

# SOURCE SELECTION PLAN

*Clues to Creating an Effective Procurement Roadmap*

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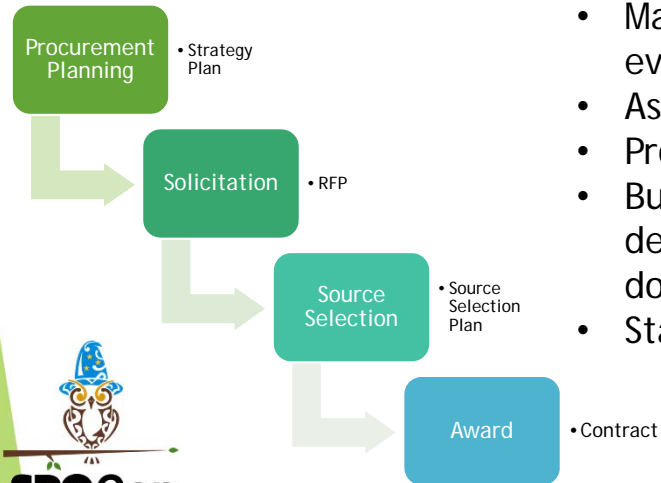


## What Is A Source Selection Plan (SSP)?

- ▶ What is a Source Selection?
- ▶ Describes how the source selection will be organized
- ▶ A guide on how proposals will be evaluated and analyzed
- ▶ The selection of sources for the procurement



## Helping us do what we said we'd do!



### Many Benefits!

- Maintains fairness of competitive evaluations
- Assures Consistency of thought
- Protects against Protests
- Builds reputation as an department that people want to do business with
- Stay off the front page!

## When To Use A Source Selection Plan

- ▶ When the procurement is for services over \$500K
- ▶ When the procurement is high-viz and/or high \$
- ▶ Coordinating a large team of Source Selection members



## Clues For Developing An Effective Source Selection Plan



## What should you include in the SSP?

- ▶ Source Selection Background and Objectives
- ▶ Summary of a Procurement Strategy
- ▶ Source Selection Organization
- ▶ Communications
- ▶ Evaluation Factors, Subfactors and Process
- ▶ Documentation
- ▶ Schedule of Events
- ▶ Securing Source Selection Materials



## Background and Objectives

- ▶ Program description
- ▶ What is being procured



## Summary of Procurement Strategy

- ▶ Pre-solicitation Activities (Market Research, RFI, Industry Day)
- ▶ Contract Type - (Fixed Fee, Indefinite Quantity, Labor Hour)
- ▶ Contract Period/Period of Performance
- ▶ Special Contract Requirements

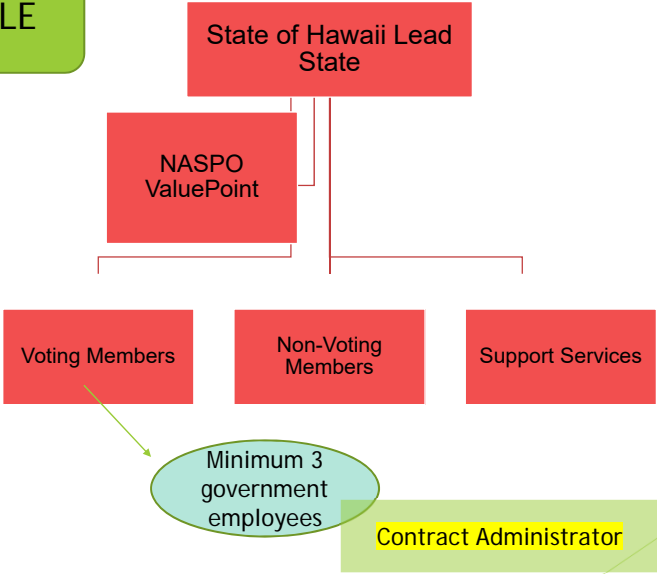


# Source Selection Organization and Responsibilities

- ▶ Authority, Board or Steering Committee
- ▶ Advisory or Legal Council
- ▶ Evaluation Team



