

The Evaluation Guide which follows has been extracted from the following publication by Terry Davenport.



**PUBLIC
PROCUREMENT
SERVICES**

REQUEST FOR PROPOSALS

DEVELOPMENT

TEMPLATE

Spring 2013 Edition

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Terry Davenport
© Public Procurement Services, 2007
27 Calle Cascabela
Santa Fe, New Mexico 87508
505-955-0603(o) 505-470-1428(c)
Tdavenport27@comcast.net

EVALUATION GUIDE

PROFESSIONAL SERVICES TIME AND MATERIALS

[INSERT GOVERNMENTAL ENTITY NAME]

[INSERT PURCHASING AGENCY NAME]

[INSERT SEAL]

REQUEST FOR PROPOSALS

RFP: [INSERT #]

[INSERT RFP TITLE]

[INSERT ISSUE DATE]

PROPOSAL DUE:
Date and Time

PROCUREMENT DEPARTMENT
[Address]

CONTACT: name
PROCUREMENT DEPARTMENT
[Phone number]
[Email]

Objective

The Agency is requesting proposals from qualified Offerors to provide professional services to

This solicitation shall result in a single source award.

Evaluation Guide Goal/ Purpose

The main purpose of this Guide is to ensure that the proposals received in response to the RFP are evaluated fairly and completely, with input from all major stake-holders, within the guidelines provided by the Chief Procurement Officer and the Chief Information Officer, if applicable.

The resulting deliverable will be an Evaluation Report indicating the preferred proposal and the reasoning behind the selection. The results and recommendations from this evaluation will be presented to the Executive Sponsor and the Chief Procurement Officer.

Evaluation Guide Deliverables

As a result of the evaluation procedures described in this Guide, the evaluation Committee will deliver the following:

1. Evaluation Report

This report will document the final recommendations that result from the evaluation process. It will summarize the content of the proposals, key points differentiating each, and the scoring each achieved related to the specifications outlined in the RFP. It is anticipated that this document will identify the preferred proposal, the main reasons for selecting the proposal, the current state of negotiations, and will recommend that negotiations be completed. The report will be drafted by the Procurement Manager based upon the evaluation and recommendations of the Evaluation Committee. The report will be reviewed and signed by each member of the Evaluation Committee before it is presented to management.

2. Presentation to Management

The Procurement Manager will present the Evaluation Committee Report including Evaluation Committee recommendations to the Executive Sponsor and Chief Procurement Officer.

Project Scope

1. Offerors have been requested to propose solutions in response to the issued RFP.
2. As proposals shall be evaluated and scored during Evaluation Committee scoring sessions. In addition the Procurement Manager will compile a list of issues and

questions related to the proposals which will be used as the basis for the best and final notification letters to each finalist Offeror.

3. All Committee members will attend finalist Offeror's presentation and demonstrations and score the results in the following Evaluation scoring session. .
4. All Committee members will jointly score the Finalist Offerors proposal amendments and contribute to the final consensus recommendation contained in the Evaluation Report.

Project Strategy and Process Flow

The Overall Evaluation Process

Phase 1

1. There shall be a two-step selection process. First, the Evaluation Committee shall score and rank the proposals submitted using the Evaluation Methodology adopted by the Chief Procurement Officer. The methodology combines the "best value" evaluation process with the evaluation against a predetermined yardstick for weighted evaluation factors and subfactors in accordance the contents of the RFP document. This is unquestionably the best practice evaluation methodology to use for this competitive solicitation.

Phase 2

2. The finalist, short listed Offerors, will be provide a notification letter inviting the finalist Offerors to present and demonstrate their solutions to the Evaluation Committee and to submit a Best and Final Offer that may amend selected portions of their proposals.

The Evaluation Committee will complete its scoring and the Evaluation Report will be presented to the Executive Sponsor. One or more of the highest scoring proposals will be selected for negotiation of appropriate contract.

