meet requirements or is unacceptable because the proposal is not clear regarding the issue(s). The discussion EN will be released only if the offeror is retained in the competitive range.

3.3 Award Without Discussions

3.3.3 The PCO shall obtain contract clearance approval in accordance with [AFFARS 5301.9000\(e\)\(1\)](#) prior to the SSA making the decision to award without discussions.

3.4 Discussion Process

3.4.1 Through discussions, Government evaluators obtain the necessary information from offerors within the competitive range to resolve outstanding issues with the proposal.

3.4.2 The SSEB shall prepare the competitive range briefing, if one is required by the SSA. At the discretion of the SSA, these charts with supporting narratives, note pages or scripts (suitable to serve as the official record of the SSEB proceedings during the source selection) may be used to document the competitive range determination in lieu of generating a separate determination document.

3.4.3 The PCO may provide offerors in the competitive range with their own initial ratings and results of their own initial pricing analysis or total evaluated price. When interim ratings and pricing analysis are provided prior to requesting final proposal revisions, the ratings shall reflect the results of discussions with the offeror. PCOs may use the actual briefing charts used to brief the SSA as a method to provide these ratings/price analysis to offerors.

3.4.3.1 When addressing adverse past performance with an offeror, the names of individuals who provided information about the offeror's past performance shall not be identified.

3.5 Final Proposal Revisions

3.5.1 The PCO shall obtain contract clearance approval in accordance with [AFFARS 5301.9000\(e\)\(2\)\(i\)](#) prior to submission of all material (e.g., Pre-FPR briefing) to the SSA to obtain approval for releasing the FPR request.

3.6 Documentation of Final Evaluation Results

3.6.1 A Proposal Analysis Report (PAR) will be used to document the results of the SSEB's evaluation. The PAR shall be prepared by the SSEB and signed by the SSEB Chairperson and PCO (and the SSAC Chairperson if an SSAC is used). A decision briefing, prepared by the SSEB, will generally be conducted whenever the SSA is other than the PCO. A tailorable [PAR template](#) and [decision briefing templates](#) are available in Part 5315 of the AFFARS Library.

3.6.2 The PAR will include, if applicable, any minority opinion(s).

3.7 Conduct and Documentation of Comparative Analysis

3.7.3 When the SSEB is specifically requested by the SSA (or required by the SSP) to conduct a comparative analysis of proposals and make an award recommendation, the analysis and recommendation shall be documented in the Comparative Analysis Report and Award Recommendation and presented to the SSA. A tailorable [Comparative Analysis Report and Award Recommendation template](#) is available in Part 5315 of the AFFARS Library.

3.8 Best-Value Decision

3.8.1 The PCO shall obtain contract clearance approval prior to the SSA making a source selection decision in accordance with [AFFARS 5301.9000\(e\)\(2\)\(ii\)](#).

3.9 Source Selection Decision Document

3.9.1 A tailorable [Source Selection Decision Document \(SSDD\) template](#) is available in Part 5315 of the AFFARS Library.

3.10 Debriefings (*No AF Text*)

Chapter 4

Documentation Requirements

4.9 The rationale and justification for evaluation results and assignment of interim ratings will be fully, completely, and contemporaneously documented and included in the source selection file. This documentation includes the evaluation worksheets and summaries and is in addition to information regarding the final evaluation results and ratings to be documented in the PAR. The PAR and decision briefing charts shall be included in the source selection file. Tailorable [SSEB evaluation templates](#) including specific [past performance evaluation team document examples](#), a [PAR template](#) and [decision briefing templates](#) are available in Part 5315 of the AFFARS Library.

Chapter 5

Definitions

5.23 Proposal Analysis Report (PAR). The PAR is the narrative report prepared by the SSEB that fully documents the results of the evaluation of each proposal. A tailorable [PAR template](#) is available in Part 5315 of the AFFARS Library.

Chapter 6

Mandatory Air Force Source Selection Training

6.1 Purpose

This Chapter establishes the mandatory Air Force source selection training process for acquisition/source selection team members conducting applicable competitive acquisitions and standardizes the approach in which these individuals receive the aforementioned training. The goal is to ensure that acquisition/source selection teams benefit from a learning environment that equips them with a sound foundation for the application of acquisition/source selection principles.

