

HELPFUL HINTS

- Ensure that you have completed the TM training (COR Mentor) located at <http://www.faionline.com> or if already a TM that you annually take the refresher course. (*This is for DISA Customers Only*)
- If non-DISA ensure that you have followed your Agency's policy on TM training requirements.
- Set up an evaluation panel. The size of the evaluation panel should reflect the dollar value and complexity of the Task Order. Minimum size of an evaluation panel is three (3).
- Set up time and place for evaluation to take place. Technical proposals can be either written or oral.
 - Oral Presentation:
 - Set a time limit for each presentation.
 - Ensure that you have scheduled a conference room that is conducive to oral presentations.
 - Ensure audio/visual equipment is available and operational.
 - Schedule breaks and lunch(s) between presentations.
 - Prepare a standard set of questions to be asked of each offeror.
 - Written Presentation:
 - 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 have a due date for the evaluation to be completed.
- Develop a rating scheme for the evaluation criteria (i.e. 1-5, 1-10, green/yellow/red, etc.) The rating scheme should be exactly the same for each offeror and each type of presentation.
- Provide to the evaluation members an advance copy via email the SOW, 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 know proper handling procedures.
- Tally ratings and prepare the Selection Recommendation Document (SRD)
 - Selection Recommendation Document is used for debriefings for the successful and unsuccessful offerors:
 - Successful Offeror: Check the recommended prime contractor and provide a short justification based on the rating on why they were chosen.
 - Unsuccessful Offeror: Prepare a short justification for each unsuccessful offeror as to why they were NOT chosen.

- Send SRD and the evaluation scoring to both the Contracting Officer Representative (COR) and Contracting Officer(s) (KOs). The SRD must include a justification for the award and for the non-successful bids. The KO requires the evaluation scoring documentation for their official 'I Assure' contact files.