

Source Selection Process Improvement and Workforce Education/Training Concept

William Samper, Armando Sanchez
U.S. Army PEO STRI
Orlando, Florida
William.Samper.civ@mail.mil,
Armando.i.Sanchez10.civ@mail.mil

Ginger Rosacia
U.S. Army PEO STRI
Orlando, Florida
Ginger.Rosacia.civ@mail.mil

ABSTRACT

A Source Selection Advisory Team (SSAT) consisting of subject matter experts in program management, contracts, and engineering functional areas has been established by the Program Executive Office Simulation Training and Instrumentation (PEO STRI) Head Contracting Authority to simplify and implement uniform and consistent procedures for source selection acquisitions. Additional objectives include providing standardized educational training to the workforce to include pre-solicitation and source selection evaluation training for all Source Selection Teams' (SSTs) best value acquisitions. The SSAT concept is to centralize the development of improved source selection process artifacts, tools, instructions, communications with industry, and best practices and promote that knowledge and capabilities to the entire workforce. The SSAT is integrating common source selection principles early in the solicitation development process to influence the quality of future procurements by ensuring best practices are applied consistently to deliver both technical and cost best value training solutions. This paper provides an overview of the SSAT workforce education training concept, roles and responsibilities, process methodologies, and standards established. The paper will focus on the SSAT delivery of the workforce education training concept, describe how SSAT interfaces with the workforce and industry, and describe how to develop improvements within the source selection process from program initiation to award phase for all Army simulation, training, and instrumentation community best value source selections. This paper will also provide lessons learned, challenges encountered, metrics, best practices and way ahead for continuous improvement of the source selection process for Army simulation and training environment.

ABOUT THE AUTHORS

William Samper is the Lead PEO STRI Systems Engineer for the SSAT supporting continuous process improvement related to increasing the quality of best value acquisitions for PEO STRI's Army simulation, training, and instrumentation programs. His previous positions included lead engineer for the Combat Training Center Instrumentation System; Homestation Instrumentation Training Systems; Common Training Instrumentation Architecture and Live Training Transformation product line development efforts. Experience includes 27 years of project engineering and project management working with Department of Defense (DOD). He earned a Bachelor of Science (B.S.) in Electrical Engineering from the University of Florida.

Armando J. Sanchez is the PEO STRI Lead Project Director for the SSAT for the Acquisition Center at U.S. Army PEO STRI. Also, Mr. Sanchez has been the Lead System Engineer/Project Director for several years for the Ground Combat Tactical Trainers Program Manager at U.S. Army PEO STRI. He has over 20 years experience in modeling and simulation for training devices. This includes a variety of simulators already fielded and currently being used by the U.S. Army for Live, Virtual and Constructive training. Some of these simulators include, Precision Gunnery Trainers, Advance Gunnery Trainers for the Bradley Fighting Vehicle and the Abrams Tank. He received a B.S. in Civil Engineering from the University of Puerto Rico, and a Masters in Science in Computer Modeling and Simulation from the University of Central Florida in Orlando.

Ms. Rosacia is PEO STRI Contracting Officer and Branch Chief, SSAT was appointed by the Principle Assistant Responsible for Contracting (PARC) in support of the Head of Contracting Agency's (HCA) initiative to stand up and lead the first SSAT in order to build consistency and simplify the source selection process at PEO STRI. She leads the team consisting of senior, subject matter expertise in multiple disciplines, including contracts, program management, and engineering in the development of tools, curriculum, practical methods and best practices to improve the source selection process and communications with industry. Ms. Rosacia first obtained a Contracting Officer warrant in November of 2001. Her experience includes 27+ years as a contracting professional/Supervisor for both the Army and Navy in Research and Development, Production, Foreign Military Sales and Services contracts. She holds Bachelor's in Finance from University of Central Florida and a Masters in Business Administration from Webster University.

Source Selection Process Improvement and Workforce Education/Training Concept

William Samper, Armando Sanchez
U.S. Army PEO STRI
Orlando, Florida
William.Samper.civ@mail.mil,
Armando.j.Sanchez10.civ@mail.mil

