1.4 Source Selection Team Roles and Responsibilities

1.4.1 Source Selection Authority (SSA).

1.4.1.1 SSA Appointment.

SSA Designations	$10M to less than $100M	$100M and above
Program Acquisition Category (ACAT) I, IA	Cognizant SAE (Note 1)	Cognizant SAE (Note 2)
All other ACAT programs in a PEO portfolio	Program Executive Officer (PEO) (Note 1)	PEO (Note 2)
Services subject to DAFI 63-138	Services Acquisition Decision Authority (SADA) (Note 3)	SADA (Note3)
All other acquisitions for which formal source selection procedures are used	PCO	One level above the PCO

Note 1: Delegable to no lower than the Procuring Contracting Officer (PCO)/equivalent or higher position within the PEO/ requiring organization chain.

Note 2: Delegable to no lower than one level above the PCO or equivalent or higher position within the PEO/ requiring organization chain.

Note 3: See DAFI 63-138 Tables 2.1 and 2.2 for delegations

A tailorable Delegation of Source Selection Authority (SSA) template is available for use, as desired.

1.4.1.2 SSA Responsibilities. In addition to the responsibilities listed in FAR 15.303(b), DFARS 215.303(b)(2),and the DOD Source Selection Procedures, the SSA shall:

1.4.1.2.3 Be accessible to the PCO, SSEB Chairperson and SSAC Chairperson (if applicable) to ensure that necessary leadership and guidance is provided to the SST. Promote active communication within the SST and encourage the team to raise concerns/issues.

1.4.1.2.6 See the following tailorable templates:

1.4.1.2.6.1 *Source Selection Non-Disclosure Agreement (NDA)* . An NDA may be executed on an annual basis in accordance with DAFFARS 5303.104-4(a).

1.4.1.2.6.2 Conflict of Interest Statement.

1.4.2 PCO.

1.4.2.2 PCO Responsibilities. In addition to the responsibilities listed in FAR 15.303(c) and the DoD Source Selection Procedures, the PCO shall:

1.4.2.2.2 Consider sample RFP Section L language for Use of Non-Government Advisors, when applicable.

1.4.2.2.3 Manage all source selection documents, control and record all exchanges with offerors, and protect all documents (see Section 4). Consider identifying a Source Selection Records Custodian (SSRC) familiar with the contracting process to manage all source selection documents (PCO or someone under PCO oversight). Ensure source selection material is not removed, circulated, or disseminated outside of the source selection work area without PCO review and approval. Ensure all means of electronic communications receive additional scrutiny to preclude inadvertent release of documents that contain sensitive or embedded source selection files. It is a good practice that prior to transmission of Source Selection Information to offerors via any means, the information is reviewed by a second person to preclude inadvertent inclusion of inappropriate data. Additionally, Source Selection Information transmitted to offerors electronically (e.g., via email or disc) or posted to a website must be distributed in a "locked" format, such as scanned .pdf file, .jpeg file, or other protected format, unless offerors are required to fill-in or complete portions of a document, such as Section K Representations and Certifications, or a pricing matrix. Using e-mail to transmit source selection information should be done judiciously and it must be encrypted and digitally signed. Include in the subject line the phrase "Source Selection Information – See FAR2.101 and3.104". Use the Source Selection Information Cover Sheet to identify source selection information. A sample Verification of Correspondence Going to Offeror checklist may be utilized, as desired.

1.4.2.2.4 Maintain in the official contract file (whether in hard copy or electronic media) all evaluation material and any related supporting information, including minority and dissenting opinions, that has been presented in any form to the SSA as an official record that must not be altered. Updates, revisions, or changes to that evaluation information must be captured in subsequent documentation such that the original record remains distinct.

1.4.2.2.4.1 Working papers, calculations, and personal notes must be clearly identified as such and are not normally part of the official source selection record unless they include information relevant to the source selection decision and the information has not been captured in the official record. Solicit the advice of legal counsel and representatives from the Acquisition Center of Excellence (ACE) (if used) regarding the management and/or retention determination of any paper or digital document generated during the source selection. Legal counsel, the SSEB Chair, SSRC (if other than the PCO) and the PCO must review any notes, working papers, and other documents for a retention determination at regular intervals during the source selection process and upon completion.

1.4.2.2.4.2 Preserve documents and data that are not stored within the electronic official contract filing system (e.g., classified documents, product samples, electronic media) as part of the official record and identify their physical location. A sample Source Selection File Checklist may be tailored for use, as desired.

1.4.2.2.4.3 Ensure that any requests for source selection delegations are properly accomplished and documented in the source selection file.

1.4.2.2.7 Send a notice to all appropriate organizations (e.g., user or requirements personnel, public affairs offices, etc., that could be contacted by offerors or media outlets concerning the requirement or acquisition) concurrent with issuance of the solicitation announcing that a source selection is in

progress. For acquisitions estimated at $100M or more, send the notice to the cognizant HCA Workflow for HAF-level notification. The notice shall:

1) identify the system, subsystem, service, or project involved;

2) identify the anticipated period of the source selection activities;

3) include a statement to the effect that contacts or briefings concerning the program by industry are no longer allowed outside of the formal source selection process; and

4) state that the PCO (include name and phone number) controls all contact or exchanges with industry/offerors and is the only person authorized to release source selection information before and after contract award.

A tailorable template for Notice Announcing that a Source Selection is in Progress is available for use, if desired.

1.4.2.2.12 Post *source selection lessons learned* no later than 90 days after contract award or termination/cancellation of the source selection.

1.43 SSAC.

1.4.3.2 SSAC Composition.

1.4.3.2.1 It is preferable that the SSAC Chairperson not be in the chain of command of the SSA.

1.4.3.2.2 For all new Milestone B (Pre-MDAP on Major Defense Acquisition Program lists) ACAT I and II competitive acquisitions, the specific composition of the SSAC should consist of senior leaders (flag rank or 0-6/GS-15/NH-04 to the maximum extent practicable) from Program Management, Engineering, Finance, Legal, Contracting, Small Business, the ACE, and any other participants as determined appropriate by the SSA, who have recent experience in the successful conduct of source selections. For all other acquisitions when an SSAC is used, the specific composition of the SSAC is at the discretion of the SSA, based upon the expertise required to accomplish a successful source selection. The SSAC may be augmented with senior leaders from the SAF/AQ or SAF/SQ staff, when appropriate, to provide additional experience and expertise. The SSAC may also be supplemented by other subject matter experts at comparable functional positions.

1.44 SSEB.

1.4.4.4 SSEB Responsibilities.

1.4.4.4.1.7 It is considered a best practice for the Program Manager (PM), when one is assigned, to serve as the SSEB Chairperson. It is also a best practice that the SSEB chair not serve in multiple roles.

1.4.4.4.3 For source selections without an SSAC, the SSEB Chairperson must document in the source selection plan, whether or not the SSA wants the SSEB to perform the comparative analysis of proposals and provide that analysis and an award recommendation in the SSEB Final Report.

1.4.6 Other Advisor’s.

1.4.6.1 Government Advisor’s. Foreign Military Sales (FMS) customers and international cooperative project partners may only participate in the source selection process as advisor’s. The PCO must not

disclose to the FMS customer any form of cost or price data that is proprietary unless the offeror authorizes its release.

1.4.6.2.2 Limitations on use of nongovernment advisor’s. Nongovernment advisor’s shall not attend the past performance portion of evaluation briefings