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| Informational Guidance |

**IG5315.102  
Oral Presentations**

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This guide integrates ideas and lessons learned from a cross-section of the contracting community to provide practical guidance for using oral presentations when contracting by negotiation.

**TABLE OF CONTENTS**

I. [INTRODUCTION](#intro) 2

II. [ADVANTAGES/DISADVANTAGES IN USING ORAL PRESENTATIONS](#Consid) 2

III. [CONSIDERATIONS FOR USING ORAL PRESENTATIONS](#situ) 3

IV. [PROCESS](#process) 5

V. [REFERENCES](#ref) 9

**I. INTRODUCTION**

**A.** **Purpose.** Oral presentations have the potential to reduce proposal preparation costs, reduce Government evaluation time, and facilitate a better understanding of an offeror's proposal and their ability to perform the contract. Experience indicates the proper use of oral presentations can make the source selection process more effective; however, teams must use judgment to determine whether oral presentations are right for a particular acquisition.

**B.** **Definition.**  For the purposes of this guide, an oral presentation is a real-time audio and visual presentation of proposal information in response to a solicitation, whether conducted on-site or by teleconference or video teleconference. The regulatory guidance covering the use of oral presentations can be found at [FAR 15.102](http://farsite.hill.af.mil/reghtml/regs/far2afmcfars/fardfars/far/15.htm) “Oral Presentations.”

**II. ADVANTAGES/DISADVANTAGES IN USING ORAL PRESENTATIONS**

**A.** **Advantages.** Oral presentations can potentially reduce the time and costs associated with the source selection process. For example, certain types of written proposal information, particularly in the technical and management areas, are costly to prepare and time-consuming to evaluate. It is often easier for an offeror to communicate and explain these capabilities orally and/or visually instead of in writing. The use of oral presentations also allows for greater face-to-face interaction between the Government and offerors not only during initial proposal evaluations but throughout the selection process, including discussions and the submission of proposal revisions. This is especially important in those acquisitions where the offeror’s key personnel are critical to the success of an acquisition. Oral presentations may also provide a more level-playing field for offerors with the expertise to satisfy the Government’s requirement but little experience in preparing Government proposals. Other advantages of using oral presentations include:

1. Enabling offerors to explain their proposal in simple terms or plain English. In the case of scientific or technical proposal information, subject matter expert evaluators may be able to gain a better understanding of the proposed concepts through oral presentations by their peers.

2. Making users/customers feel more involved in the contract selection and award process.

3. Providing a follow-up question-and-answer session which: (a) allows evaluators face-to-face observation and interaction with key project members, (b) improves depth of understanding behind the written proposal or presentation charts, (c) permits better understanding of the overall approach to meeting the requirement.

**B.** **Disadvantages.** Using oral presentations may have some potential disadvantages. In some instances, the offeror’s proposal preparation costs may actually increase. For example, the offeror may decide to spend money to train perfectly competent engineers to be more effective public speakers or presenters. While this may be good for the employees’ personal development, it may unnecessarily increase overall proposal costs. Potential disadvantages to consider are:

1. The freedom of dialogue during follow-up question-and-answer periods may be stifled by evaluators’ fears of inadvertently conducting discussions. Mandatory procedures for conducting discussions can be found at [MP5315.306](https://cs.eis.af.mil/airforcecontracting/knowledge_center/Pages/5315-main.aspx#MP).

2. It may be difficult to document and control the exchanges.

3. Industry may be unwilling to participate. Small businesses may believe the cost of oral presentations is prohibitive or that they are at a disadvantage when competing against large businesses.

4. The quality of the presentation may unduly influence the evaluation.

5. It may be logistically difficult to conduct oral presentations if a large number of proposals are received.

6. It may be more time-consuming if used in conjunction with written proposals.

**III. CONSIDERATIONS FOR USING ORAL PRESENTATIONS**

**A. Consider whether to use oral presentations early in the acquisition planning process.**  Discuss the use of oral presentations with industry early in the acquisition process, preferably in conjunction with market research. Industry feedback may be obtained through forums such as industry conferences, one-on-one meetings, postings on business opportunities web sites and FedBizOpps notices. Industry comments on draft Request for Proposal (RFP) oral presentation instructions may result in a better understanding of the Government’s intentions and help avoid some of the potential disadvantages discussed in paragraph II.B.

