Naval Shipbuilding and Advanced Manufacturing
CENTER OF EXCELLENCE

Technical Evaluation Form (TEF)

Date: _____

Project # and Name: _____

PPD/Tech Plan Revision No. and Date: _____

General

The Technical Evaluation Form (TEF) is a tool that NSAM personnel and Independent Reviewers (NSAM assigned) will use to assess how the approach described in the OEM's submitted Project Plan meets the Navy ManTech objectives. This review will identify gaps and provide recommendations on how the project team should address any items assessed as either 'Marginal' or 'Unsatisfactory.'

The goals of this tool are to ensure the impartial, equitable, and comprehensive evaluation of the project plan and determine if the key elements of each NSAM project provide a clear path to transition, implementation and use, resulting in cost reductions for the designated platform.

Purpose

The purpose of this form is to:

- Determine the technical feasibility; identifying Project Plan deficiencies for resolution prior to submittal to the Government Sponsor.
- Document completion and submittal of Non-Disclosure Agreement (NDA) for Independent Reviewers as required (For external participants supplementing any previously subcontracted consultants)
- Evaluate Project Plan elements as "Satisfactory", "Marginal", or "Unsatisfactory" and provide a brief justification for the evaluation
- Document Project Plan elements evaluated as Marginal or Unsatisfactory, which will be submitted to Proposers for resolution prior to submitting the Proposal to the Office of Naval Research

Note: NDAs must be completed and / or verified prior to Technical Proposal review for reviewers not already completed

Reviewer Name/Organization_____

- The NSAM Program Assistant shall verify completion and submittal of Non-Disclosure Agreement (NDA) for contracted Independent Reviewer (as applicable)

Signature/Date_____

Technical Approach – Evaluation of each major section of the technical plan, ensuring the proposed approach is consistent with NSAM efforts and is a reasonable way of investigating the potential Project Candidate.

Section	Description	Sat / Marg / Unsat	Comments (if required)
Manufacturing Issue	The manufacturing technology need and why a Navy ManTech program approach is required. The present manufacturing/repair process, the requirements that are not being met, and the improvements needed are clearly identified. (Specific examples of money, time, and material expenditures that need to be reduced in order to arrive at a more productive utilization of the affected resources).		
Objective	A concise statement that describes the purpose that will be achieved by conducting the project. This statement should briefly describe the proposed project in terms of establishing improved manufacturing processes, methods, or equipment for the production of defense material..		
Work Breakdown Structure (WBS)	Provides a comprehensive classification of project scope. Each WBS should at a minimum consist of three levels: (1) phase, (2) task, and (3) subtask.		
Statement of Work	Provides a concise but complete statement of work for the project that is going to be performed and how this will satisfy the need addressed earlier.		
Responsibility Matrix	Clearly identifies the participant roles with respect to the WBS.		
Goals	A succinct list of goals and their significance to the project in bullet format.		
Metrics Table	Project specific process and/or product goals, along with the exit criteria to be met to satisfy the project's objectives are identified and rational.		
Material / Equipment / Government-Furnished Items Summary	Material, equipment, software, and hardware required for the project have been identified by item, purpose, and task/subtask. Also list any Government-Furnished Information, Government-Furnished Equipment, and/or Government-Furnished Property that will be needed to execute the project.		

Meetings/Travel	Proposed meetings and travel to support the proposed project are reasonable.		
Implementation Plan	Provide a high-level narrative that describes how the project results will be implemented in a production or maintenance facility and implemented on a platform(s) of interest if the project is successful. Key points to include are listed below.. • State the commitments obtained from users to implement the results; include the names of key people and their organizations, if available. • Provide an EROM cost to implement the project results. • Specifically identify the targeted end-item weapon system application and any other expected implementation; specify the expected hull or lot number where the technology will enter platform production and the calendar year. • Indicate the milestone or activity that will denote that the transition point has been reached, the project technology has been accepted, or the project goals have been met. • Indicate the milestone or activity that will denote that the project results have been implemented. • Indicate testing and specification and standards changes that will be required to implement the results of the project, if applicable.		
Risk Assessment	The critical activities/events have been identified for the proposed ManTech project. Their probability, severity, potential effect, and proactive mitigation measures are summarized in a tabular form, to include risks to full transition and implementation.		
Benefits/Cost Reductions	This section of the PPD should provide the anticipated benefits of the project, including a description of the expected reductions in cost, lead time, weight, or cycle time and improvements in performance, reliability, maintainability, or availability; etc. Cite the applicable aircraft lot buy or hull number targeted for implementation. OEMs should utilize the ManTech Return on Investment Calculation guidance, and include a five-year return-		