Strategy

The evaluation will consist of the follow steps:

1. Each proposal will be reviewed to ensure that all mandatory requirements have been met. Proposals failing to meet one or more mandatory requirements will be eliminated from further consideration. The mandatory proposal requirements are listed in the Mandatory Requirements Checklist.
2. The Past Performance Questionnaire will be distributed to the selected references in each Offeror's proposal.
3. The Evaluation Committee will review each proposal and determine if any clarifications are required. If so, Offerors will be contacted and clarifications shall be obtained by the Procurement Manager. During this time, the Procurement

Manager may, at his/her option, initiate discussion with Offerors who submit responsive or potentially responsive proposals for the purpose of clarifying aspects of the proposals, but proposals may be accepted and evaluated without such discussion. In conducting discussions, there shall be no disclosure of any information derived from proposals submitted by competing Offerors.

4. The Evaluation Committee will receive the completed Past Performance Questionnaire and score them and every evaluation factor by subfactor as prescribed by the Evaluation Methodology and in accordance with the evaluation factor and relative weights found in Section V of the RFP.
5. Based on the scoring of the proposals submitted, the Evaluation Committee shall prepare a short-list of those proposals which are judged as being capable of providing an acceptable solution.
6. The Offerors on the short-list will be required to give a presentation and demonstrate their proposed systems to the Evaluation Committee and scored accordingly.
7. Amended proposals submitted in response to Best and Final Offer will be re-assessed using the same evaluation criteria and scoring mechanisms that were used to score the original proposals. The scores will then be finalized.
8. The Evaluation Committee or portions thereof may make an optional site visit to validate Offeror claims for system performance and functionality.

Project Process Flow

1. **RFP Evaluation Planning/Training Session** **Date**
 This is the initial planning session with all Committee members expected to attend. The objective of this planning session will be to ensure that all Committee members are aware of what is expected of them (their roles and responsibilities) and the schedule that must be adhered to for successful completion of this project. Of special interest will be the criteria that have been developed to assist Committee members in evaluating the proposals which shall be reviewed and adopted by the Evaluation Committee. Each Evaluation Committee member will be required to read and sign the Evaluation Committee Member's Declaration..
2. **Proposal Opening** **Date**
 RFP responses that have been received by the proper closing date will be opened.
3. **Mandatory Compliance Review** **Date**
 Each proposal will be reviewed to ensure that all mandatory requirements have been met. Proposals failing to meet one or more mandatory requirements will be eliminated from further consideration. The mandatory proposal requirements are

listed in the Mandatory Requirements Checklist.

4. Distribution of Past Performance Questionnaire **Date**

Past Performance Questionnaires will be distributed to the references for responsive Offeror's proposal.

5. Terms and Conditions Review **Date**

The Offeror terms and conditions shall be extracted from each responsive proposal and delivered to the General Counsel for review.

6. Proposal Cost Review **Date**

The Offeror cost response forms with explanations shall be extracted from each responsive proposal and reviewed by an individual or individuals assigned by the Procurement Manager.

7. Proposals Review **Date**

Room _____ at the office building located at _____ has been reserved for proposal evaluation. Offeror proposals and any related materials shall not be removed from this room without the prior consent of Procurement Manager or Deputy Procurement Manager. The Evaluation Committee shall review each proposal and determine if any clarifications are required. Requests for clarification shall be submitted to the Procurement Manager.

8. Proposal Scoring Sessions **Date**

All Evaluation Committee scoring will be conducted in a group setting in accordance with the Evaluation Methodology. Scoring will be conducted horizontally by subfactor and evaluation factor as set forth in the RFP the Evaluation Worksheet. Evaluation Committee members shall be required to attend all scoring sessions.

The following evaluation factors will be scored during this scoring session:

9. Receive Past Performance Questionnaires **Date**

The Procurement Manager shall receive past performance questionnaires and prepare them for review by the Evaluation Committee.

10. Second and Final Scoring Sessions **Date**

The Evaluation Committee will complete the scoring of all factors including costs and draft its recommendations for the selection of finalists. The following evaluation factors will be scored during this scoring session:

11. Evaluation Results and Recommendations

Date

The Procurement Manager will prepare the evaluation results and recommendations for presentation to the Executive Sponsor and the Chief Procurement Officer.

12. Selection of Finalists

Date

The Executive Sponsor shall select and the Procurement Manager will notify the finalist Offerors of their selection. The schedule and location of finalist Offeror presentations and demonstrations will be determined by lottery at this time.