6.2 Responsibilities of Senior Contracting Officials (SCO)/Senior Center Contracting Officials (SCCO)

SCOs/SCCOs shall ensure that a source selection training program is in place for all applicable acquisitions as required in paragraph 1.3 of the DoD Source Selection Procedures and shall ensure that a training manager/Point of Contact (POC) is designated. The SCO or SCCO shall ensure that individual(s) are designated to be trainer(s) and may include individuals assigned to the local Acquisition Center of Excellence (ACE) or from within an acquisition organization. Trainers should have prior source selection experience, but as a minimum, designated trainers shall be working in an acquisition position. The SCO or SCCO shall ensure that the designated trainers have the requisite experience and capability to successfully conduct source selection training. It is highly desirable that institution of a rotational plan be considered for trainers to facilitate sharing of recent source selection experience.

Provide the name(s) of the training manager/POC and trainer(s), to the SAF/AQC Field Support Team (safaqcp.workflow@pentagon.af.mil) immediately upon designating the training manager/POC or trainer(s) or when removing/replacing a previously designated training manager/POC or trainer.

6.3 Required Training for Designated Trainers

All designated trainers are required to receive “train-the-trainer” training sponsored by SAF/AQC prior to conducting any training in accordance with this procedure. SAF/AQC may conduct “train-the-trainer” training en masse or on an as needed basis. Requests for “train-the-trainer” training shall be submitted through the Source Selection Training Request Tool as discussed in paragraph 6.5. It is highly recommended that the training manager/POC also receive the “train-the-trainer” training upon assumption of their duties.

6.4 Acquisition/Source Selection Team Training

6.4.1 Conducting Training Sessions

Training sessions shall be conducted with acquisition/source selection team members during the course of an applicable acquisition. Two training sessions have been identified to assist the acquisition/source selection teams; these two sessions are referred to hereafter as Phase I and Phase II training. Acquisition/source selection team members requiring Phase I and Phase II training include all team members, functional team leads and the SSEB Chair. Specialized training sessions have also been identified to assist price/cost analysts, the SSA, the SSAC Chair, and SSAC members.

The training is most effective when conducted on a just-in-time (JIT) basis corresponding to the applicable phase of the acquisition the acquisition/source selection team is working on. Consequently, and at a minimum, the Phase I training session shall occur during the acquisition planning phase, and is most effective prior to establishment of evaluation criteria. The Phase II

training session shall be accomplished prior to evaluation of proposals. It is highly recommended that the Phase II training session occur during the time between formal solicitation issuance and receipt of proposals.

The length of training varies according to the complexity of each acquisition and experience of the acquisition/source selection team. Although the SAF/AQC established modules are based on spending an average of one day covering Phase I training material and two days on Phase II training material; the actual time spent discussing the material in the training session will depend on the acquisition size and complexity and the team's experience (i.e., for simple/low dollar acquisitions the training may not take as long as for a complex acquisition).

Ideally, the training will be presented in a manner which facilitates open discussions and sharing of ideas, with lessons-learned and best practices interspersed throughout to enhance learning objectives, as opposed to being presented as a briefing. The reference to "training" encompasses not only a workshop or practical/hands-on learning environment but may include on-the-job meetings or discussions where tenets of this training process are discussed for specific acquisitions or source selections. Further, there may be instances where the content of this training occurs at various times during an acquisition but not less than the minimum occurrences or outside the windows discussed in the paragraph above. The trainer's lesson plan, referenced in paragraph 6.4.2, discusses various opportunities in which to conduct Phase I or Phase II training. For those organizations with a few source selections a year and/or those who would like to enhance their training program, SAF/AQC Field Support Team will, upon request, assist with conducting training. Requests shall be submitted through the Source Selection Training Request Tool as discussed in paragraph 6.5.

6.4.2 Training Content

Trainers will use the SAF/AQC established training module topics. The trainer should draw upon his/her experiences in order to bring the material "closer to home" whenever possible, and make use of mock scenarios and practical exercises to illustrate points. Because of the importance of the subject matter, it is highly recommended that a legal subject matter expert lead the discussion on Ethics, Procurement Integrity, and Conflicts of Interest. When using guest trainers for a specific subject matter/topic, the guest trainer need not receive the "train-the-trainer" training.

