**FAIR OPPORTUNITY EVALUATION REPORT**

**Program Name/Requirement Title**

**FOPR/Order Number:**

*Note: Informational/directional text/placeholders printed in red text should be deleted.*

1. **INTRODUCTION.**
	1. **Description of Requirement.**

*(Include a description of the requirement: Mission Need, Scope, Contract Type, Period of Performance.)*

* 1. **Amendments**.

*(Include a description of each amendment issued.)*

1. **SELECTION METHODOLOGY.**

The Fair Opportunity Proposal Request (FOPR) was issued on XX Month XXX. The evalutation was conducted pursuant to Federal Acquisition Regulation (FAR) 16.505 and in accordance with (IAW) the basic contract ordering instructions, the Fair Opportunity Proposal Request (FOPR), and Acquisition Plan *(if required)*. *A Lowest Price Technically Acceptable (LPTA) or best value tradeoff selection process) was used*. The LPTA/tradeoff process is appropriate when \_\_\_\_\_\_\_\_\_\_\_\_\_. *(for LPTA: best value is expected to result from selection of a technically acceptable proposal with the lowest evaluated price. For tradeoff: the tradeoff process allows for tradeoffs between non-cost factors and cost/price and allows the Government to accept other than the lowest priced proposal or other than the highest technically rated proposal to achieve a best-value contract award.)*

***Example language for Sections 3 and 4 for LPTA:***

1. **EVALUATION FACTORS AND SUBFACTORS.**

Proposals were evaluated for acceptability, but not ranked using the non-price factors. In order to be considered awardable, there must be an acceptable rating in every non-price factor and/or subfactor. *(tailor as appropriate if there are no subfactors*).

The following factors, subfactors, and ratings were used:

1. Technical. (*Add subfactors and aspects, if used and include the order of importance).*

|  |  |
| --- | --- |
| **Subfactor** | **Description**  |
| 1. Management
 | *(Break out aspects, if used)* |
|  |  |

|  |  |
| --- | --- |
| **Technical Ratings** | **Definition** |
| Acceptable | Proposal clearly meets the minimum requirements of the solicitation. |
| Unacceptable | Proposal does not clearly meet the minimum requirements of the solicitation. |

1. Past Performance. *(Past performance is not required under FAR 16.5. If used, outline how it was conducted IAW the FOPR. All components are included in this template, but do not have to be used (i.e., relevancy or quality assessment, could be tied to technical acceptablility, etc.) Example language for all components being used:* The Past Performance evaluation resulted in an assessment of the Offeror’s probability of meeting the solicitation requirements. Offerors must receive a past performance rating of “Acceptable” to be eligible for award. The past performance evaluation considered each Offeror’s (and teaming partners’) demonstrated recent and relevant record of performance in supplying products and services that meet the solicitation requirements. In conducting the Past Performance evaluation, the Government reserved the right to use both the information provided in the Offeror’s Past Performance proposal volume and information obtained from other sources available to the Government such as the Past Performance Information Retrieval System (PPIRS), Federal Awardee Performance and Integrity Information System (FAPIIS), Electronic Subcontract Reporting System (eSRS), other databases, and interviews/questionnaires with Program Managers, Contracting Officers, Fee Determining Officials, the Defense Contract Management Agency (DCMA), and commercial sources.

All past performance documentation was evaluated to determine relevancy and recency. Each reference with past performance information obtained was given a rating of Relevant or Not Relevant. The definitions of the ratings follows:

|  |
| --- |
| **PAST PERFORMANCE RELEVANCY RATINGS** |
| **Rating** | **Definition** |
| RELEVANT  | Present/past performance effort involved similar scope and magnitude of effort and complexities this solicitation requires. |
| NOT RELEVANT  | Present/past performance effort involved little or none of the scope and magnitude of effort and complexities this solicitation requires. |