13. Terms and Conditions Review Results

Date

The Procurement Manager will take the review results from the General Counsel and begin incorporating those results in the Finalist Notification Letters

14. Finalist Notification Letters

Date

The Procurement Manager will prepare and distribute individual Finalist notification letters. Each letter will contain all of the appropriate following paragraphs:

- The date, time and location of the proposal presentation or system demonstration, along with instructions as may be appropriate for the conduct of the session including an agenda.
- Specific areas of the Offeror's proposal that the Evaluation Committee may **request** to be addressed as part of the submission of best and final offers. For example, the Evaluation Committee may request that the Offeror readdress important aspects of the proposal such as the implementation schedule, level of support, type or amount of resources proposed, or contract terms and conditions.
- Specific areas of the Offeror's proposal that the Evaluation Committee may **require** to be addressed as part of the submission of best and final offers. For example, unacceptable terms and conditions may have to be amended or withdrawn as part of a best and final offer. Confidential or proprietary designations on non-proprietary portions of an Offeror's proposal must be removed. Unacceptable licensing or other restrictions on the use of the product must be eliminated through a best and final offer amendment.
- The due date and time for submission of best and final offers.
- The final paragraph shall emphasize the fact that the best and final offer is an opportunity for the Offeror to improve the proposal by submitting revised proposed costs as well as other amendments.

15. Accept Best and Final Offeror

Date

The Procurement Manager will accept best and final Offeror and prepare them for the Evaluation Committee.

16. Presentation and Demonstrations

Date

The finalist Offerors shall present their proposal and demonstrate [Tools/ Techniques/ Proposed Systems, if appropriate] to the Evaluation Committee. The sessions will be conducted in accordance with the Presentation and Demonstration Agenda. The individual presentations and demonstrations shall be scored at the conclusion of each presentation and demonstration. Additional presentation and demonstration sessions may be scheduled depending upon the number of finalists selected.

17. Finalize Scores

Date

The Evaluation Committee shall score all best and final Offerors, finalize all scores and recommendations concerning the selection of the best value proposal.

18. Selection of Contractor

Date

The Procurement Manager shall present the Evaluation Report to the Executive Sponsor and Chief Procurement Officer for the selection of the Apparent Successful Offeror who shall be notified of the apparent selection by the Procurement Manager. The Procurement Manager shall schedule contract finalization at this time.

19. Finalize Contract

Date

The contract will be finalized with the apparent successful Offeror.

20. To Chief Procurement Officer

Date

After review and approval by the Chief Information Manager, if appropriate, the Award Recommendation Letter, Evaluation Report and approved contracts shall be delivered to the State Purchasing Agent of award.

21. Award

Date

The contract shall be awarded by the Chief Procurement Officer.

22. Award Notification Letters

Date

The Procurement Manager will prepare and distribute the award notification letters to all Offerors triggering the protest period.

23. Protest Period Expires

Date

Roles and Responsibilities

Responsibilities for All Committee Members

1. An Evaluation Committee member plays an active role in the selection of the contractor(s).
2. An objective process will determine the best overall contractor(s).

3. Evaluation criteria are items of importance that will be considered when reviewing the proposal of each Offeror. The evaluation criteria and weights have been included in the Request for Proposal (RFP) documents. The detailed breakdown of how points will be assigned (Proposal Evaluation Worksheet) shall be set prior to the proposal opening.
4. During the RFP evaluation process, the Procurement Manager is the ONLY person authorized to release results or communicate with the Offerors. All requests for further information or clarification must be forwarded to the Procurement Manager.
5. All proposals and corresponding information must be kept under lock and key after working hours.
6. All proposals and corresponding information are CONFIDENTIAL. This information is not to be discussed with anyone outside the Evaluation Committee.
7. While serving as an Evaluation Committee member, all possible perceived or actual conflicts of interest will be disclosed promptly to the Procurement Manager.
8. The General Counsel or representative will review and provide advice on contract terms and conditions.
9. Each Committee member is responsible to review each proposal, attend all Evaluation Committee proposal scoring sessions, and attend every finalist presentation and demonstration.
10. Members of the using purchasing agency's Information Technology Section will be providing technical assistance with the preparation of demonstration data and other technical matters as directed the Procurement Manager, but they will not score the Offeror proposals.
11. Designated subject matter experts will be available to advise the Evaluation Committee of technical matters but they are not involved in the scoring of Offeror proposals.
12. *The integrity of the RFP process shall be beyond reproach.*

Evaluation Committee

The Evaluation Committee is comprised of [Number] evaluators who will contribute to the scoring. Name, Procurement Manager, will manage and support the evaluation process. The Procurement Manager will oversee the evaluation process to ensure fairness within the process.