To acquaint trainers with the learning objectives and the philosophy of the training approach, each training module is equipped with a lesson plan. Each lesson plan contains instructions for the trainers, ideas to effectively train the team, and designated mandatory material that shall not be omitted from the training module. Further, trainer's resource/reference material is provided. The resource/reference material contains background information with appropriate regulatory references to assist the trainer in providing informed training. The lesson plans and resource/reference material shall not be disseminated to the trainees.

6.4.3 Advance Preparation

Effectiveness of the training experience is enhanced with increased acquisition/source selection team member knowledge. Accordingly, trainers should provide prospective acquisition/source selection teams with advance preparation instructions. For example, trainers may recommend that acquisition/source selection team members familiarize themselves with certain aspects of the source selection process prior to receiving the Phase I and Phase II training outlined in this procedure. Defense Acquisition University (DAU) offers continuous learning modules which are useful in this regard (<http://icatalog.dau.mil/onlinecatalog/tabnavcl.aspx>). Suggested DAU courses include [CLC 004](#) (Market Research), [CLC 007](#) (Source Selection), [CLC 132](#) (Organizational Conflicts of Interest), and [CLM 049](#) (Procurement Fraud Indicators), among others.

For Phase I training, it will be particularly useful to the acquisition/source selection team if they are able to incorporate learning points directly into their documents. For example, a valuable practical exercise may be for the team to use results of their specific risk assessment and market research to outline technical subfactors considered appropriate for inclusion in the solicitation. Recommend the team bring their working documents for discussion and editing during these training sessions.

For Phase II training and to have the most beneficial and effective learning experience, recommend the source selection team review the approved source selection plan and the solicitation prior to attending the training.

6.5 Training Material Repository

Access to the Source Selection Training Request Tool, Training Modules, Trainer's Lesson Plans, and Resource/Reference Material is limited to the SCO/SCCO's designated training manager/POC and trainers. SAF/AQC will provide the link and instructions for use of the training material repository to designated training managers/POCs.

6.6 Training Certificate, Survey and Continuous Learning (CL) Points

For acquisitions \$10M and above, trainers shall provide the SAF/AQC Field Support Team (safaqcp.workflow@pentagon.af.mil) with the date(s) of the training and a list of attendees (trainee name, organization, email address, and telephone number) within 3 days of training completion. An electronic survey will be sent to Phase I and Phase II training attendees for the purpose of improving future training. Trainers will be provided survey feedback. SAF/AQC will provide training attendees a certificate of completion.

For acquisitions below \$10M, it is recommended that trainers implement a survey process and furnish the Phase I or Phase II training attendees with a locally generated certificate of completion.

Attendees are eligible to receive 6 CL points for each full day of instruction, 3 CL points for any half day of instruction, and 1 CL point for any 2 hours or less of instruction. CL point eligibility and any limitations are determined by the SCO/SCCO designated training manager/POC.

Appendix A

Lowest Price Technically Acceptable Source Selection Process

(No AF Text)

Appendix B
Debriefing Guide
(No AF Text)

Attachment 1
Source Selection Non-Disclosure Agreement (NDA)

Name (print): _____ **Grade/Rank:** _____

Job Title: _____ **Organization:** _____

Source Selection: _____
(or insert title of position, if this form is used as an Annual NDA IAW [AFFARS 5303.104-4](#).)