Ginger Rosacia
U.S. Army PEO STRI
Orlando, Florida
Ginger.Rosacia.civ@mail.mil

INTRODUCTION

In January of 2009 the Head of Contracting Activity (HCA) and Program Executive Officer (PEO), Dr. James T. Blake, for the Program Executive Office for Simulation, Training and Instrumentation (PEO STRI) directed the Principle Assistant Responsible for Contracting (PARC), Mr. Joseph Giunta to improve the source selection process for competitive acquisitions. As the HCA and PEO, Dr. Blake was in a unique position and recognized that source selections across his five program offices were inconsistently run and lacked standard procedures. Results of a survey taken of the workforce revealed members of a source selection team would experience a significant learning curve from one program office to the next depending on knowledge and experience level of the Contracting Officer. In general, the survey indicated that all functional disciplines (contracts, engineering, program management, logistics, finance, etc.) felt that they lacked the knowledge, skills and experience necessary to perform efficiently. Also a common question from industry was, "Why are solicitations so different across the PEO?" Though our solicitations followed the general structure provided in the Federal Acquisition Regulation (FAR) and all Army and DoD regulatory policy and procedures, differences in format or use of unfamiliar language at the very least, impeded proficiency in proposal development. However, solicitations require well written evaluation criteria with correlation between the criteria, instructions and requirements, to enhance an offeror's ability to propose ideal solutions and lead to selection of the best value offeror. Poorly crafted solicitations can severely hamper the best value acquisition process results and puts the Government at significant risk of protest.

To meet the HCA's challenge and improve the source selection process the PARC established a Source Selection Advisory Team (SSAT) in March of 2011 to simplify the source selection process and implement uniform and consistent procedures for competitive acquisitions. This multi-disciplined team is comprised of senior level acquisition professionals from Contracting, Program Management and Engineering with a primary objective to provide standard educational training and assistance to build a workforce of subject matter experts in source selection. The team is structured in a staff position supporting the PARC who directly supports the PEO. Members are assigned on a rotational basis from 1-3 years. Once their rotation is up they go back into the workforce in their respective disciplines to impart their knowledge and skills gained while on the SSAT and ensure that the source selections are conducted consistently across the command. In this way the workforce can be "cross-pollinated" by a cross-functional team of experts increasing the proficiency of the workforce over time, Figure 1 Cross Pollination.

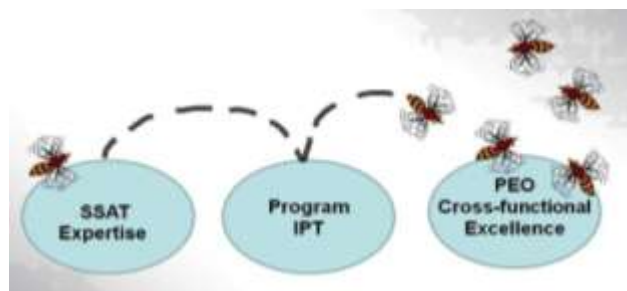


Figure 1. Cross Pollination

This paper explains the SSAT concept and the roles and responsibilities that support the workforce and the PEO. It discusses methodologies and techniques used to mentor, train and educate the workforce. The SSAT interfaces with

industry to address source selection process concerns. The paper describes how lessons learned and best practices that are implemented in real time to benefit source selection teams. Furthermore, the paper discusses collaboration with other government, defense, research and private industry organizations and stakeholders to improve communications and leverage learning capabilities, Figure 2 SSAT Stakeholder Environment. It will also discuss the challenges encountered, metrics and the way ahead for continuous improvement of the source selection process at PEO STRI.



Figure 2. SSAT Stakeholder Environment

SOURCE SELECTION PROCESS

The source selection process was established to provide a road map for the selection of a best value proposal. The SSAT approach to train and support the workforce is performed within the four phases of the Source Selection Process: Acquisition Planning Phase, Solicitation Phase, Evaluation Phase and Award Phase as depicted by the different colors in Figure 3 Source Selection Process. The process in accordance with PEO Acquisition Instruction (AI) AI-012B begins with a Procurement Planning Process when the Source Selection Team and acquisition strategy is established. The final award phase ends when the Source Selection Authority (SSA) selects a contractor for the award and the offerors are debriefed. The source selection process is needed to ensure the proper resources are identified, the correct events are conducted and solicitation documentation is prepared to support the evaluation and selection of the best value proposal. The source selection process ensures that the guidelines provided in the Competition in Contracting Act of 1984 (CICA) are followed for the purpose of increasing the number of competitors and increasing the savings through lower and more competitive pricing. The source selection process provides a consistent process that will allow for an increase in competition and will provide a fair opportunity for all the offerors while making sure that the Government selects a best value proposal at a reasonable price. The process includes events such as acquisition strategy, market research, preparation of the Independent Government Cost Estimates and the requirements documents. This process also ensures that requirements are consistent with current market research data and are given proper consideration in the preparation of the evaluation criteria.