All past performance references, either provided by the contractor or obtained by the Government from the above mentioned sources, were also evaluated to determine recency. Each reference was given a rating of Recent or Not Recent. The definitions of these ratings follows:

|  |
| --- |
| **PAST PERFORMANCE RECENCY RATINGS** |
| **Rating** | **Definition** |
| RECENT  | Recent is defined as performance occurring within the last five years.  |
| NOT RECENT  | Not Recent is defined as performance occurring more than 5 years from the date of the issuance of the RFP.  |

The Government considered performance quality for all recent, relevant references. For each recent, relevant past performance reference reviewed, the performance quality of the work performed was assessed. The Government used the following quality levels when assessing recent, relevant efforts:

|  |
| --- |
| **PAST PERFORMANCE QUALITY ASSESSMENT** |
| **Quality Assessment/Color** | **Definition** |
| *SATISFACTORY (S)/GREEN* | *During the contract period, contractor performance is substantially meeting (or substantially met) contract requirements. For any problems encountered, contractor took effective corrective action.* |
|  *UNSATISFACTORY(U)/RED* | *During the contract period, contractor performance is not meeting (or did not meet) some contract requirements. For problems encountered, corrective action appeared only marginally effective, not effective, or not fully implemented. Customer involvement was required.* |
| *NOT AVAILABLE(N)/WHITE* | *Quality and/or performance information is not available.* |

The team evaluated all ratings provided by all of the sources of past performance information to establish a rating of Acceptable or Unacceptable *(Pass or Fail could also be used)*. For Offerors with no recent or relevant past performance, a rating of Neutral was given. A Neutral rating was considered Acceptable. The definitions of these ratings follows:

|  |
| --- |
| **PAST PERFORMANCE RATINGS** |
| **Rating** | **Definition** |
| ACCEPTABLE  | During the contract period, contractor performance is substantially meeting (or substantially met) contract requirements. For any problems encountered, contractor took effective corrective action. |
| UNACCEPTABLE  | During the contract period, contractor performance is not meeting (or did not meet) some contract requirements. For problems encountered, corrective action appeared only marginally effective, not effective, or not fully implemented. Customer involvement was required. |

1. Price *(Add data based on what is stated in the FOPR for the cost/price evaluation.)*
2. **PROPOSAL EVALUATION RESULTS.**
3. **INITIAL EVALUATION.** (*If not conducting Interchanges, the document will only have one section to document the evaluation results and assigned ratings.)*

The following factors and subfactors were evaluated as detailed below:

1. Technical.

*(In this section, document the technical evaluation for each offeror and subfactor. Summarize the information in order to substantiate the Offeror’s assigned Acceptable or Unacceptable rating.*

1. Offeror X….
2. Past Performance.

*(In this section, document the past performance information evaluated. Summarize the information in order to substantiate the Offeror’s assigned Acceptable or Unacceptable rating. Discuss any unresolved adverse past performance information and results of Interchanges to allow the offeror the opportunity to address (only required if adverse past performance not found in an official final Contractor Performance Assessment Report (CPAR). For example:*

*ABC Company*

*Contract Number: FA8051-14-C-5555*

*Title/Scope: Food Service at Al Udeid, Qatar*

*Dollar Amount: $5M*

*Period of Performance: 1 Oct 13 through 30 Sep 14*

*Ratings: Acceptable to Exceptional*

*Relevancy Rating: Relevant*

*Recency Rating: Recent*

*Based on the above information, the past performance rating for Offeror XX was determined Acceptable.)*

1. Price.

*(In this section, list the Offerors and the Offeror’s prices in a table. Discuss adequate price competition in narrative and/or any other basis against which the Contracting Officer determined the price fair and reasonable such as balanced, reasonableness, etc. The price evaluation must documented IAW the FOPR methodology).*

1. Offeror Initial Evaluation Summary.

*(Example below, modify to fit the FOPR and clearly display the offeror’s initial evaluation.)*

|  |  |  |  |
| --- | --- | --- | --- |
| **OFFEROR** | **Technical** | **Past** **Performance** | **TOEP** |
| **Subfactor 1** | **Subfactor 2** |  |  |
| **Offeror 1** | Acceptable | Acceptable | *PASS* | $ |
| **Offeror 2** | Unacceptable | Acceptable | *Recent/Relevant/Satisfactory Confidence* | $ |
| **Offeror 3** | Unacceptable | Acceptable | *Acceptable* | $ |

1. **INTERIM EVALUATION. (INTERCHANGES)** *(if used)*

The Contracting Officer, with Decision Authority approval, determined it in the Government’s best interest to enter Interchanges with XXX offerors. All offerors were given the opportunity to revise their final price regardless if any interchanges were needed with the offeror.

