## State of Utah **Division of Purchasing**



# Request for Proposal (RFP) Manual

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#### Introduction

#### SO, YOU WANT TO DO AN RFP?

A Request for Proposal (RFP) is one of several procurement tools. The State Purchasing agent will determine if the RFP process is appropriate. Generally, most products and services can be procured through the Invitation to Bid or a Multi-Step Bid process. At times, the RFP process may be a better tool. Among the criteria the Purchasing agent will consider are:

- Specifications or the needs of the agency cannot be clearly defined
- The agency has defined a need and requests the Offerors to propose the best method for accomplishing it.
- Cost is only one criterion in determining the award and needs to be weighed against other factors in determining the best value.
- Other factors as deemed appropriate by Purchasing.

#### **Proposal Evaluation Committee Guidelines**

#### **Chairperson Responsibilities and Duties**

- A. **Coordinate the development of the RFP** using the <u>RFP Template</u>. This should be done in conjunction with the evaluation committee. Include the evaluation committee in the development and weighting of the evaluation criteria. The committee chairperson is the person listed as the contact person for RFP related questions. This person coordinates the project through completion of the procurement process.
- B. Select evaluation committee members. Evaluators may include:
  - a. Employees of the Department
  - b. Knowledgeable employees or consultants from other departments or organizations.

The Division of Purchasing will provide procurement guidance and support, but generally will not serve as an evaluator.

C. Review all proposals received from State Purchasing to determine if they are acceptable, potentially acceptable, or unacceptable. This may be done in conjunction with the whole evaluation committee or with a subcommittee. Immediately notify State Purchasing in writing of the proposal(s) determined to be unacceptable and the reason for that rating. Provide details including a reference to the specific section(s) of the RFP specifications in which the offeror did not meet. State Purchasing will notify the vendor immediately in order to expedite any potential dispute.

Note: If an offeror indicates that the entire proposal is protected, confidential, or proprietary (may be listed in the footer), you must notify the (added) State Purchasing agent immediately. The offeror may be dis-qualified, or the State Purchasing Agent may seek a clarification to have the restriction removed. Also, the offeror may have exceptions to specific terms and conditions. This is not necessarily a reason to disqualify the offeror, but State Purchasing is to be notified.

- D. Committee Chair and State Purchasing Agent will conduct initial evaluation committee meeting to:
  - Ensure that each evaluator reads, understands and signs the "Evaluator Confidentiality and Conflict of Interest Certification" form prior to evaluation.
  - 2. Instruct evaluators that they are not allowed to discuss the proposal evaluation process with anyone other than the actual evaluation committee. Gather signed statements from evaluators. Send signed statements to Purchasing Agent prior to evaluation.

- Distribute technical proposals (without cost) and a copy of the RFP to evaluators
- 4. Distribute score sheets to evaluators for each proposal received.
- 5. Discuss evaluation methodology with evaluators to ensure that everyone is in agreement as to the meaning of each criterion.
- 6. Instruct evaluators that they are to limit the evaluation of the proposals to what is provided in the proposal. Information not contained within the written offer is not to be considered unless it is specific to a reference obtained as part of the solicitation.
- 7. Schedule subsequent committee evaluation meetings. Serve as facilitator for meetings. Coordinate evaluation committee review and discussion of individual scores. Committee evaluations can be completed individually or as a group score. If completed individually, discussions are to be conducted with evaluators to resolve wide scoring variances (example: evaluator A gives a score of 5 and evaluator B gives a score of 2 to the same offeror on the same criteria). After discussion, evaluators may choose to appropriately revise the scores.
- 8. Clarifications on Proposal Responses. If you require clarifications on a proposal, work with the State Purchasing Agent on appropriate procedures and instructions regarding types of clarifications allowed.
- E. **Schedule oral presentations.** To properly evaluate proposals, oral presentations may be scheduled to answer questions by evaluation committee members. After consultation with the State Purchasing agent, all firms that are acceptable or potentially acceptable are invited to participate in oral presentations. If you want to limit the number of firms invited to the oral presentation, you must specifically identify this restriction in the RFP. The offeror's original proposal cannot be changed in any aspect at the oral presentation. The oral presentation is only to allow offerors to clarify portions of their proposal. During oral presentations, if it becomes evident that offerors may need to amend their proposal, a Best and Final process may be initiated.
- F. **Best and Final Offers (BAFO).** The Best and Final Offer process, **if needed**, is to encourage potential contractors to offer their best proposal by revising or enhancing their original proposal. The committee chairperson works closely with the State Purchasing agent who conducts this process. More than one BAFO may be required.
- G. Work with the state purchasing agent to evaluate cost, ensuring that an appropriate comparison is made. Cost/pricing details will not be sent to the agency for review until after the technical scoring has been completed and submitted to State Purchasing Agent for final review. The evaluation committee is generally not involved in the cost evaluation, since costs are scored objectively rather than subjectively. The typical formula used by State Purchasing Agent to calculate cost is as follows: Cost Points Possible X (2- (Proposal Price / Lowest Proposed Price))