The SSAT designed and developed two source selection training approaches that are centralized and mandatory for the workforce to include Pre-Solicitation Training and Source Selection Evaluation Training. Educating and training the workforce on the source selection process will enhance the process through standardization of best practices and improve the workforce quality of solicitations and best value proposal selection. The SSAT training is focused in all of these phases to improve the skills of the PEO STRI organization in source selections.

The objectives of the SSAT are in alignment with the goals for the PEO STRI organization which are: (1) Develop a workforce with expert level acquisition, technical and leadership skills; and (2) Promote and sustain excellence in the execution of contracting activities. The PEO STRI training portfolio is geared towards increasing the level of expertise within the workforce to achieve and sustain Excellency in the areas of: Support Decisive Action Operations, Integrated Training and Test Environment, Develop the Workforce and Execution of Contracting Activities. The training provided by the SSAT enhances the quality of the training portfolio for the organization. At

the same time it promotes the establishment of a consistent process and the use of common tools to simplify and accelerate the source selection process without compromising the quality of the product.

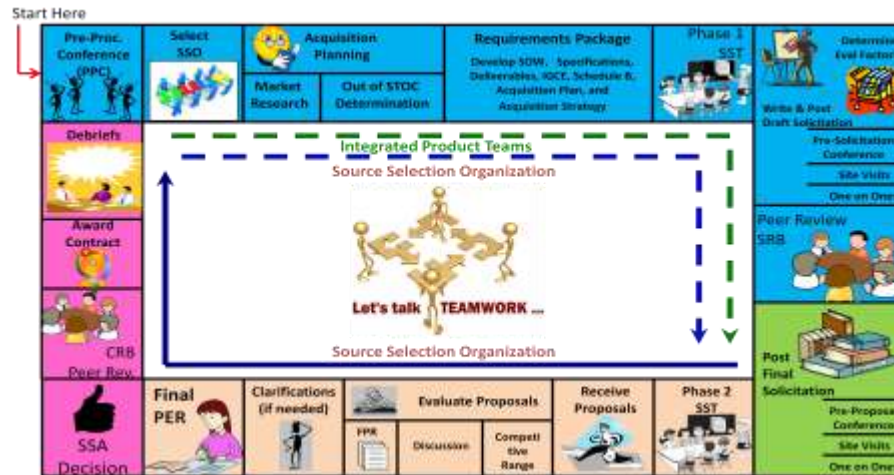


Figure 3. Source Selection Process

SSAT STRUCTURE AND METHODOLOGY

The SSAT provides subject matter expertise that aligns with the capabilities of a Government or Industry Source Selection Team (SST) whose main purpose is to support development of solicitations and advise the source selection organization of the evaluation processes for consistencies that mitigate award risks. Representatives experienced in contracting for and delivering major program acquisitions were selected from each of the main PEO STRI internal organizations in order to provide credibility as resource providers in the development of tools and training to the entire workforce. Each member of the team is independently empowered to evaluate processes relative to their functional expertise. The SSAT is comprised of the following representatives that provide subject matter expertise across the following functional areas:

- Contracting Officer leads the SSAT with expertise in the DoD Source Selection Process
- Project Director provides expertise in the program acquisition and management process
- Systems Engineer provides expertise in modeling and simulation capabilities and technical management processes
- Contracts Specialist provides technical expertise in the DoD contract administration

The team uses their own independent knowledge and experience of training system acquisition and DoD Source Selection Process regulations and instructions with the authority to creatively determine new standards, best practices, and tools. The standard practices are applied across the workforce to enable improvements in source selection processes that lead to quality products delivered in a timelier manner at affordable costs. The SSAT is a primary resource provider of best practices, training tools, and credible subject matter expertise whose goal is to achieve buy-in from workforce and program management offices in accepting the source selection standard training approaches and process improvements.

The SSAT supports the following processes associated with PEO STRI mission strategies and Better Buying Power 2.0 initiatives:

- Training Workforce delivers source selection process training and best practices to the entire workforce
- Project Team support provides guidance to source selection teams in development of solicitations, specifically writing evaluation criteria
- Customer Communications provides a single focal point of discussions and introduction of new ideas with industry and our Government stakeholders
- Lessons Learned capture improvements to specific source selection process areas
- Capture metrics to determine progress against meeting the SSAT objectives

The SSAT develops analysis tools and standard document templates that provide process methodologies for producing critical solicitation documents. The SSAT provides guidance on interpretation of Army Instructions, Policies and Regulations to the workforce. The SSAT provides the necessary communication mechanisms required to distribute information to the workforce and industry for training and process improvement purposes. The SSAT communicates with the following stakeholders: the acquisition workforce, industry partners, source selection teams, Source Selection Evaluation Boards, Information Assurance Security Office, Program Management Office, Engineering Support Group, Contracts, Logisticians, and external Government agencies.