 (*Discuss specifics of the interchanges for each offeror and factor as applicable: Government question, offeror response, and government’s evaluation of the response. Discuss if follow-up interchanges were required: Government question, offeror response, and government’s evaluation of the response. Discuss any unresolved issues and impact on the subfactor rating. Include a table to show updated ratings as result of Interchanges)*

|  |  |  |  |
| --- | --- | --- | --- |
| **OFFEROR** | **Technical** | **Past** **Performance** | **TOEP** |
| **Subfactor 1** | **Subfactor 2** |  |  |
| **Offeror 1** | Acceptable | Acceptable | *PASS* | $ |
| **Offeror 2** | Acceptable | Acceptable | *Recent/Relevant/Satisfactory Confidence* | $ |
| **Offeror 3** | Acceptabe | Acceptable | *Acceptable* | $ |

1. **FINAL EVALUATION.**

(*Discuss any proposal updates received as a result of closing interchanges, i.e., price updates).*

|  |  |  |  |
| --- | --- | --- | --- |
| **OFFEROR** | **Technical** | **Past** **Performance** | **TOEP** |
| **Subfactor 1** | **Subfactor 2** |  |  |
| **Offeror 1** | Acceptable | Acceptable | *PASS* | $ |
| **Offeror 2** | Acceptable | Acceptable | *Recent/Relevant/Satisfactory Confidence* | $ |
| **Offeror 3** | Acceptabe | Acceptable | *Acceptable* | $ |

***Example language for Sections 3 and 4 for tradeoff:***

1. **EVALUATION FACTORS AND SUBFACTORS.**

*(Evaluation factors and subfactors represent those specific characteristics that are tied to specific solicitation requirements. They are the discriminators against which a tradeoff would be made, if in the best interest of the Government. These factors and subfactors identify the requirements that are key to successful performance. List the factors and subfactors exactly as these appear in the solicitation. Include the order of importance).*

The following factors and subfactors are included under this tradeoff selection:

1. Technical. *(Include subfactors and aspects, if used, and the order of importance).*

|  |  |
| --- | --- |
| **Subfactor** | **Description**  |
| 1. Management
 | *(Break out aspects, if used)* |
|  |  |
|  |  |

|  |  |
| --- | --- |
| **Technical Ratings** | **Definition** |
| Outstanding | Proposal meets requirements and indicates an exceptional approach and understanding of the requirements. Strengths far outweigh any weaknesses. Risk of unsuccessful performance is very low. |
| Good | Proposal meets requirements and indicates a thorough approach and understanding of the requirements. Proposal contains strengths which outweigh any weaknesses. Risk of unsuccessful performance is low. |
| Acceptable | Proposal meets requirements and indicates an adequate approach and understanding of the requirements. Strengths and weaknesses are offsetting or will have little or no impact on contract performance. Risk of unsuccessful performance is no worse than moderate.  |
| Marginal | Proposal does not clearly meet requirements and has not demonstrated an adequate approach and understanding of the requirements. The proposal has one or more weaknesses which are not offset by strengths. Risk of unsuccessful performance is high. |
| Unacceptable | Proposal does not meet requirements and contains on or more deficiencies. Proposal is unawardable. |