EVALUATION COMMITTEE MEMBERS

Department	Name

SUBJECT MATTER EXPERTS

Role	Name

Proposal Evaluation Process Summary

1. Initial Review (Tasks 1 –10)

All proposal scoring will take place as a group and individual scores will be averaged to obtain Offeror scores. Individual score sheets will not be maintained. The scoring will be conducted horizontally by subfactor within evaluation factor where appropriate. In this way the proposals will be scored against each other to obtain the best value and against the criteria set forth in the RFP and the Evaluation Worksheet..

An Excel spreadsheet(s) will also be prepared to record the average scores by subfactor for each Offeror. The spreadsheet(s) will be an attachment to the Evaluation Report.

2. Offeror Presentations (Tasks 14 -16)

The Executive Sponsor and/or Chief Procurement Officer will decide which Offerors are requested to present their proposals and demonstrate their systems to the Evaluation Committee and accordance with the Presentation/Demonstration Agenda.

An evaluation guide shall be prepared prior the presentation and demonstration sessions. The sessions have three parts:

- Offerors present their proposals.
- Offerors demonstrate their [Tools/Techniques/Systems, if applicable].
- Offerors answer Evaluation Committee member questions. Evaluation Committee members will be asked to prepare a list of questions for each Offeror. Additional questions may also arise during the presentation themselves.

The presentations and demonstrations shall be scored at the conclusion of the session.

3. Final Scores (Task 17)

The Evaluation Committee shall score all best and final Offerors including all proposal amendments, finalize all scores and recommendations concerning the selection of the best value proposal.

4. Recommendation Report (Tasks 15 – 17)

As a result of the evaluation process, a Evaluation Report will be developed by the Procurement Manager. The Evaluation Report will document the results of the evaluation and may include Evaluation Committee recommendations. The final report shall be signed by all Evaluation Committee members and it will become a public document after contract award.

The Procurement Manager will present the Evaluation Report to the Executive Sponsor. The Evaluation Committee will be disbanded after that presentation.

Evaluation Committee Documents and Worksheets

1. Evaluation Committee Member's Declaration

This form was discussed with and signed by all Evaluation Committee members prior to their appointment to the Evaluation Committee.

2. Mandatory Requirements Checklist

This form shall be used to verify compliance with the mandatory requirements prior to making the proposals available to the Evaluation Committee members.

3. Past Performance Questionnaire(s)

This questionnaire will be distributed to Offeror references. The Evaluation Committee will agree to the evaluation methodology prior to scoring.

4. Proposal Evaluation Worksheet

This worksheet will be approved by the Evaluation Committee prior to making the proposals available to the Evaluation Committee members.

5. Proposal Evaluation Spreadsheet

This spreadsheet will be used to record averaged evaluation scores.

6. Presentation and/demonstration Agenda

This document will be distributed along with the user agency demonstration data to all Offerors on Date, if appropriate.

7. Presentation and Demonstration Evaluation Worksheet

This worksheet will be approved by the Evaluation Committee prior to the finalist Offeror presentations and demonstrations.

Evaluation Guide Approval

Approved by:

<u>Role</u>	<u>Name</u>	<u>Signatures</u>	<u>Date</u>
Executive Sponsor			
Chief Procurement Officer			

1. EVALUATION COMMITTEE MEMBER DECLARATION

This is to clarify that I have no interest, and will acquire no interest, in any person or in any firm, corporation or other business entity that competes for any contract with the [Governmental Entity Name] or is a current contractor, nor have I participated, directly or indirectly, by committee or as a consultant, advisor, employee, manager, director, agent, trustee, or otherwise, in the development, implementation, or administration of any competitive procurement process with any firm in which I have a interest. For purposes of this declaration, I understand "interest" to include any consideration or other thing of economic value, including future consideration.