1. I acknowledge I have been assigned to the source selection indicated above. I have been briefed orally by _____ and as such, am knowledgeable of Subsection 27(a) of the Office of Federal Procurement Policy Procurement Integrity Act, 41 U.S.C., Section 423, and FAR 3.104. I am aware that unauthorized disclosure of source selection or proprietary information could damage the integrity of this procurement and that the transmission or revelation of such information to unauthorized persons could subject me to prosecution under the Procurement Integrity Laws or under other applicable laws.
2. I do solemnly swear or affirm that I will not divulge, publish, or reveal by word, conduct, or any other means, such information or knowledge, except as necessary to do so in the performance of my official duties related to this source selection and in accordance with the laws of the United States, unless specifically authorized in writing in each and every case by a duly authorized representative of the United States Government. I take this obligation freely, without any mental reservation or purpose of evasion and in the absence of duress.
3. I acknowledge that the information I receive will be given only to persons specifically granted access to the source selection information and may not be further divulged without specific prior written approval from an authorized individual.
4. If, at any time during the source selection process, my participation might result in a real, apparent, possible, or potential conflict of interest, I will immediately report the circumstances to the Source Selection Authority.
5. All personnel are requested to check the applicable block(s):
 - I have submitted a current [OGE Form 450](#), Executive Branch Confidential Financial Disclosure Report, as required by [DODD 5500.07](#), Standards of Conduct.
 - I am not required to submit an OGE Form 450.
 - I have submitted a current [OGE Form 278](#), Public Financial Disclosure Report, as required by [DODD 5500.07](#), Standards of Conduct
 - I am not required to submit an [OGE Form 278](#).
 - I am a non-government employee. I have signed a proprietary information non-disclosure agreement that has been included in the contract between my firm and the government that precludes me from divulging any proprietary data to which I may gain access during the source selection. I have submitted (or will submit) a Conflict of Interest Statement and documentation to the Contracting Officer indicating my personal stock holdings prior to accessing source selection information.

Signature: _____ **Date:** _____

Debriefing Certificate

I have been debriefed orally by _____ as to my obligation to protect all information to which I have had access during this source selection. I no longer have any material pertinent to this source selection in my possession except material that I have been authorized in writing to retain by the Source Selection Authority. I will not discuss, communicate, transmit, or release any information orally, in writing, or by any other means to anyone after this date unless specifically authorized to do so by a duly authorized representative of the United States Government.

Signature: _____ **Date:** _____

Attachment 2
Conflict of Interest Statement

SOURCE SELECTION

(Insert acquisition name)

Please review the list of prime contractors and their subcontractors who are offering proposals in response to the Request for Proposal (RFP) for the acquisition identified above with the Procuring Contracting Officer (PCO). After reviewing the list, check the appropriate boxes, fill in the information requested, and sign:

I certify that neither I nor my immediate family, to the best of my knowledge, possess any financial interest whatsoever in any company, parent or subsidiary, which is proposing on the acquisition identified above now being considered by the Source Selection Evaluation Board (SSEB) of which I am a member or advisor. Should any company in which I or my immediate family has a financial interest submit a proposal to my source selection team, I will reveal immediately such interest to the SSEB Chairperson and the PCO. (Please note that ownership of a financial interest in a company described in this paragraph which interest is valued at less than \$15,000 is not disqualifying and need not be reported on this form. The \$15,000 value is additive among your spouse and minor children, if any.)

OR

I do possess a financial interest in a company that is proposing on or is in a way involved in the acquisition identified above now being considered by the Source Selection Evaluation Board (SSEB) of which I am a member or advisor. (If you have checked this box, please provide a description of your financial interests on the reverse side of this form.)

I further acknowledge my obligation to disclose any friendships; family or social relationships; past, present, or planned employment relationships, or any other type of relationship, such as housing or transportation arrangements, which might be perceived as compromising my independent judgment in connection with this Source Selection. (Please make any disclosures on the reverse of this form.)

Name (print): _____

Organization: _____

Phone: _____

Signature: _____

Date: _____

Attachment 3
Source Selection Information Coversheet

**** See FAR 2.101 and 3.104 ****

**FOR OFFICIAL USE ONLY
SOURCE SELECTION
INFORMATION**

**THIS IS A COVERSHEET
DO NOT DEFACE**

Only individuals who have executed a source selection information briefing certificate for the source selection associated with the attached document(s) may have access to the source selection information contained therein.

**SAFEGUARD AT ALL TIMES
U.S. GOVERNMENT INFORMATION ATTACHED**

**FOR OFFICIAL USE ONLY
SOURCE SELECTION
INFORMATION**

**** See FAR 2.101 and 3.104 ****

PART 5307
Acquisition Planning

[Revised 3 May, 2011]

SUBPART 5307.1 — ACQUISITION PLANS

5307.104 General Procedures

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(S-90)(a) Source Selection Training. AFFARS MP5315.3 Source Selection discusses the requirements for acquisition/source selection teams conducting competitive acquisitions to have source selection training during the acquisition planning phase.

(S-91)(a) Solicitation Release

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