Educating and Training the Workforce

There are several key points to the SSAT's training and education concept that facilitate improved performance by the workforce: a comprehensive training program, development of tools and training aids and the ability of the SSAT to mentor teams throughout the source selection process is provided. Teams are given source selection training in two phases. Phase 1 provides Pre-solicitation training as soon as the requirements have been identified and when beginning activities in acquisition planning. Phase 2 Evaluation training is delivered later in the source selection process just prior to the receipt of proposals.

Phase 1 training is a three hour class which covers all activities and other considerations required to develop the solicitation, such as market research, communication with industry, member roles and responsibilities, development of key discriminators and solicitation clauses, cost estimation and small business considerations. Additionally, since evaluation criteria highlights the Government's key requirements and establishes the parameters of the evaluation, Phase 1 training focuses on processes in identifying the significant areas of program risk and ensuring mitigation of that risk is captured in the evaluation criteria and can be properly assessed. Teams are taught the process of defining program risk areas as a valuable source of potential evaluation criteria. Using a technical discriminator toolkit the SSAT guides the class in the process of determination of true discriminators and development of clear and concise criteria. This interactive method of teaching enhances learning comprehension and has significantly reduced criteria development time from 3 months on average for experienced teams, down to 6 weeks in preparation time. More importantly, because all team members participated in the development of the evaluation criteria evaluators have a broader understanding of their specific requirements as they relate to the overall program objectives and the relative importance to the factors and subfactors. This results in a more cohesive team, increases the team's ability to conduct a thorough evaluation and improves the quality of their assessment.

Phase 2 Evaluator training is a three hour class which focuses on preparing the team for the receipt and evaluation of offerors' proposals. The SSAT provides this "Just-In-Time" training within a week of receipt of proposals to ensure maximum retention of knowledge and skills learned are utilized during evaluations. Some Phase 1 topics such as Roles and Responsibilities and Conflicts of Interest are reinforced in Phase 2 training, however, the primary focus is on conducting the evaluation and documenting evaluator assessments in accordance with the evaluation criteria. Unlike Phase 1 training which discusses pre-solicitation concepts and strategies in general terms, the Phase 2 evaluator training is tailored to each source selection team's specific solicitation best value continuum (Low Price Technically Acceptable, Trade-off). The source selection team is given a refresher on the terms and conditions of the solicitation and the basis for award to ensure a consistent understanding among evaluation board members. Specific emphasis is placed on a standard approach to writing the assessments in accordance with the evaluation criteria and the method for applying the rating definitions consistently across all offerors. The SSAT provides in depth instruction on analyzing proposals for strengths, weaknesses and deficiencies to determine the overall merit of offerors' proposals. Evaluators participate in practical exercises to reinforce their knowledge and skills and prepare them for the evaluation process.

The SSAT training concept enables development of specific education and training to augment the mandatory Phase 1 and Phase 2 source selection training for the workforce. For instance, to prepare the SSEB Chair for his/her role as the manager of the evaluation proceedings, the SSAT mentors the chair person and assists with development of the evaluation schedule and composition of the proposal evaluation report prior to Phase 2 training. This support is especially beneficial for those who have no prior SSEB Chair experience or who have not chaired an evaluation board in several years. This same type of individual support is also available to members of the Source Selection Advisory Council (SSAC) who only participate in source selections for the major acquisitions. Education and training is also tailored to meet the needs of our Acquisition Academy Interns and to address specific areas of

interest such as, services acquisitions, use of demonstrations, and source selection utilizing Lowest Price Technically Acceptable (LPTA) procedures.

The SSAT’s multi-disciplined team structure provides an added resource of subject matter expertise in contracting, program management and engineering to the entire workforce and fosters collaboration across the different directorates. For example, the SSAT took the lead in staffing a PEO level tactical action team to develop a journeyman level practicum for the workforce on developing source selection criteria. The curriculum was designed to address the specific knowledge and skills of the technical evaluators in defining program risk and transforming that risk into evaluation criteria that are measurable, reliable and relevant to the program requirements. This is an innovative approach which integrates risk assessment into the development of evaluation criteria. The SSAT provided dedicated resources and requisite knowledge to develop the practicum. The SSAT educates the workforce on the tools that have been developed and trains the workforce on how to use the tools with interactive exercises. Working one-on-one with individual teams, the SSAT is able to identify learning gaps as well as inefficient processes that impact the success of the IPT. The ability of the SSAT to implement new tools, policy and procedures relatively quickly ensures a standard approach is followed by all source selection teams and reduces the risk of litigation. Any best practices derived from the project teams are integrated into our training and education concept.