This is to also certify that I fully understand the confidential nature of the competitive procurement process and the obligation imposed by statute and ordinance to ensure a competitive process that not only operates in fair and equitable manner, but that appears to be fair as well. I agree, therefore, to maintain the confidences necessary to prevent unfair advantages to any offeror or contractor engaged in a competition for [Governmental Entity Name] dollars and to further abide by all rules and prohibitions issued by Procurement Department as they relate to conflict of interest and confidentiality. I understand that threshold prohibitions include the discussion, evaluation, scoring, or status of any proposal(s), action(s) affecting any proposal(s), as well as the copying and/or dissemination of any portion of any proposal, or of any information designated by a offeror as confidential to any person, firm, corporation, or other business entity, at any time prior to, during or after the procurement process. I also understand that I may be disqualified from individual or group participation as a evaluator if I conduct myself in any manner that would create even the appearance of bias or unfair advantage with, or on behalf of any competitive procurement contractor, potential contractor, agent, subcontractor, or other business entity, whether through direct association with contractor representatives, indirect associations, through recreational activities, or otherwise.

Print Name: _____

Title: _____

Signed this _____ day of _____ Year _____.

2. MANDATORY REQUIREMENTS CHECKLIST

OFFEROR NAME: _____

VERIFIED BY: _____

Note: Insert the Mandatory Requirement Checklist from the RFP here.

**OFFEROR
PAST PERFORMANCE/REFERENCE
QUESTIONNAIRE**

RFP NO: _____

RFP Title: _____

**PLEASE RETURN THIS COMPLETED QUESTIONNAIRE TO THE PROCUREMENT
MANAGER AT**

Email: _____

By: _____

Offeror's Name: _____

Reference Company Name: _____

**Please include the name, title and telephone number of the person who is completing this
questionnaire**

Name: _____ Telephone Number: _____

Title: _____

1. Please briefly describe the type of services performed for your organization by the offeror. (Name of project, types of services performed -- analysis, training, technical support, etc),

2. Were any unique techniques or tools employed for the delivery of the services? Were the tools/techniques employed effectively?

Comment: _____

3. How would you rate the Offeror's ability to learn/understand your organization's or the project needs/requirements?

- Excellent (Score 10 points)
- Very Good (Score 8 points)
- Good (Score 5 points)
- Poor (Score 0 points)

Comment: _____

4. How would you rate the offeror's knowledge and experience in providing the requested technical services?

- Excellent (Score 10 points)
- Very Good (Score 8 points)
- Good (Score 5 points)
- Poor (Score 0 points)

Comment: _____

5. How would you rate the offeror's ability to identify and recommend resolutions to problems or issues?

- Identified and recommended quickly (Score 10 points)
- Identified and recommended slowly (Score 8 points)
- Identified but not recommended (score 5 points)
- Were ignored (Score -0 points)

Comment: _____

6. Quality of Services:

How would you rate the overall quality of the offeror's technical services?

- Excellent (Score 10 points)
- Very Good (Score 8 points)
- Good (Score 5 points)
- Poor (Score 0 points)

Comment: _____

7. Do you recall the name(s) of the offeror's employees who performed services under your contract? If so, please provide names below.

8. Overall Performance:

On a scale of 0 to 10, how would you rate the offeror's OVERALL PERFORMANCE?
(Score based upon # of points – 10 points max)

Do you have any additional comments?

9. Would you enter into a contract with this offeror again? If not, why not?

Comment: _____

10. Are you aware of any other company or organization this individual has done work for?
If so, do you have a contact name and phone number?

- Name:
- Phone Number:

11. Do you have any additional comments that might assist us in evaluating the offeror's past performance?

Comment: _____

INDIVIDUAL PAST PERFORMANCE/REFERENCE QUESTIONNAIRE

RFP NO: _____

RFP Title: _____
INDIVIDUAL

**PLEASE RETURN THIS COMPLETED QUESTIONNAIRE TO THE PROCUREMENT
MANAGER AT**

Email: _____
By: _____

Offeror's Name: _____

Proposed Individual's Name: _____

Reference Company Name: _____

**Please include the name, title and telephone number of the person who is completing this
questionnaire**

Name: _____ Telephone Number: _____

Title: _____

1. Please briefly describe the type of work that was performed for your organization by this individual.

2. At the onset, how well did this individual understand the scope of work that you want performed?

Excellent (Score 10 points)
Very Good (Score 5 points)
Good (Score 3 points)
Poor (Score 0 points)

3. What did you like best about the individual?

4. _____
What did you like least about the individual?

