Oral Presentation Information
for Evaluation Team Members

Version 1
6/25/2020

Oral presentations allow the Government to hear directly from the vendor and their technical experts about their solutions, technical approach, prior experience, or even technical capabilities and create a dialogue. The information provided in this worksheet is helpful information for evaluator's preparing to participate in the presentation evaluation. See FAR 15.102 for more information on oral presentations.

Dialogue:

Evaluators may ask questions to the vendors' technical experts and key personnel while also engaging in interactive dialogue to truly understand the proposed solution. Dialogue exchanges are to only be conducted within the confines of the oral presentation. GAO views exchanges between evaluation team and the presenting company as "Component of the oral presentation itself".

GAO ruling has confirmed that asking questions during oral presentations does not constitute opening discussions as long as we **DO NOT ask for or accept offeror's revision for any part of previously submitted paper proposal or any subsequent proposal revisions. If vendor offers revisions, decline acceptance.** This action would open discussions and open the evaluation to protest risk. If, during an oral presentation, the evaluation team decides to conduct discussions (see FAR 15.306(d)), they must comply with FAR 15.306 and FAR 15.307.

The responsibility for providing a thorough, persuasive response to agency questions as part of the oral presentation falls on the offeror.

Question Format:

Standard Questions (asked to all vendors)
- May provide initial questions in the solicitation/RFQ
- Or, provide an hour or so before the oral presentation
- Or, include on-the-spot questions asked during the presentation
- Evaluators may ask scenario-based question to gauge knowledge and situational response

Individualized Questions (Not asked to all vendors)
- Questions may be asked based on information shared by the offeror in their oral presentation
- Individualized questions are not provided to all offerors
- This is not an opportunity to challenge offeror's approach but to ensure that evaluators fully understand offeror's approach/capability/prior experience (what is being evaluated)
- Don't ask leading questions. This may be confused as discussions. "Tell me more about…." would be a generalized way to get near the topic without leading.

Documentation:

FAR 15.102(e) does not prescribe required documentation for record of oral presentation. Recording or transcript of presentation is not required. Suggested formats for record:
- PDF of presentation calendar invite
- Copy of presentation slides (if requested in solicitation/RFQ)

Evaluation:

Conduct an On-the-Spot Consensus immediately following at conclusion of presentation. If virtual presentation, switch to other bridge or other conference platform to ensure privacy.
- The evaluation team evaluates immediately and makes decision in real time before starting the next presentation
- The evaluation team members do not separately document their individual positions (although they may have made observation notes)
- Document the rationale for the decision using bullet format
- The team consensus worksheet may be used to document the rating and team's observations

Tips for Success:

Recommendations based on feedback from previous requirement's oral presentations sessions:
- Follow your solicitation/RFQ's established ground rules for the oral presentation

- Individual notes are helpful to annotate observations but do not become part of the file

- Focus on content of information and not necessarily on performance of presenters:
  o Technical experts most likely will not be polished presenters and may be nervous. Don't dismiss what they say! They may have great understanding of the requirement.
  o Polished presenters may captivate their audience with their presentation skills and not provide depth to establish their full understanding of the requirement. Pay close attention.

- Observing the presenter's team dynamics is acceptable. If they obviously don't work together for a presentation how would the performance be on your requirement?

- Session facilitator (most likely the CO) should interject if the presentation dialog moves off topic of what is being presented and evaluated.

- Conduct a dry run of government team. Go over the introduction and flow of events and talk out standard questions (if applicable) to present to the offerors an organized team. Perfect time to discuss the information in this document and answer questions the team may have.

- Clear your schedule and participate in all scheduled oral presentation sessions and evaluations.

- Evaluation team may hold caucus prior to the conclusion of offeror's presentation. This is time to do a quick team huddle to see if there were any additional questions to ask before concluding:
  o In virtual presentations, the evaluation team may leave the presentation and re-join on separate conference platform (bridge line/teams/zoom) before returning with final questions. Ensure you have successfully muted or completely left the offeror's conference.
  o In person, have another conference room reserved away from presentation area.

- Hard stops on time may not be necessary (if schedule allows) for a small amount of additional time for conclusion of dialogue. Use good judgement.

- Once the presentation ends, the dialogue stops.

Resources:
FAR 15.102
PIL Primer Video
Periodic Table of Acquisition Innovation, Solicitation column, click on Oral Presentations box
GAO cases: B-415891, Vertical Jobs, Apr. 19, 2018 & B-412163, Sapient, Jan. 4, 2016

Title: _____

Solicitation/RFQ No: _____

Non-Price Factor (#) – ___(factor title)___

(paste in this area the factor's information from the RFQ. What did you ask for the vendors to submit or present for this factor? This area will help with facilitation of team and keep them on track with the factor they are evaluating.)

Available Confidence Ratings:

High Confidence	The Government has *high confidence* that the Offeror understands the requirement, proposes a sound approach, and will be successful in performing the contract with *little or no* Government intervention.
Some Confidence	The Government has *some confidence* that the Offeror understands the requirement, proposes a sound approach, and will be successful in performing the contract with *some* Government intervention.
Low Confidence	The Government has *low confidence* that the Offeror understands the requirement, proposes a sound approach, or will be successful in performing the contract *even with* Government intervention.

Offeror: _____

Assigned Confidence Rating: _____

- Enter here the Evaluation team's observations to support the assigned rating highlighting important benefits and/or concerns of each offeror.
- Remember in consensus only the majority of the evaluation team must agree on the assigned rating.
  - If an evaluation team member does not agree give the opportunity to discuss their observations and reasoning for disagreeing. Maybe they observed something that would raise or lower the rating that was not observed by the other team members.
- Bullets allow the evaluators to highlight important benefits and/or concerns of each offeror.
- All you need to do is support ratings with clear, concise, reasonable, and rational bullet statements.
- Strong bullets to support ratings:
  - Address all the criteria for the non-price factor
  - Not grouped as good vs. bad
  - Should be standalone independent judgments
  - Reader can easily distinguish the team's relevant thoughts
- If individual sheets were used, these are no longer needed after team has reached agreement and are to be deleted when rating is assigned.
- Remember when using confidence ratings, of relative strengths, deficiencies, significant weaknesses, and risks are only required for FAR Part 15.3 Source Selections.

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Offeror: _____

Individual Notes:

- Notes area for individual use only and may be helpful for team's consensus
- Delete document once team evaluation is completed