Source Selection Process Improvements

The SSAT has developed documentation templates to assist the workforce in developing demonstration plans for SSTs during the acquisition planning phase to support future assessment of technical approaches as part of the proposal evaluation process. The primary purpose of the templates is to create consistent uniform approaches in specific areas of the solicitation and to promote best practice processes within the program areas of significant risk. The common templates developed to date have been leveraged from multiple source selection samples and workforce stakeholder feedback. The demonstration plan provides a consistent process and best practice guidance for setup, execution, and assessment of live demonstrations during the evaluation process to mitigate proposal evaluation risks.

The Proposal Evaluation Report (PER) template was developed to achieve consistency in documenting the results of source selection trade-off evaluations. The PER provides a standard format with example analysis and best practice guidance for documenting the technical and cost evaluation results.

Technical Discriminator Worksheet

Spec or Para #/PWS	Requirement Description:	Trace the draft criteria and requirement to be assessed to a recommended Subfactor/critical topic Category	Can this requirement be effectively assessed through a higher level requirement? Yes or No (If yes, identify the higher level specification that will be assessed)	Does this requirement trace to a RFP or critical KSA training requirement? Yes or No	Does it have a quantitative threshold in specification or CDD/CPD? Yes or No	
Does it have an objective identified in the CDD/CPD or specification? Yes or No	If the threshold is exceeded, would this provide increased benefit for the program and would it be considered for a specification update if supported by the budget? Yes or No	Can the requirement be obtained through multiple proposed designs/approaches? Yes or No	Is this a moderate or high risk area in accordance with cost, schedule, and performance (schedule or cost driver)? State the identified risk area Yes or No	Is this critical to developing a successful design? Yes or No	Is this a candidate for a discriminator? Yes or No	Write draft evaluation criteria for section M describing how the requirement would be evaluated by the SSAT team.

The Toolkit provides mechanism for Source Selection Team to reach consensus on the prioritized key discriminators that will be used to develop section M criteria associated and linked with the Technical Requirements.

The Toolkit includes column to associate Factor/Subfactor definitions with the requirements and questionnaire to determine Key Specification and SOW requirements will be identified and inserted into first 2 columns of the worksheet (paragraph number and requirement description).

Figure 4. Discriminator Worksheet

Analysis tools have been developed to provide a consistent methodology for creating section M evaluation criteria and section L instructions to offerors. The Technical Discriminator Worksheet, Figure 4, was originally leveraged from NAVAIR and extended to enable a common process for establishing good discriminators based on the

identification of critical requirements and a questionnaire that produces rationale leading to written evaluation criteria. The section L and M correlation matrix tool provides a common process for synchronizing the evaluation criteria, instructions to offerors, and the technical requirements needed to enable consistency in assessing best value decisions for Army training acquisitions. This leads to defining quality criteria resulting in improved proposed training solutions. A consistency check matrix tool was developed to ensure fair and consistent processes are being followed in accordance with proposal evaluations and the assessment of strengths and weaknesses. The consistency check matrix reduces protest risk by ensuring assessments are made according to the criteria, eliminates redundancy, and increases fairness in assessing proposals. The analysis tools and documentation templates are usually leveraged and extended from existing source selections and standardized for the entire workforce.

Project Team Support

The SSAT is continually providing support and advice to all the Source Selection Teams (SSTs). This is done throughout the source selection process. It is very important to get involved as early as possible in the process to ensure that the SSTs have the right tools and understand the process from the beginning. If the SSAT is brought early in the process, they will provide advice on the program acquisition strategy to help decide the contract strategy (Trade-Off vs. LPTA). The SSAT meets with the SSTs needing support to prepare meaningful evaluation criteria and the standards needed for the proposal evaluation specifically geared towards the best value selection.

Another way the SSAT provides feedback is by having meetings with the SST during the evaluation process to ensure the teams are using the correct tools and procedures. The SSAT will provide guidance based on the best practices and the lessons learned captured from other source selections. This is particularly beneficial during the consistency check process and during the final write up of the PER. The SSAT can provide feedback on the way the PER is written which will minimize the possibility of having discrepancies in the document that eventually may lead to discussions or possible protests.

During the source selection process the SSAT acts as one of the independent reviewers during the peer reviews (Solicitation Review Board/Contract Review Board, SRB/CRB). During the SRB the SSAT ensures that the complete solicitations, specifically evaluation criteria, have no redundancies or inconsistencies. For the CRB, the SSAT makes sure that the contract documentation such as the PER and the Source Selection Decision Document (SSDD) does not have any inconsistency and that the evaluation criteria were applied consistently and fairly across all offerors. In order to ensure that any issues during the peer reviews are minimized, the SSAT must be involved during the preparation of the solicitation and during the final stages of getting the evaluation report prepared.