5. How would you rate this individual's communication and interpersonal skills?

- ___ Excellent (Score 10 points)
- ___ Very Good (Score 5 points)
- ___ Good (Score 3 points)
- ___ Poor (Score 0 points)

Comment: _____

6. How would you rate this individual's technical skills related to your project?

- ___ Excellent (Score 10 points)
- ___ Very Good (Score 5 points)
- ___ Good (Score 3 points)
- ___ Poor (Score 0 points)

Comment: _____

7. How would you rate this individual's ability to identify and recommend resolutions to issues/problems?

- ___ Excellent (Score 10 points)
- ___ Very Good (Score 5 points)
- ___ Good (Score 3 points)
- ___ Poor (Score 0 points)

Comment: _____

8. How accurate were this individual's estimates for work products/deliverables?

- ___ Excellent (Score 10 points)
- ___ Very Good (Score 5 points)
- ___ Good (Score 3 points)
- ___ Poor (Score 0 points)

Comment: _____

9. On a scale of 0 to 10, how would you rate the individual's OVERALL PERFORMANCE? (Score based upon 1.5 times the # of points – 15 points max)

Comment: _____

10. How would you rate the contract deliverables prepared by this individual?
- Thorough and on time (Score 10 points)
 - Thorough, but usually late (Score 5 points)
 - On time, but incomplete (Score 1 points)
 - Consistently late and incomplete (Score -0 points)

Comment: _____

11. Would you enter into a contract with this offeror and individual again? If not, why not?

Comment: _____

12. Are you aware of any other company or organization this individual has done work for? If so, do you have a contact name and phone number?

- Name:

- Phone Number:

13. Do you have any additional comments that might assist us in evaluating the proposed individual's past performance?

Comment: _____

PROPOSAL EVALUATION WORKSHEET

Offerors were instructed to provide a thorough written response and/ or a reference to an appropriate paragraph(s) in supporting technical documentation for each specification. The proposal response should follow the order in which the specifications are listed.

Scoring Methodology: All scoring will be conducted in group scoring sessions. Proposals will be scored horizontally by evaluation subfactor. The individual Evaluation Team member scores will be averaged to obtain final scores.

Note: Example weighted evaluation metrics have been provided. Review and customize as appropriate to meet the needs of the procurement.

RFP SPECIFICATION	EVALUATION CRITERIA
<p>I. Offeror's Company Experience</p> <p>Offerors shall submit a statement of relevant company experience, including experience of subcontractors, if applicable. The documentation shall thoroughly describe how the Offeror has supplied expertise for similar contracts and work related to _____.</p>	<p>I. Company Experience (100 points)</p>
<p>a. Offerors shall include an overview the company including a summary the company history including the company history of subcontractors, if applicable. The overview shall include type of organization and the state of origin, the date established, location of headquarters and other offices, number and location of employees and a description of types of services offered.</p>	<p>a. Company information – (No Points)</p>
<p>b. Offerors should include in their proposals documentation describing the extent of their knowledge, experience, and expertise as a provider of professional services for _____.</p>	<p>b. Experience - Up to 35 point will be awarded based upon and evaluation of the documented company experience including subcontractors, if applicable, on similar projects and engagements Quality of documentation – Up to 5 points Years of experience – Up to 15 points Breadth of experience/ knowledge – Up to 15 points</p>
<p>c. Offerors should include in their proposals documentation of the extent of their knowledge regarding the following specific (programs/technology) _____ _____ _____</p>	<p>c. Knowledge – Up 35 points will be awarded based upon an evaluation of the extent of their documented knowledge of [programs/technology] for the project. Quality of documentation – Up to 5 points Years of experience – Up to 15 points Breadth of knowledge – Up to 15 points</p>
<p>d Offerors should thoroughly describe the applicability and availability of qualified resources that may be</p>	<p>d. Resources - Up to 15 points will be award based upon an evaluation of the applicability</p>

