



*United States Department of*

**Health & Human Services**

Office of the Assistant Secretary for Preparedness and Response



# **Proposal Evaluation: Technical and Business**

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# An overview of the RFP Process



- 1) Post synopsis
  - ❖ FedBizOpps.gov
- 2) Post solicitation/RFP
  - ❖ FedBizOpps.gov
- 3) Answer questions submitted by potential offerors
  - ❖ All communication goes through the Contracting Officer (CO)
- 4) Amend solicitation/RFP
- 5) Receive & record proposals
- 6) Distribute proposals to TEP Team
- 7) CO reviews business proposals and begins cost and/or price analysis
- 8) Hold TEP
  - ❖ Score proposals against evaluation criteria
  - ❖ Develop technical score
  - ❖ Vote Acceptable/Unacceptable
  - ❖ TEP report to CO
- 10) CO Determines competitive range based on technical and cost
- 11) Hold discussions with offerors in competitive range. Notify those offerors excluded. Debriefings possible.
- 12) Review answers to questions
- 13) Negotiate, win-win solution
- 14) Might need a revised proposal
- 15) Request, receive, evaluate FPR (Final Proposal Revisions)
- 16) Make a source selection
- 17) Award contract



# What is a TEP?



- Technical Evaluation Panel (TEP)
- Purpose of a TEP:
  - A) To have technical (scientific) experts evaluate the merits of the technical proposal by identifying strengths and weaknesses and providing any questions to the CO.
  - B) Provide a TEP score and subsequent TEP report to the CO, so the CO can have all the information necessary to make a competitive range determination.
- A TEP is Required in all acquisitions expected to exceed \$500,000 (HHSAR 315.305) (FAR 15.305 – Proposal Evaluation).

Note: BAA TEPs do not result in a competitive range



# How does a TEP function?



- The responsibility of selecting the TEP members is made at least one level above the COR.
- TEP members must sign a Conflict of Interest Agreement (COI) and Non Disclosure Agreement (NDA) and return it to the CO.
- TEP members only see the technical proposal and normally have ample time to review the proposals.
- Prior to the TEP, the TEP members prepare their narrative comments on each proposal as they read, but do not score the proposals yet.
- All proposals returned to the TEP Chairperson and CO after the review.



# TEP 101



- TEP members will discuss and score each proposal on its own merit against the evaluation criteria (section M of the RFP) and will not compare the proposals to each other.
- There is an assigned Chairperson to the TEP, usually a voting member.
- The Contracting Officer normally facilitates the TEP, but is a non-voting member. CO is charged with ensuring the TEP is run on an equal playing field for all competitors and is in accordance with the SSP.
- The Chairperson and the CO decide if the TEP should be reconvened for subsequent proposal revisions.



# What do we review in business proposals?



- Compare the cost proposal to the SOW to determine if the proposal is reasonable from a programmatic perspective.
- Examine staffing requirements for the project and determine if the proposed number of personnel and skill mix is appropriate to meet the project objectives.
- Review personnel budget category to determine if the salary ranges proposed are reasonable.
- Determine whether the amount budgeted for supplies is reasonable.



# Business Review Continued



- Review travel costs to ensure that the destination(s) and the number of trips planned are necessary to complete the scope of work, and that the number of travelers is consistent with the trips' purposes.
- Determine if the project's objectives support equipment purchases or if other options should be considered, such as equipment rental or loan of government property. If purchasing equipment is the best option, consider what will happen to the equipment after it is no longer needed for the project or the project is terminated.
- Review the "other" cost category to determine whether these costs are consistent with the proposed work plan and are necessary to complete the approved work plan.
- Ensure that no unallowable costs, such as lobbying, entertainment expenses, etc., are included.



# Personnel Costs



- Personnel Costs are those cost for labor directly related to the project
  - Ensure the number of hours and skill mix is appropriate in comparison to previous/like projects and IGCE
  - Review that salaries are reasonable
  - Verify that salaries reported are the salaries actually paid (accounting/payroll system audit)
  - Review that salary escalation proposed is in line with profession/geographic area
- Fringe benefits costs are those costs for personnel employment other than employees direct income (sick/annual leave, retirement, FICA insurance, etc).
  - Ensure the direct labor base applied to the fringe benefit rate should correspond to the cost of the direct labor proposed
  - Verification that fringe rate is appropriate from cognizant audit agency (DCAA, NIH/DFAS, or if none AMCG desk audit)
- Indirect costs are a group of administrative costs that can not easily be direct costs
  - Ensure that indirect rates are in accordance with negotiated indirect cost rate agreements from (DCAA, NIH/DFAS, or if none AMCG desk audit)



# Travel and Equipment



- Travel
  - Number and destination of trip(s)
  - Traveler(s)
- Equipment
  - Total cost
  - Necessity
  - Quality of materials
  - Lease vs. buy analysis
  - Disposition



## Other Issues



- Review if offeror has an approved time keeping and purchasing system
- Ensure CAS compliance (full or modified)
- Other issues regarding verification of accounting systems, CAS compliance, cost segregation, etc. will be covered in the next presentation “Government Review/Accounting Systems” by Ayhan Akbel