**B. Use of oral presentation techniques need not be applied to entire proposal.** Teams may decide to apply the technique to one or some of the evaluation factors or sub-factors. Using oral presentations is not an “all-or-none” decision.

**C. The following considerations are provided to help decide whether oral presentations will be beneficial for a particular contracting situation:**

1. Oral presentations are best suited for acquisitions for services, task-order contracts, and some basic and applied research and development efforts. Offeror qualifications and experience are normally more important on these types of acquisitions, and oral presentations lend themselves well to delivering this kind of information about the offeror. On more complex acquisitions, oral presentations have been successfully used to gain information regarding team and management processes, corporate commitment, understanding of requirements, and subcontractor relationships. Acquisitions for noncomplex items also lend themselves to oral presentations, since the offerors can more easily state how they will fulfill the requirement. Additionally, past performance is often a good candidate for oral presentation.

2.Requirements should be well defined. If the offeror is required to provide oral technical proposal information or answer a sample technical task, enough information should be given in the RFP to define the requirement. Performance and/or functional specifications (as opposed to detailed or design specifications) are desirable when using oral presentations, since this gives the offeror flexibility in the approach used to fulfill the requirement.

3. Oral presentations seem to work well when the technical and/or management information requested is neither voluminous nor highly complex. Examples are:

(a) presentation of the entire Mission Capability (technical) factor on smaller, less complex acquisitions;

(b) presentation of entire technical proposal when using the Low-Price Technically Acceptable (LPTA) technique or the technical proposal and/or past performance information when using the Performance Price Trade-Off (PPT) technique; or

(c) addressing adverse past performance information.

4. For larger or more complex acquisitions, oral presentations may be appropriate for addressing certain sub-factors under Mission Capability such as risk mitigation plans, or cost/price risk. Depending upon the requirement, oral presentations may be used on complex acquisitions using the formal source selection process.

5. With respect to evaluation factors/sub-factors, oral presentations are best applied to evaluations of management capability, corporate strengths and capabilities, personnel qualifications, adequacy of facilities and/or processes.

6.Make sure to consider whether the Government has the ability to adequately evaluate oral presentations.

7. Address use of oral presentations in Acquisition and Source Selection Plans.

8. Ensure participating non-government personnel execute a non-disclosure agreement.

**IV. PROCESS**

**A. Evaluation Factors.** Evaluation factors most commonly addressed via oral presentations are Mission Capability (technical) and Past Performance. For Mission Capability (technical), the relevant sub-factors must be selected with great care. The sub-factors should help the source selection team determine how well qualified the offeror is to perform all aspects of the work, how well the offeror understands the requirements, and precisely how the offeror will approach the accomplishment of the required tasks.

**B.** **Proposal Preparation Instructions.** The instructions on how oral presentations will be used to evaluate and select the contractor should be addressed in Section L (or FAR Part 12 equivalent), “Instructions, conditions, and notices to offerors or respondents” of the solicitation. In developing Section L (or FAR Part 12 equivalent), the following should be considered:

1. Specify what proposal information is to be submitted in writing. Describe the topics that the offeror must address orally and the factors/sub-factors that must be presented.

2. State the total amount of time available to make the presentation and the qualifications of personnel who must make it. Include any limits on the number of offeror representatives that may attend. The offeror's project manager and key personnel who will be responsible for contract performance should present the briefing rather than marketing staff or professional proposal writers/presenters.

3. State whether oral presentation material must be submitted along with the written proposal. This may be advisable since practice has shown that providing advance copies of presentation slides is helpful to evaluators. If requiring submission of oral presentation material, specify the format (see paragraph IV.B.(13)). To preclude any question about what will be considered in the Government’s evaluation of the oral presentation, specify that only the oral presentation itself will be considered unless the sub-factor(s) is also being evaluated with a written submission. Oral presentation slides will not suffice in lieu of either the oral presentation or a required written submission in response to the solicitation.