	on-investment calculation to help quantify the effort.. The evaluation should be as quantitative as possible and substantiate any and all assumptions used in the business case.		
Deliverables	Both program specific and project specific deliverables that will aid with tracking financial costs, technical progress, and implementation/transition are reasonable and adequate for the proposed scope of work.		
Schedule	Project Schedule (e.g., Gantt Chart) shows anticipated project schedule for each listed phase, task and subtask.		

Satisfactory ☐ Marginal ☐ Unsatisfactory ☐

Justification:

Affordability – The proposed solution describes the new or improved process, method, or equipment that will be demonstrated, and when implemented, will satisfy the manufacturing technology need. This factor reflects the degree to which the proposed technology concept minimizes acquisition and total ownership cost. The technology concept must be developed with the goal of developing a system that will be affordable for the Navy to procure and operate. Consideration will also be given to the following:

- Total Acquisition Cost: The degree to which commercial off-the-shelf (COTS) components and non-proprietary technology are used
- Operating Workload: The number of people, responsibilities, and special training required
- Maintenance Workload: The number of people, responsibilities, special tools, and special training required

Satisfactory ☐ Marginal ☐ Unsatisfactory ☐

Justification:

Innovation – This factor reflects the innovativeness, quality and cost-effectiveness of the proposed technical design and its uniqueness with respect to current industry practice. Projects should press the state of the art while still having credibility with regard to technical approach. The enabling nature of the technology should be apparent.

Satisfactory ☐ Marginal ☐ Unsatisfactory ☐

Justification:

Management Plan – This section should address the overall management approach and team organization. Overall project duration, including discrete phases and associated metrics for making a determination to proceed from one phase or go/no-go decision point to another. Each phase will require milestones that relate to specific deliverables during the phase. Milestones or "observable technical events" mark the completion of a significant portion of the project. An appropriate number of milestones and criteria by which their completion will be determined should be provided by the proposer. For projects with multiple phases, the key metrics that will be used to make a determination to continue from one phase to another, or stop the project; commonly referred to as GO/NO-GO metrics, should be identified. Projects with only one phase do not require go/no-go decisions and associated metrics during the execution of the project phase. However, this does not preclude including go/no-go decision points and associated metrics where appropriate during the phase when significant task completion is required prior to commencing another task within the phase.

Satisfactory ☐ Marginal ☐ Unsatisfactory ☐

Justification:

Cost Realism – The objective of this area of evaluation is to assess the ability of the proposer to execute the proposed project with the financial resources proposed and to achieve project objectives. Summary cost data is provided to the technical reviewers to support their assessment of cost realism. Estimates are "realistic" when they are neither excessive nor insufficient for the effort to be accomplished. Estimates must also be realistic for each phase of the proposed project when compared to the total proposed cost. Determination will be made by directly comparing proposed costs with cost estimating relationships, comparable current and historical data, evaluator experience, available estimates, etc. Proposed estimates will be compared with the corresponding technical proposals for consistency.

Satisfactory ☐ Marginal ☐ Unsatisfactory ☐

Justification:

Additional Comments (as needed)

1.

2.

3.

Post Technical Proposal Evaluation Activities: NSAM shall capture all the elements of the Project Plan rated as 'Marginal' or 'Unsatisfactory' for a specific proposal. These elements will be submitted to the OEM(s) for clarification or resolution. Once the 'Marginal' or 'Unsatisfactory' evaluations have been addressed to the satisfaction of the reviewers and NSAM management, the complete Project Plan will be forwarded to the Office of Naval Research for review.