

### **Equipment Evaluation Trials Process**

- **Discussion Paper submitted by Dina Kowalyshyn, VC of the ISAF Equipment Committee**

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### **Objectives**

The objectives of the equipment selection process are to:

- Ensure the impartial, equitable, and comprehensive evaluation of equipment proposals;
- Maximize the efficiency and minimize the complexity of the evaluation and equipment selection process so as to minimize the cost of the process to ISAF and industry;
- Select the Offeror/Builder/Class whose proposal is the best value to ISAF considering cost/price, technical factors, and past performance, for the performance of the equipment in the Olympics and the events in the quad.
- Document the basis for the selection decision;

This paper aims to define the step by step events that lead to a selection.

The tasks to complete in the process are as follows,

1. Develop the Equipment Selection Plan (ESP). This plan details the activities every evaluation must take to reach the point where recommendation for equipment to Council can be made. At a minimum, the ESP should contain the following items:
  - a. A statement of the general and specific objectives of the plan.
  - b. List of members that are the evaluation team and a description of the selection organization structure, with specific discussion on the duties and responsibilities of the persons responsible. This should involve establishing a evaluation team that includes an Evaluation Manager selected from the Equipment Committees and Sub-Committees, Technical Staff Liaison, a Vice President, and other members as desired.
  - c. Proposed presolicitation activities; e.g., market research, solicitation review and approval.
  - d. A brief summary of the strategy, ie what is the outcome. Are we looking only to find out what is commercially available or are we trying to select equipment for a specific event.
  - e. The criteria (factors) to be used in the evaluation, listed in relative order of importance, along with any additional language necessary to fully describe the relative importance of the factors. If certain factors are equal, or substantially equal in importance, they should be so noted.

- f. Methods for rating/scoring the proposals should be included.
  - g. A description of the evaluation process, methodology, and techniques to be used, including a description of how cost will be evaluated.
  - h. Identification of significant selection milestones.
  - i. When applicable, guidelines for making tradeoff decisions among and within the various factors (particularly among the performance characteristics of the equipment).
2. Define the evaluation criteria matrix
- a. Central criteria that are common to all equipment, and event specific criteria
  - b. Limit evaluation criteria and significant sub-factors to those areas that will reveal substantive differences or risk levels among competing proposals.
  - c. Evaluation criteria must be disclosed in the solicitation announcement.
  - d. Each proposal is compared and measured as objectively as possible against the solicitation and its stated evaluation factors for award. Proposals should not be compared and measured against each other.
  - e. Defining the relationship of cost – This decision must be made as part of the early planning and fully disclosed in the solicitation agreements. The example is  
“All evaluation factors other than cost or price, when combined, are
    - significantly more important than cost or price;
    - approximately equal to cost or price; or
    - significantly less than cost or price.”
3. Establish a Rating System
- a. A rating system helps evaluators assess a proposal’s merit with respect to the evaluation criteria and significant sub-factors in the solicitation. Some commonly used rating systems are adjectival, color coding, and numerical.
    - i. What is key in using a rating system in evaluations is not the method or combination of methods used, but rather the consistency with which the selected method is applied to all competing proposals and the adequacy of the narrative used to support the rating.
4. Solicit proposals from classes and manufacturers
- a. Provide the criteria for selection, disclosure of rating system, and the relative importance of costs.
  - b. Provide trials dates and requirements.

- c. Explicitly tell the potential participants what the trials and evaluation will entail so that the material's needed will be provided.
    - i. Include pre-trials paper submittal for preliminary review. If anyone can be eliminated then they should not be asked to the trials. This must be stated so that the Offeror's provide enough information to evaluate.
  - d. Announce evaluation needs from MNA's to allow them to nominate sailors to the trials.
- 5. Train the evaluation teams to the techniques to be used.
  - a. Review criteria. Practice assignments.
  - b. Develop trials plans.
- 6. Preliminary review of proposals
  - a. Determine if any can meet the stated criteria, or at least if there is a reasonable expectation that they will
  - b. Invite candidates who have some chance of meeting the criteria to a trials event.
- 7. Trials – Actual evaluation of boats to determine information needed to compare against the criteria.
  - a. More than one time period could be needed.
  - b. If physical inspection required for class compliance, this must be done at the trials. Weight, sail areas, spars...We may want to do a "fundamental" type measurement of the parts presented to baseline the equipment. Without this we do not know what has been trialed.
- 8. Evaluation period, data analysis –
  - a. Recap, review, and discuss evaluation efforts to reach a consensus amongst the team.
  - b. Publish results to a limited audience, ie ExComm or some other body of persons. It is very important to have the evaluation team really have to justify the opinions and so publication of results is important. Distribution is very limited and is very sensitive.
- 9. Submissions For Equipment – the final outcome.