1. Past Performance. *(Past performance is not required under FAR 16.5. If used, outline how it was conducted IAW the FOPR. All components are included in this template, but do not have to be used (i.e., relevancy or quality assessment, could be tied to technical acceptablility, etc.) Example language for all components being used:* The Past Performance evaluation resulted in an assessment of the Government’s confidence in the Offeror’s probability of performing the solicitation requirements. The past performance evaluation considered each Offeror’s (and teaming partners’) demonstrated recent and relevant record of performance in supplying products and services that meet the solicitation requirements. In conducting the Past Performance evaluation, the Government reserved the right to use both the information provided in the Offeror’s Past Performance proposal and information obtained from other sources available to the Government such as the Past Performance Information Retrieval System (PPIRS), Federal Awardee Performance and Integrity Information System (FAPIIS), Electronic Subcontract Reporting System (eSRS), other databases, and interviews/questionnaires with Program Managers, Contracting Officers, Fee Determining Officials, the Defense Contract Management Agency (DCMA), and commercial sources. All past performance documentationprovided by the contractor was evaluated to determine relevancy and recency. Each project with past performance information obtained was given one of the following ratings:

|  |
| --- |
| **PAST PERFORMANCE RELEVANCY RATINGS** |
| **Rating** | **Definition** |
| Very Relevant | Present/past performance effort involved essentially the same scope and magnitude of effort and complexities this solicitation requires. |
| Relevant | Present/past performance effort involves similar scope and magnitude of effort and complexities this solicitation requires. |
| Somewhat Relevant | Present/past performance effort involved some of the scope and magnitude of effort and complexities this solicitation involves. |
| Not Relevant | Present/past performance effort involved little or none of the scope and magnitude of effort and complexities this solicitation requires. |

All past performance references provided by the contractor was evaluated to determine recency. Each project with past performance information obtained was given a rating of Recent or Not Recent. The definitions of these ratings are as follows:

|  |
| --- |
| **PAST PERFORMANCE RECENCY RATINGS** |
| **Rating** | **Definition** |
| RECENT  | Recent is defined as performance occurring within the last five years.  |
| NOT RECENT  | Not Recent is defined as performance occurring more than 5 years from the date of the issuance of the RFP.  |

All recent and relevant past performance references were also evaluated to assess quality. Each reference was given one of the ratings as defined below:

The team evaluated all of the references provided by all of the sources to determine a confidence rating *(or acceptable / unacceptable rating could be used)*. For Offerors with no recent or relevant past performance, a rating of Neutral was given. A Neutral rating was considered Satisfactory Confidence. The following ratings were used in the performance confidence evaluation.

|  |  |
| --- | --- |
| **CONFIDENCE RATING** | **DESCRIPTION** |
| Substantial Confidence  | Based on the Offeror’s recent/relevant performance record, the Government has a high expectation that the Offeror will successfully perform the required effort. |
| Satisfactory Confidence  | Based on the Offeror’s recent/relevant performance record, the Government has a reasonable expectation that the Offeror will successfully perform the required effort. |
| Limited Confidence  | Based on the Offeror’s recent/relevant performance record, the Government has a low expectation that the Offeror will successfully perform the required effort. |
| No Confidence | Based on the Offeror’s recent/relevant performance record, the Government has a no expectation that the Offeror will successfully perform the required effort. |
| Unknown Confidence (Neutral)  | No recent/relevant performance record is available or the Offeror’s performance record is so sparse that no meaningful confidence assessment rating can be reasonably assigned. |

1. Price *(Add data based on what is stated in the FOPR for the cost/price evaluation)*
2. **PROPOSAL EVALUATION RESULTS.**
3. **INITIAL EVALUATION.** (*If not conducting Interchanges, will only have one section to document the evaluation results and assigned ratings.)*

The following factors and subfactors were evaluated as detailed below under this LPTA selection:

1. Technical.

*(In this section, document the technical evaluation for each offeror and subfactor. Identify any strengths, defincienes, or weaknesses IAW the FOPR. Summarize the information in order to substantiate the Offeror’s assigned rating.)*

1. Offeror X….
2. Past Performance.

*(In this section, document the past performance information evaluated. Summarize the information in order to substantiate the Offeror’s assigned rating (i.e., Confidence or Acceptable/Unacceptable IAW the FOPR). Discuss any unresolved adverse past performance information and results of Interchanges to allow the offeror the opportunity to address (only required if adverse past performance not found in an official final Contractor Performance Assessment Report (CPAR)).*