4. State that in the event of a conflict between the written proposal, oral presentation, and the oral presentation briefing slides, the order of precedence is the proposal, the oral presentation, and then the briefing slides.

5. Describe the limitations on Government-offeror interaction during and after the presentation. State whether there will be a question-and-answer session following the offeror’s presentation, and if so, the specific length of time for that session.

6. State whether or not the Government intends to allow discussions as defined in [FAR 15.306](http://farsite.hill.af.mil/reghtml/regs/far2afmcfars/fardfars/far/15.htm).

7. State whether the offeror will be required to solve a sample task(s).

8. State whether models or samples will be permitted.

9. State whether the presentation will encompass price or cost and fee (keep in mind that the cost/fee or price offer must be in writing). Price or cost information should normally be limited to testing the offeror’s understanding and ability (such as how it developed the cost estimate or why it selected one technique over another).

10. State if non-government personnel will be participating as part of the source selection and the manner in which they will be used. Add appropriate Organizational Conflict of Interest (OCI) clauses.

11. Clearly identify where the presentations will be held or whether teleconferences or video teleconferences will be used.

12. Describe the characteristics and arrangement of the presentation site. Describe the types of equipment available and what equipment, if any, should be provided by the offeror. Make the facility available, if possible, for inspection by offerors prior to the presentation date, or provide a picture or drawing of the facility.

13. State the rules governing the use of presentation media.

14. Describe the format and content of presentation documentation and their delivery. To minimize preparation costs and preclude elaborate multimedia presentations, some contracting activities specify that briefing slides should be in black and white, using certain font type and size.

15. State whether the presentation will be audio and/or videotaped. Generally, the Government will record the presentation for the official contract file and provide a copy to the offeror. Protect all notes or other documentation and audio or videotapes in accordance with [FAR 3.104-4](http://farsite.hill.af.mil/reghtml/regs/far2afmcfars/fardfars/far/03.htm) and if support contractors are to be used for recording the presentation.

16. State how the Government will determine the order of presentations, e.g., lottery, alphabetically. When oral presentations are part of the initial proposal, presentations should be scheduled to closely follow the proposal submission.

17. State that the Government will not consider information stated on the oral presentation briefing slides that was not orally presented to the Government within the presentation time-period limitation.

18. State that the offeror is not to provide audio/visual tapes of their proposal in lieu of an oral presentation (the focus should be on real-time interaction, not on the medium used).

**C. Planning and** **Preparing for the Presentations.** Planning and preparing for the presentations include setting up a location, securing commitments of evaluators, deciding how to record the presentations, and providing copies of the presentation to evaluators in advance. There are several things to consider, and the list below is provided to help plan for the day(s) of the presentations:

1. Schedule presentations promptly after receipt of proposals, determine the sequence of the presentations, and inform the offerors. For effective understanding of the oral presentations, allow adequate time for the evaluation team to familiarize themselves with the presentation material.

2. Schedule all evaluators to attend each presentation. In the rare instance an evaluator cannot attend, video tape the presentation. For past performance presentations, limit the audience to government representatives.

3. Ensure microphones are adjusted for adequate volume. Use cordless microphones if available.

4. If using videotape recording (highly recommended for record purposes), consider using a Government audiovisual specialist and be sure the camera can view the podium and screen at the same time.

5. Encourage use of a government timekeeper; and determine mechanism to track time, i.e. clock, timer, etc.

6. Allow adequate evaluation/Government caucus time between presentations.

7. To ensure proper facilities are secured and proper information safeguarding is planned for, ensure offerors know to communicate their intent to present any classified information.

