

# SOURCE SELECTION ESSENTIALS: PLANNING, CONDUCTING, AND DEBRIEFING

## SYNOPSIS

In-depth knowledge is the key to success in the government's best-value source selection process. With in-depth knowledge, the acquisition team can plan and execute streamlined, innovative source selections that result in timely selection of high-quality contractors, and suppliers can design customer-focused, fully compliant proposals that clearly articulate their technical and cost solutions.

Source Selection Essentials:

- Planning
- Conducting
- Debriefing concentrates on practical application of the source selection process

This is a scenario-based class where students participate in all phases of the source selection process, including development of an Acquisition Plan, preparation of performance standards, instructions to offerors, evaluation factors, evaluation of proposals for a single scenario, and debriefings.

## LEARN

- Apply in-depth, practical knowledge of the best-value source selection process
- Apply your understanding and skills in buying or selling using best-value source selection
- Approach source selection based on "hands-on" experience through use of case studies, exercises, and problem solving
- Interact with your acquisition colleagues effectively and appropriately

*This course uses digital materials.*

## TOPICS

### **BUILDING A RESULTS-FOCUSED ACQUISITION TEAM**

- Characteristics of Results-Focused Acquisition
- The Acquisition Team
- Role of the Acquisition Team
- Attributes of High-Performance, Results-Focused Acquisition Teams
- Roles and Responsibilities of the Source Selection Team (SST)
- Key Challenges for the Government Acquisition System
- Managing Risk
- Four Stages of Acquisition Team Development

### **ACQUISITION PLANNING AND MARKET RESEARCH**

- What is Acquisition Planning?
- Benefits of Acquisition Planning
- Source Selection Issues in Acquisition Planning
- Lowest Price Technically Accepted (LPTA) vs. Trade-Off
- Acquisition Documents
- Determining Contract Type — Degrees of Risk
- Market Research
- Steps in the Market Research Process
- Uses and Benefits of Market Research
- Exchanges With Industry Before Receipt of Proposals
- Advisory Multistep Process

### **BUYING RESULTS THROUGH PERFORMANCE-BASED ACQUISITION**

- Three Types of Orientation in Defining Requirements and Managing Effort
- Benefits of Performance-Based Acquisition
- Statement of Objectives (SOO)
- Key Steps and Products in Performance-Based Acquisition
- Work Breakdown Structure (WBS)
- Work Statement and Performance Objective for Each Key Task
- Critical Performance Standards
- Inspection Method
- Incentives
- Putting It All Together

### **IDENTIFYING AND DEVELOPING DISCRIMINATING EVALUATION CRITERIA**

- Evaluation Criteria
- Role of Evaluation Criteria
- Evaluation Criteria Requirements
- Small Business Evaluation
- Weighting the Evaluation Criteria
- Key Considerations in Selecting Noncost Criteria
- Characteristics of High-Quality Criteria
- Quadrant Mapping
- Criteria Development Process
- Brainstorming
- Organizing Into Logical Groupings
- D-E-R
- Writing Clear Criteria Definitions
- The Source Selection Plan

### **PROPOSAL PREPARATION INSTRUCTIONS: THE KEY TO EFFICIENT COMPETITIONS**

- Proposal Preparation Instructions
- Role (Section L)
- Rule of Thumb
- Possible Methods for Receiving Proposal Information
- Oral Presentations
- Determining What Data are Needed
- Best Practices to Consider

### **WRITING CUSTOMER-FOCUSED PROPOSALS: THE CONTRACTOR'S PERSPECTIVE**

- Are Your Proposals Easy to Evaluate?
- Making Clear and Obvious Links Between Your Proposal and the Evaluation Criteria
- Best-Value Decisions are Built on Perceived Benefits
- Addressing Risk in Your Proposal Sections
- Using Your Executive Summary to Help The Source Selection Authority (SSA) Write the Decision Document
- Common Complaints From Evaluators

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