*ABC Company*

*Contract Number: FA8051-14-C-5555*

*Title/Scope: Food Service at Al Udeid, Qatar*

*Dollar Amount: $5M*

*Period of Performance: 1 Oct 13 through 30 Sep 14*

*Ratings: Satisfactory Confidence*

*Relevancy Rating: Relevant*

*Recency Rating: Recent*

*Based on the past performance data evaluated, Offeror \_ is assigned a Substantial Confidence rating.)*

1. Cost/Price.

*(Include a table to depict the offeror’s prices in comparision to the IGCE (if used as a point of comparision). Discuss adequate price competition in narrative and/or any other basis against which the Contracting Officer determined the price fair and reasonable such as balanced, reasonableness, etc. Document IAW the FOPR methodology, i.e., realism MPC, etc.)*

1. Offeror Initial Evaluation Summary.

*(Example below, modify to fit the FOPR and clearly display the offeror’s initial evaluation. Can also include number of strengths, weaknesses, and deficiencies.)*

|  |  |  |  |
| --- | --- | --- | --- |
| **OFFEROR** | **Technical** | **Past** **Performance** | **TOEP** |
| **Subfactor 1** | **Subfactor 2** |  |  |
| **Offeror 1** | Acceptable | Acceptable | *PASS* | $ |
| **Offeror 2** | Unacceptable | Acceptable | *Recent/Relevant/Satisfactory Confidence* | $ |
| **Offeror 3** | Unacceptable | Acceptable | *Acceptable* | $ |

1. **INTERIM EVALUATION. (INTERCHANGES)** *(if used)*

The Contracting Officer determined it in the Government’s best interest to enter Interchanges with XXX offerors. All offerors were given the opportunity to revise their final price regardless if any interchanges were needed with the offeror.

 (*Discuss specifics of the interchanges for each offeror and factor as applicable: Government question, offeror response, and government’s evaluation of the response. Discuss if follow-up interchanges were required: Government question, offeror response, and government’s evaluation of the response. Discuss any unresolved issues and impact on the subfactor rating. Include a table to show updated ratings from Interchanges.)*

Offeror Interim Evaluation Summary.

|  |  |  |  |
| --- | --- | --- | --- |
| **OFFEROR** | **Technical** | **Past** **Performance** | **TOEP** |
| **Subfactor 1** | **Subfactor 2** |  |  |
| **Offeror 1** | Acceptable | Acceptable | *PASS* | $ |
| **Offeror 2** | Good | Good | *Recent/Relevant/Satisfactory Confidence* | $ |
| **Offeror 3** | Good | Acceptable | *Acceptable* | $ |

1. **FINAL EVALUATION RESULTS.** The below chart depicts the final ratings of each offeror (*Discuss any proposal updates received as a result of closing interchanges, i.e., price updates. Include a table to show updates from closing Interchanges, i.e., price.)*

|  |  |  |  |
| --- | --- | --- | --- |
| **OFFEROR** | **Technical** | **Past** **Performance** | **TOEP** |
| **Subfactor 1** | **Subfactor 2** |  |  |
| **Offeror 1** | Acceptable | Acceptable | *PASS* | $ |
| **Offeror 2** | Good | Good | *Recent/Relevant/Satisfactory Confidence* | $ |
| **Offeror 3** | Good | Acceptable | *Acceptable* | $ |

**5. COMPARATIVE ANALYSIS.**

*(For tradeoff evaluations, include a comparision summary of the offerors in relation to the Factors used (i.e., Pass/Fail, Technial, Past Performance, Price) in the FOPR.*

1. **AWARD RECOMMENDATION.**

In accordance with the criteria set forth in the FOPR and based on the team’s assessment, recommend awarding to Offeror \_\_\_, which represents the best value to the Government.

*JANE L. DOE, Rank*, DAF FOT Chair

 Date:

 *JANE L. DOE, Rank*, DAF Contracting Officer

 Date:

Attachments:

1. (include as necessary)