

CHECKLIST OF COMMON MISTAKES

Statement of Work (SOW)

- Has the appropriate content been accurately placed into the required format described in [Attachment 3](#) of the 'Assure' Task Order Guidelines?
- Ensure that Paragraph 5 contains the 'Assure' Task Areas being used, as described in Chapter 1 of the 'Assure' Task Order Guidelines.
- Ensure that Paragraph 6 tasks or performance requirements are within the contract scope ('Assure' Task Areas).
- If meetings and conferences are specified, ensure that they are clearly defined in the SOW and that the estimated costs for such meetings and conferences are included in the IGCE.
- If performance necessitates contractor travel, list the locations, duration and number of trips in Paragraph 7 of the SOW.
- State the period of performance as the number of calendar days after TO award unless the tasking is inextricably linked to an event or date.
- Ensure that the Delivery Schedule contains outcome-based deliverables (not just management plan or status reports).
- Ensure that the Delivery Schedule specifies due dates (not "as required," "TBD" or "at Government request"). Acceptable specifications include:
 - ✓ Number of calendar days after TO award
 - ✓ Number of calendar days after TO award (i.e., a date range)
 - ✓ Number of calendar days prior to/after (event)
- Ensure that Government-furnished documents are available. If available at a web site, list the URL here; if not, obtain electronic copies so that the information can be released concurrent with the task order award.
- Ensure that any labor categories that are considered key are identified in the "Other Pertinent Information or Special Considerations" paragraph if "key personnel" is an evaluation criteria.
- Ensure that any package submitted as a task order modification does not contain "significant" new work and/or "significant" additional funding.
- Ensure that a package submitted as a task order modification includes a SOW or PWS that is marked with [strikethroughs](#) and [underlines](#) to indicate changes.

Independent Government Cost Estimate (IGCE)

- Provide an addendum sheet to explain Other Direct Costs (ODCs), such as hardware, software or travel.
- Ensure that the IGCE figures for ODCs are traceable to a requirement in the SOW.

Funding

- If DISA-funded, has the package been released by the RMO and certified by the Accounting Office?
- If this is a non-DISA package, has funding has been certified?
- Ensure that the funding document (MIPR) indicates a "Funds Expiration Date."
- Ensure that the funding document is complete in accordance with the requirements of the 'Assure' Task Order Guidelines (see Chapter 3).

HELPFUL HINTS

- Ensure that you have completed the mandatory Task Monitor (TM) training. The "COR Mentor Course" is one of the approved training courses available, and it can be accessed at <http://www.faionline.com>. If training has already been completed, remember that you must take an annual refresher course (*DISA Customers Only*) (see Chapter 1, Paragraph 15 of the 'Assure' Task Order Guidelines).
- If you are a non-DISA customer, ensure that you have followed your own Agency's policy concerning TM training requirements.
- In order to adequately evaluate competitive proposals, set up an evaluation panel. The size of the evaluation panel should reflect the dollar value and complexity of the requirement. The minimum recommended size of an evaluation panel is three (3).
- Set up a time and place for your evaluation to take place. Technical proposals can be either oral or written.
- Oral Proposals
 - ✓ Set a time limit for each presentation.
 - ✓ Ensure that you have scheduled a conference room that is conducive to oral presentations.
 - ✓ Ensure that audio/visual equipment is available and operational.
 - ✓ Schedule breaks and lunch between presentations.
 - ✓ Prepare a standard set of questions to be asked of each Offeror.
- Written Proposals
 - ✓ Decide whether the evaluation panel will get together on a specific date/time to review written proposals or if the evaluation panel members will evaluate on their own time.
 - ✓ If evaluation panel members are evaluating on their own time, provide a due date that their evaluations must be completed.
 - ✓ Develop a rating scheme for the evaluation criteria (i.e. numerical (1-5, 1-10); colors (green, yellow, red); etc.). The rating scheme must be exactly the same for each Offeror and each type of presentation.
 - ✓ Provide the evaluation members an advance copy via e-mail the SOW (or PWS), evaluation criteria and the weights associated with the criteria (recommend some type of spreadsheet). Mark the documents "Source Selection Sensitive" and ensure that the panel members are aware of proper handling procedures.
 - ✓ Tally the ratings and prepare the Selection Recommendation Document (SRD), [Attachment 5](#) to the Task Order Guidelines.
- The SRD is used to debrief the successful and unsuccessful Offerors.
 - ✓ Successful Offeror. Check the recommended prime contractor and provide a short justification based on the ratings to clearly indicate why this vendor was chosen.
 - ✓ Unsuccessful Offeror. Prepare a short justification for each unsuccessful Offeror explaining why they were NOT chosen.
 - ✓ The SRD must include justifications for the award and for the non-successful bids. The KO requires that the evaluation scoring documentation be placed in the official 'Assure' contact files.
 - ✓ Send the SRD and the evaluation scoring to the Contracting Officer (KO).