## PASS EXAMPLE



# Responsibilities of Source Selection Team

## – PASS Example

- ▶ State of Hawaii, State Procurement Office (SPO)
- ▶ NASPO ValuePoint
- ▶ Hawaii Attorney General Office
- ▶ Evaluation Committee Voting Members
- ▶ Non-Voting Members
- ▶ Support Services

### Working Teams - Evaluation Criteria

Management Plan Team

Technical/Experience Team

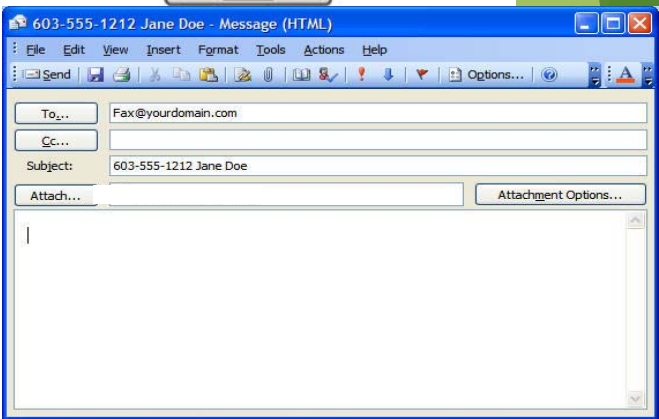
Past Performance Team

Cost Team



# Communications

- ▶ Process and Controls
- ▶ Types of Communication



# Types of Communication

- ▶ Internal Communication
- ▶ External Communication
- ▶ Types of Communication

Confidential: Source Selection Sensitive

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**Non-Disclosure Agreement**

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# Evaluation Factors, Subfactors and Process

- ▶ Solicitation Provisions
- ▶ Evaluation Process
- ▶ Reviews and Visits
- ▶ Electronic Source Selection Procedures



# Step by Step Evaluation Process

## - PASS Example

Step 1: Review by Working Groups

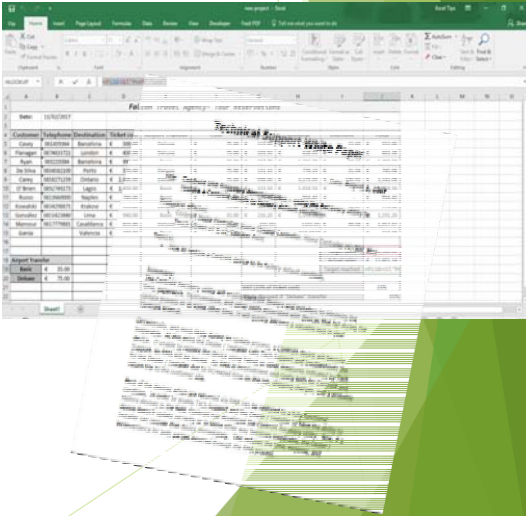
- ▶ Criteria 1 - Management Plan
- ▶ Criteria 2 - Technical/Experience
- ▶ Criteria 3 - Past Performance
- ▶ Criteria 4 - Price

Step 2: Preparation of White Papers

Step 3: Scoring by Voting Members

Step 4: Collective Judgement

Step 5: Final Scores



# Schedule of Events – PASS Example

	EVENT	ESTIMATED DATE		
1	PASS Team Training Day	February 23, 2017		
2	PASS Industry Day	February 24, 2017		
3	Develop Source Selection Plan	January 10, 2018, on-going		
4	Solicitation Released on HiePRO	March 21, 2018		
5	Pre-Proposal Conference	March 28, 2018		
6	Proposals Received	June 29, 2018		
	EVENT	ESTIMATED DATE	PERIOD	ACCUMULATIVE
7	SPO notate and review Proposals for completeness	July 5-6	2 Days	1W1
8	Kick-Off Meeting for the PASS Evaluation Committee (EC)	July 10	1 Day	1W1
9	Working teams read proposals, writes comments	July 11 to September 6	9 Weeks	10W9





## Securing Source Selection Materials

- ▶ How to manage documents
- ▶ Signing off



## Questions?

### Do you want a copy of the PASS SSP?

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