In addition the SSAT is also the key keeper of the source selection rooms available throughout the command. The source selection maintains control over these rooms; whenever a SST needs a room they need to send a request to the SSAT. The SSAT will assign a source selection room based on availability and the size of the SST. The SSAT will ensure the room is available and will ensure that the computer equipment is ready.

Customer Communications

Communication is an essential part in any team or IPT. In order for the SSAT to be effective and to ensure that the guidelines provided are applied, communication is very important. The SSAT has implemented different ways to communicate with the workforce, the individual source selection teams, and other organizations (internal and external) and with industry partners.

In addition, the SSAT recognized how important it is to communicate with the entire workforce. Therefore, on a regular basis the SSAT provides a briefing to the entire workforce on the progress and accomplishments of the SSAT. These briefings are very important since it provides a complete status of what the SSAT is working and what has been accomplished. It provides additional information introducing any lessons learned and new initiatives to improve training. Also, during these meetings the SSAT receives feedback from the workforce about the work done and the upcoming events/initiatives.

Another very important area of communication that the SSAT has identified is with the industry partners. The direct customers to the SSAT are the Source Selection Teams throughout the command; however, the source selection process and the results of the source selection process greatly affect the industry partner's ability to propose

solutions for the Army's requirements. During the early acquisition planning stage, industry is involved in providing information for the market research, and then they provide feedback to the draft documentation and the draft solicitation. Ultimately, industry spends a lot of resources to prepare and submit a proposal based on solicitation developed for a best value acquisition. During this time industry implements their own Proposal Preparation Process which is very well driven by the Government Source Selection Process. The SSAT is creating a Source Selection Improvement Group (SSIG) with industry to discuss and improve the source selection process. This working group will create different Focus Groups to discuss and find possible solutions to different source selection topics identified by the Government and Industry.

The SSAT has maintained an active role in other PEO boards and other IPTs (e.g. Engineering Standards Process Board) to ensure that the source selection process and all the documentation are applied consistently across the command. Also, there are active communications with IPTs from different external government organizations (e.g. NAVAIR) to capture external information on the source selection process that allows the SSAT to improve the process.

Lessons Learned

A Lessons Learned Process is one that crosses functional boundaries and allows an organization to learn from both its mistakes and its successes (it prevents us from repeating our mistakes and allows us to repeat our successes). The SSAT collects the lessons learned from each source selection team. A form is given to the source selection evaluation board chairperson to be distributed among all the members of the board. This lessons learned form is divided in the different phases of the source selection process: Acquisition Phase (pre-release of solicitation), Solicitation Phase, Evaluation Phase and Award Phase. This is purposely done to collect lessons learned from each individual phase. Each member of the source selection team will write the lessons learned throughout the process. At the end of the source selection the SSEB chairperson collects all the lessons learned for the SST members and consolidates them in a final lessons learned document and sends it to the SSAT. The SSAT schedules an After Action Review (AAR) meeting with the SST to discuss the lessons learned submitted and any additional information not captured in the lessons learned.

The SSAT to collect lessons learned during the discussion with the SST for the SRB/CRB peer reviews. After reviewing the documentation for the peer reviews the SSAT will have a meeting with the SST to discuss their comments. After these reviews the SSAT discusses and documents any lessons learned. Also, the SSAT conducts an analysis of the protests in the command and from this analysis the SSAT identifies possible lessons learned that will help mitigate those protests on future programs.

All of these lessons learned are documented and an implementation plan is identified. The resolution for each lesson learned is also documented to ensure we correct any mistakes and continue improving the process. For the most part, the lessons learned are incorporated into the training that the SSAT provides to the SSTs. The lessons learned help improve the training and provide real situations that show how the implementation of the lessons learned help improve the source selection process. These lessons learned are documented and updated on a regular basis to capture every SST lesson learned and resolution. The SSAT publishes these lessons learned into a SharePoint location for everyone in the organization to access. The workforce becomes aware of the lessons learned and can implement them in their daily activities specifically during source selections.

Metrics

The SSAT collects metrics to measure the level of education progress for the workforce understanding of the source selection process and the use of best practices and standards developed. The Best Value (BV) metric captures the solicitation award data resulting from source selection decisions that provide the highest technical evaluation ratings with the lowest cost for trade-off best value acquisitions. The metrics provide the ratio of solicitation approaches relative to product and service type contracts. In addition, metrics track the ratio of trade-off to LPTA type acquisitions. The ideal goal for the source selection process is to award the best technical approaches at an affordable cost as a method to predict the quality of the solicitations and quality of proposals submitted. The BV metric also captures the amount of funds obligated using the BV process with the associated quality of the solutions proposed.