<p>employed for the project..</p>	<p>and availability of the Company resources that may be employed for the project. Very Limited - Up to 5 points Somewhat Limited – Up to 10 point Many - Up to 15 points</p>
<p>c. Offerors should include their proposal copies of appropriate professional certifications and/or other documented credentials.</p>	<p>e. Certifications - Up to 15 points will be award based upon an evaluation of the applicability of provided certifications or other credentials to the needs of the project. Applicability - Up to 10 points Number/Type – Up to 5 points</p>
<p><u>2. Offeror's Company Past Performance/References</u></p> <p>Offeror's proposals shall include [Two or Three] external references from clients who are willing to validate the Offeror's past performance on similar contracts. The reference contact person will be expected to complete and return the Past Performance Questionnaire to the Evaluation Committee within one (1) week from the date the questionnaire is emailed to the recipient. The failure of a reference contact person to return or thoroughly complete the questionnaire will result in a reduction of points awarded for this evaluation factor. The minimum information that shall be provided for each client reference follows:</p> <p>At least ONE of the references for the proposed professional services must be from a site of comparable or larger size where [] professional services have been provided. If a subcontractor is going to provide [] percent] or more of the proposed professional services, past performance references shall also be provided in the proposal. Offerors are encouraged to include additional references that they believe the Evaluation Committee would find helpful in thoroughly evaluating their past performance.</p>	<p><u>2. Company Past Performance/References (50 points)</u></p> <p>Points for company references will be awarded based upon an evaluation of the offeror's work for previous clients receiving similar services to those proposed by the offeror for this contract. Scored based upon the completed questionnaires - Averaged</p>
<p><u>3. Offeror's Proposed Key Personnel Experience and Qualifications</u></p> <p>Offerors shall submit resumes of all proposed Key Personnel, see Section I paragraph F Definitions, who will be performing services under the contract. Experience narratives shall be attached that describe the specific relevant experience of the Key Personnel members in relation to the role that member will perform for this contract. The narrative(s) shall include the name of the individual(s) proposed and should include a thorough description of the education, knowledge, and relevant experience as well as certifications or other professional credential that clearly shows how they meet and/or exceed the Agency's minimum experience requirements as follows: Note: Delete if minimum requirements have not been established or are</p>	<p><u>3. Staff Experience (250 points)</u></p> <p>Points for staff experience will be awarded based upon an evaluation of each staff member's experience as it relates to their proposed role and the needs of this contract.</p> <p>Note: Given the fact that offerors may propose differing numbers of individuals, the best approach is to score each individual proposed on the 225 scale and average the results to obtain the final score for the offeror.</p> <p>Scoring Metric: Years of Experience - Up to 50 points. Documented Knowledge - Up to 50 points. Documented Education - Up to 50 points. Document Relevant Experience - Up to 50</p>

<p>unnecessary for the project</p> <p>Propose personnel members shall have a minimum of ___ years of experience with/of _____.</p> <p>Proposed personnel member shall have _____ certifications or professional credentials.</p>	<p>points.</p> <p>Certifications and Professional Credentials- Up to 25 points.</p>
<p>4. Offeror's Key Proposed Personnel Past Performance/References</p> <p>Offeror's shall include [Two or Three] external client reference who are willing to validate the individual's past performance on similar engagements for each proposed Key Personnel, see section I paragraph F, Definitions .</p> <p>The reference contact person will be expected to complete and return the Past Performance Questionnaire to the Evaluation Committee within one (1) week from the date the questionnaire is emailed to the recipient. The failure of a reference contact person to return or thoroughly complete the questionnaire will result in a reduction of points awarded for this evaluation factor. The minimum information that shall be provided for each client reference follows:</p>	<p>4. Individual Past Performance/References (75 points)</p> <p>Points for individual references will be awarded based upon an evaluation of the individual's work performed for previous clients receiving similar services to those proposed for the staff member for this contract.</p> <p>Scoring based upon the completed questionnaires - Averaged</p>
<p>5. Project Plan</p> <p>Offerors shall submit a thorough project plan as part of the proposal. At a minimum, the project plan shall include a milestone chart including tasks to be performed, the time frame and proposed staff member designated for the completion of each task. The plan should clearly differentiate the on-site versus off-site services hours as well as Agency resources versus Offeror resources.</p>	<p>5. Project Plan (50 points)</p> <p>Points will be awarded for this evaluation factor based upon the quality and thoroughness of the project plan as well as the proposed division of work performed on-site and off-site as well as the division between Agency resources versus Offeror resources.</p> <p>Thoroughness of Task List – Up to 15 points Realistic Milestones – Up to 15 points Realistic On-Site/Off-Site Resource Allocation – Up to 10 points Realistic Agency/Offeror Resource Allocation – Up to 10 points</p>
<p>6. Samples of Work Products/Tools and Techniques</p> <p>Offerors shall provide samples of relevant work products provided to previous clients. Samples of the work products should be included in Binder 3 of their proposals. Offerors shall provide a thorough description of any tools and or proven techniques that may be employed for [_____]</p>	<p>Work Products – Up to 50 points will be awarded based upon an evaluation of the applicability and quality of the provided samples of work performed for previous clients.</p> <p>Applicability – Up to 15 points Quality – Up to 35 points</p> <p>Tools/Techniques – Up to 50 points will be award based upon an evaluation of the applicability of any proposed tools and techniques to be used for the project.</p> <p>Applicability (up to 50 points)</p>
<p>8. Cost</p> <p>Offerors shall propose two firm, fixed, fully-loaded hourly rates</p>	<p>Cost Specifications</p>