**D**. **Conducting the Presentations.** Prior to the presentation, the contracting officer should review the ground rules, agenda, and time restrictions of the presentation session with the offeror. The contracting officer should also remind the Government participants of their responsibilities during and after the presentation. Remind them that an oral presentation is source selection sensitive, and they may not discuss, except among themselves, anything that occurred or was said at a presentation and then only in pre-ordained/secure areas versus open areas such as hallways, restrooms, etc. Additional matters for discussion include any restrictions on Government-offeror exchanges (e.g., that communications should be facilitated by the contracting officer), information disclosure rules, documentation requirements, notice of time remaining on presentations, and housekeeping items.

**E. Exchanges during the Oral Presentation.**

1. Surveys indicate both parties believe meaningful dialogue during, or subsequent to, the oral presentation is of significant value. However, one of the more problematic areas of the oral presentation approach when used in place of a written proposal is the nature and extent of exchanges between the offeror and the Government evaluation team. This is largely due to the strict rules established in regulation regarding exchanges with offerors after proposal receipt. The rules and definitions on exchanges with offerors are applicable when the source selection team engages in dialogue with the offeror(s) any time during the oral presentation.

2. [FAR 15.306](http://farsite.hill.af.mil/reghtml/regs/far2afmcfars/fardfars/far/15.htm) prescribes strict controls over when and what types of exchanges can occur with an offeror regarding its proposal. When an award is planned without discussions, oral presentations become problematic because of the fear of inadvertently going beyond "clarifications" in an effort to understand the proposal. When exchanges go beyond clarifications, the Government loses its ability to award without discussions. If "communications" are pursued leading to a competitive range determination, then there are fewer restrictions on exchanges. Some solicitations contain instructions and restrictions concerning exchanges during the oral presentation. These instructions can be tailored to fit the Government’s plan to either award without discussion or to permit discussions. The example disclaimer below may be used for solicitations where the Government plans to award without discussions:

"Clarification of Oral Presentation Points.” After completion of the oral presentation, the Government may request clarification of any points addressed that meet the definition of ‘clarification’ in accordance with [FAR 15.306(a)](http://farsite.hill.af.mil/reghtml/regs/far2afmcfars/fardfars/far/15.htm). Any such interchange between the offeror and the Government will be for clarification only and will not constitute discussions within the meaning of [FAR 15.306(b) and (d)](http://farsite.hill.af.mil/reghtml/regs/far2afmcfars/fardfars/far/15.htm). The time required for clarifications will not be counted against the offeror's time limit."

3. If the Government plans to conduct discussions, consider declaring a competitive range and entering into discussions with offerors during oral presentations. Any such oral discussions must be documented in writing for the official record. Successive competitive range determinations can be made after the oral presentations, if required.

4. If any technical information disclosed during oral presentations is essential to contract performance but is not in the written technical proposal, that information is to be put in writing and incorporated into the resultant contract.

5. If exchanges (clarifications, communications, or discussions) will not be conducted during the oral presentations, see [FAR 15.306](http://farsite.hill.af.mil/reghtml/regs/far2afmcfars/fardfars/far/15.htm) and [MP5315.306](https://cs.eis.af.mil/airforcecontracting/knowledge_center/Pages/5315-main.aspx#MP) for further guidance.

**F.** **Evaluating the Presentations.** There is no policy regarding the most appropriate time to evaluate presentations. Some agencies perform their evaluation immediately upon conclusion of each presentation while others conduct their evaluations after all of the presentations have been made. When using the latter approach, the evaluators should caucus following each presentation to exchange reactions, summarize potential strengths and weaknesses, deficiencies and weaknesses, and verify perceptions and understandings.

**V. REFERENCES WITH INFORMATION ON USING ORAL PRESENTATIONS**

AT&L Knowledge Sharing System - search using the phrase “oral presentations”- <http://akss.dau.mil/jsp/default.jsp>

Army Source Selection Guide, Appendix C - Oral Presentations –

Army Source Selection Manual, 16 May, 2008 – <https://www.alt.army.mil/portal/page/portal/oasaalt/documents/ASSM_final_051608.pdf>

Department of Energy Guidelines for Oral Presentations - <http://management.energy.gov/documents/AcqGuide15pt1.pdf>