Table 1. Best Value Metric
Competition Analysis - Best Value* (Tradeoff) vs. LPTA

	FY11	Based on no.	Based on \$\$	FY12	Based on no.	Based on \$\$	FY13	Based on no.	Based on \$\$
Tradeoff	19	83%	98.4%	11	69%	97.9%	7	70%	99%
Tech Superior	3	16%		7	64%		3	43%	58%
Low Price	6	32%		1	9%		0	0%	
TS & Low Price	6	32%		0	0%		4	57%	56%
1 Offer	4	21%		3	27%		0	0%	
LPTA	4	17%		5	31%		3	30%	1%
Total BV Awards	23			16			10		\$\$\$

*Note: Data does not include awards made under SAP, BAA, SBIR, GSA, FED Supply or strictly commercial buys.

The protest metric measures quality of the solicitation relative to the solicitation requirements and evaluation criteria written and the capability of the Source Selection Evaluation Board (SSEB) members to adequately determine and document a BV decision. The protest metric is a valuable source for identifying lessons learned used to improve the source selection process as issues associated with the solicitations and evaluation process are consolidated for analysis by the SSAT to provide solutions that improve processes and training. The SSAT tracks GAO protest decisions starting from FY10 to present time. The protest metric is captured using the following GAO decision categories: sustained, dismissed, denied, and withdrawn. The SSAT provides a higher priority on the lessons learned derived from sustained and dismissed decisions; however, the SSAT will review all of the protests submitted to GAO relative to PEO STRI acquisitions to determine the relevant lessons learned. The SSAT will allocate the protests and lessons learned captured to the following source selection process areas of interest: technical evaluation, solicitation compliance, costs, procurement integrity, and other. These areas are significant to improving source selection process and mitigating future protest and proposal risks. The Demonstration Plan Template is a good example of the protest lessons learned resolution.

INITIATIVES AND FUTURE CHALLENGES

There have been several initiatives borne out of the creation of the SSAT more than two years ago. Some were discussed earlier such as the L and M practicum for journeymen and the Source Selection Improvement Group with industry. Though the success of these two initiatives is yet to be determined, there is significant interest from government and industry to continue to develop methods for training and education to improve the process of source selection. As this is the mission of the SSAT, they continuously look for areas for improvement and methods for discovering and establishing best practices. Currently the team is developing a detailed guide on conducting LPTA best value procurements. The SSAT is available to assist other Government organizations without a formal training concept and who have requested PEO STRI's assistance in establishing a similar advisory team. The SSAT will continue to support the Office of Small Business in educating the small business community. The structure of the team fosters endless creativity on the part of the members who are practitioners each with more than 25 years of experience. Development of a course to train industry has also been discussed with partners.

Although there has been much positive feedback both internally and externally, there are challenges the team has faced in standing up this team and will continue to face. One of the biggest challenges will be the ability to acquire and maintain support from engineering and program management organizations. Although these organizations make up the majority of the evaluators in a source selection, the responsibility for training and educating the workforce in this area falls largely under the PARC and contracting organizations. In these austere fiscal times it may be more difficult for the Leadership to provide billets for the engineering and the program positions of the SSAT. The success of the SSAT is directly affected by the multi-functional representation from contracts, program management and engineering and the ability to form a cohesive team. Without subject matter experts from all disciplines the SSAT will lose credibility with the workforce and it will be difficult to implement standards and best practices. There is another key requirement to the success or failure of an advisory team such as the advisors individually must be esteemed by the workforce for their knowledge and experience. Workforce members of this caliber are generally

assigned to top programs or are in leadership a position which adds to the difficulty of acquiring the right talent. Overcoming this challenge will require commitment from the organization's senior leadership and their ability to gain support from higher headquarters.

CONCLUSION

In conclusion, the SSAT provides a single team for the organization with multi-disciplined subject matter expertise representative of a source selection team that focuses on the strategies and better buying power 2.0 goals to standardize processes and promote source selection efficiencies for the workforce. Benefits include reducing risk impacts to the source selection schedules, improving the quality of best value decisions and the quality of Army training solutions. Use of standard processes and tools increases workforce understanding of program critical requirements, evaluation criteria, evaluation rating process, and simplifies reaching team consensus. Management and program team buy-in associated with solicitation approaches and source selection decisions are critical to determining best value acquisitions. Consistency of assessments reduces protest risk and increases decision fairness. The SSAT education and training processes lead to best value decisions at affordable costs while reducing program risks. Efficiencies in the source selection process may lead to shortened source selection schedules resulting in reduced Government and industry costs.