<p>per service category on the proposal cost form in Appendix C. The on-site firm, fixed, fully-loaded hourly rate will include travel to and from the off-site workplace to the on-site workplace. The proposed on-site fully-loaded hourly rates shall include travel, per diem. Both hourly rates shall include fringe benefits and any overhead costs for contractor personnel, as well as subcontractor personnel if appropriate.</p> <p>The service categories are as follows:</p> <p>a. _____</p> <p>b. _____</p> <p>c. _____</p>	<p>For the purpose of evaluating proposals, the following formula shall be use for the calculation of average hourly rate:</p> <p>[Number] times the off-site plus [Number] times the on-site hourly rate divide by [Number] equals the average hourly rate for use in the following formula.</p> <p>The evaluation of each offeror's cost proposal will be conducted using the following formula:</p> $\frac{\text{Lowest Responsive Offer Average Hourly Rate}}{\text{This offeror's Average Hourly Rate}} \times 300 = \text{Award Points}$ <p>Calculation to be performed by Procurement Manager.</p>
<p>9. Proposal Presentation</p> <p>If selected as a finalist, offerors agree to provide the Evaluation Committee the opportunity to interview proposed staff members identified by the Evaluation Committee in the finalist notification letter at the proposal presentation. A statement of concurrence is required.</p>	<p>Proposal Presentation (100 points)</p> <p>Points for the proposal presentation will be awarded based upon an evaluation of the qualifications of the proposed staff. Effective communication, technical knowledge, experience with similar contracts and the quality of the responses to questions will be the principle criteria for the evaluation. Proposed tools or techniques will be evaluated based upon the applicability to the project.</p> <p>Effective Communications – Up to 20 points Demonstrated Knowledge– Up to 20 points Applicable Experience – Up to 20 points Response to Questions – Up to 20 points Tool and/or Techniques – Up to 20 points</p>

5. Proposal Evaluation Spreadsheet

This spreadsheet will be used to record averaged evaluation scores.
 Insert Here

6. Presentation and/demonstration Agenda

EXAMPLE PROPOSAL PRESENTATION AGENDA

RFP NO: _____

RFP Title: _____

PROPOSAL PRESENTATION/DEMONSTRATION AGENDA

Location: _____

Date: _____

Beginning at: _____

Procurement Manager: (10 minutes)

Introduction/Ground Rules

The session shall limited to a total of three hours in duration including questions and answers.

Introduction of the Evaluation Committee and guests.

Offeror: (Two Hour Limit)

Introduction of Key Personnel

Proposal Overview:

Company Experience

Proposed Key Personnel Experience and Qualifications

Project Approach and Plan

Presentation/Demonstration of Tools and/or Techniques

Best and Final Offer Review (if one is submitted)

Evaluation Committee Questions (30 Minutes)

Offeror: Summary/Wrap Up (15 minutes)

Procurement Manager: Session Close (5 minutes)