

23. TEPCHAIR

SUBJECT: TEP Chairperson Instructions for Evaluation of
Proposals Received in Response to ARS
Solicitation: _____
For (Brief Description Title) _____

TO: _____
Chairperson, Technical Evaluation Panel

FROM: _____
Contracting Officer

You have been designated to serve as Chairperson of the Technical Evaluation Panel (TEP) which will assist the Contracting Officer in the technical evaluation of proposals received in response to the subject solicitation for _____. This involves the determination of the merits of all aspects of the technical proposals.

Copies of the technical proposals will be provided to you and the panel members at the first technical evaluation panel meeting. These copies are Source Selection Sensitive. Procurement regulations require that no information shall be released. Source Selection Sensitive information includes such things as the number of proposals received, relative standing of offerors, technical acceptability, identity of offerors, or any information regarding technical approaches or management plans contained in the proposals.

The technical evaluation is generally accomplished in two phases as follows:

PHASE I:

- A. Receive proposals and meet with Contracting Officer or his/her representative to discuss procedures.
- B. Panel members review each proposal individually, to include:
 - 1. List strengths, weaknesses, and deficiencies;
 - 2. Provide narrative to support strengths, weaknesses, deficiencies;
 - 3. Score each proposal and rate risk factor; and
 - 4. Provide chairperson with questions that may arise and require resolution.

- C. After all panel members have evaluated one firm's proposal, the TEP shall come to a consensus (try not to average). Individual score may be changed by discovering information during the consensus by simply putting one line through the original score and writing in a new score with a note explaining the change (i.e., missed information on page ____, did not understand statement on page ____, etc).
- D. Chairperson provides the Contracting Officer with:
1. Individual rating sheets for each panel member along with a summary rating sheet displaying the evaluation scoring and the consensus scoring for each offeror.
 2. A Technical Evaluation Report with supporting rationale to include specific comments on the offeror's strengths, weaknesses, and deficiencies. The rationale should have a close correlation with the consensus rating given for the offeror. Any exceptions to the solicitation should be specifically identified and a statement of whether the exception exceeds or fails to meet the solicitation requirements should be provided.
 3. A list of "discussion/negotiation" questions.
 4. Offerors will then be placed into one of the categories defined below.
 - a. **TECHNICALLY ACCEPTABLE:** Indicates that the offerors proposal is acceptable and any deficiencies noted are not considered substantial or major in nature.
 - b. **TECHNICALLY UNACCEPTABLE:** Indicates that the offerors proposal is deficient to the extent that it would take a major rewrite (which is not permissible) in order to render it suitable for further consideration.
 - c. **COMPETITIVE RANGE RECOMMENDATION:** The TEP shall state whether they recommend an offeror to be included in the competitive range or not and why.
- E. After completion of all consensus scoring the Contracting Officer will provide the TEP Chairperson business proposals from technically acceptable offerors, for review and comment and a price/cost analysis.

PHASE II:

- A. TEP meets again to review responses to "discussion/negotiation" questions.

- B. Revise original technical evaluations, to include scores and supporting strength and weakness narratives, as necessary. **NOTE:** If a score is to be revised based on information discerned during review of the discussion questions, nothing in the original evaluation will be deleted! If a score changes, simply document the change and write in the new score and date when assigned. Do not change the original narrative of the strengths, weaknesses, and deficiencies, merely add new narrative justifying the change. It is suggested that evaluators use a different colored pen or pencil each time they are re-evaluated.

IT IS ESSENTIAL THAT THE EVALUATION RESULTS INCLUDE DETAILED AND SPECIFIC SUPPORTING INFORMATION FOR EACH PROPOSAL. This information will be utilized in making the final award selection and any future debriefings.

Upon completion of technical evaluations, the Chairperson is responsible for collecting all of the technical and business proposals that were provided during evaluations, any notes made by the TEP during evaluations, and all evaluation scoring sheets. These will be returned to the contracting office when the Final Revised Proposal has been evaluated unless other arrangements have been made.

ACKNOWLEDGMENT:

TEP Chairperson

Date

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