REFERENCES

- Department of the Army PEO STRI, Acquisition Instruction (AI) 012B Source Selection Process, 30 October 2013, PEO STRI Acquisition Center website, retrieved from <https://striintranet.peostri.army.mil/parc/co/SSAT/Shared Documents/Acquisition Instructions/AI 012/Final AI-012B Source Selection Process 30Oct13.pdf>
- Department of the Army PEO STRI, Proposal Evaluation Report (PER) template, PEO STRI Product Support Group Systems Engineering Index website, retrieved from <https://striintranet.peostri.army.mil/psg/ed/SEdocs/SitePages/Home.aspx>
- Department of the Army PEO STRI, Demonstration Plan Template, PEO STRI Product Support Group Systems Engineering Index website, retrieved from <https://striintranet.peostri.army.mil/psg/ed/SEdocs/SitePages/Home.aspx>
- Department of the Army PEO STRI, Update to the Head of Contracting Activity (HCA) Philosophy on the Source Selection Process, 10 May 2013, PEO STRI Acquisition Center website, retrieved from <https://striintranet.peostri.army.mil/parc/igt/Shared Documents/Source Selection Information and Templates/HCA Source Selection Process Philosophy update 10 May 2013.pdf>
- Department of Defense (DoD), Army Source Selection Supplement (AS3) to the Department of Defense Source Selection Procedures, 21 December 2012, retrieved from [http://www.spd.usace.army.mil/Portals/13/docs/Small Business/Army%20Source%20Selection%20Supplement%20\(Dec%202012\).pdf](http://www.spd.usace.army.mil/Portals/13/docs/Small Business/Army%20Source%20Selection%20Supplement%20(Dec%202012).pdf)
- Department of the Army PEO STRI, Technical Discriminator Worksheet Revision 7, PEO STRI Acquisition Center website, retrieved from <https://striintranet.peostri.army.mil/parc/igt/Shared Documents/Source Selection Information and Templates/Source Selection Templates/TechnicalDiscriminatorWorksheet-Phase 1 Rev 7.xlsx>
- Department of the Army PEO STRI, Section L and M Correlation Matrix, PEO STRI Acquisition Center website, retrieved from <https://striintranet.peostri.army.mil/parc/igt/Shared Documents/Source Selection Information and Templates/Source Selection Templates/Section L and M Correlation Worksheet Example.xlsx>
- Department of the Army PEO STRI, Evaluation Consistency Check Matrix, PEO STRI Acquisition Center website, retrieved from <https://striintranet.peostri.army.mil/parc/igt/Shared Documents/Source Selection Information and Templates/Source Selection Templates/Evaluation Consistency Check Matrix v8 30 August 2013.xlsx>
- Department of the Army The Under Secretary of Defense, Better Buying Power 2.0: Continuing the Pursuit for Greater Efficiency and Productivity in Defense Spending, 13 November 2012, retrieved from [http://www.acq.osd.mil/docs/USD\(ATL\)%20Signed%20Memo%20to%20Workforce%20BBP%202%2000%20\(13%20Nov%202012\)%20with%20attachments.pdf](http://www.acq.osd.mil/docs/USD(ATL)%20Signed%20Memo%20to%20Workforce%20BBP%202%2000%20(13%20Nov%202012)%20with%20attachments.pdf)

U.S. Department of Labor, Competition in Contracting Act of 1984, 41 U.S.C. 253 Competition requirements, retrieved from

<http://www.dol.gov/oasam/regs/statutes/253.htm>

Department of the Army PEO STRI, Acquisition Instruction (AI) 003B Peer Reviews of Solicitations and Contracts for Supplies and Services, June 2013, PEO STRI Acquisition Center website, retrieved from

https://striintranet.peostri.army.mil/parc/igt/Shared Documents/Peer Reviews/Reference Documents/AI 003B Peer Reviews of solicitations and contracts for Supplies and Services_trng June 2013 DRAFT.docx

Department of the Army PEO STRI, Lessons Learned Form, retrieved from

<https://striintranet.peostri.army.mil/parc/igt/Shared Documents/Source Selection Information and Templates/Source Selection Lessons Learned/AI012 Rev B Lesson Learned Worksheet ENCL 4.docx>

Department of the Army The Under Secretary of Defense, Department of Defense Source Selection Procedures, 4 March 2011, retrieved from

<http://www.acq.osd.mil/dpap/policy/policyvault/USA007183-10-DPAP.pdf>