Other formulas may be used if approved by the State Purchasing Agent. The formula must be identified in RFP document.

- H. Create a compilation of evaluator's final average score for each criterion.
- I. Compile all evaluation-related documentation.
- J. Prepare and send to State Purchasing a written award recommendation and justification statement. This document must include the strengths and weaknesses of all firms submitting proposals, and a summary of the evaluation process. Send that completed statement to the Division of Purchasing with:
  - 1. Compilation of evaluators average final scores
  - 2. Price for which award is recommended, if applicable
  - 3. Any other compiled evaluation-related documentation

Note: If the highest scoring offeror has a higher total price than a lower priced offeror, you may have to complete a cost benefit analysis in accordance with UCA 63G-6A-708. This analysis is required to quantify the value vs. cost. The analysis is to include a cost breakdown of the additional services/product the State can expect to receive for the additional money paid to the higher priced offeror.

- K. De-briefings with unsuccessful offerors. State Purchasing does not conduct face to face or teleconference debriefings. All debriefings are to be conducted in writing. Vendors must submit a debriefing request in writing to the State Purchasing Agent within seven (7) calendar days of the award notification or rejection notification made through written correspondence or posted on BidSync. The debriefing response will be limited to critiquing the strengths/weaknesses of an offeror's proposal based on the evaluation criteria. The debriefing is intended as a courtesy to offerors, providing feedback to be used for future opportunities. Comparisons between proposals or evaluations of other proposals will not be allowed.
- L. Participate in contract negotiations and contract development. If the procurement results in an agency contract, your agency will be responsible to negotiate exceptions to the terms and conditions. State Purchasing will provide assistance. Approval of your agency assistant attorney general will be required. If the procurement results in a State Cooperative Contract as a result of your agency requesting the product/service, and writing the specifications, your agency will be required to assist in the negotiations of some of the terms and conditions working closely with State Purchasing.

#### **Committee Member Responsibilities and Duties**

- A. Participate with the evaluation committee chairperson in developing the RFP, evaluation criteria and evaluation form.
- B. Attend the pre-proposal conference if one is scheduled.
- C. Attend the initial meeting to receive proposals and discuss the evaluation process.
- D. Read and sign an Evaluator Confidentiality and Conflict of Interest Certification@.
- E. Read each proposal, evaluate against the technical criteria and complete an evaluation form.
- F. Attend all oral presentations.

#### **Guidelines for Scoring Proposals**

Each technical proposal will be evaluated against a set of pre-determined criteria to assess the degree to which it meets that criterion. Compliance with requirements will be assessed as a point score on a scale from 0 to 5 as shown below:

- 0 = Failure, no response
- 1 = Poor, inadequate, fails to meet requirement
- 2 = Fair, only partially responsive
- 3 = Average, meets minimum requirement
- 4 = Above average, exceeds minimum requirement
- 5 = Superior

Reference checks - certain requirements, such as those that pertain to previous experience in required areas of expertise, may be evaluated further though reference checks. Designated evaluators may conduct reference checks. The results will be provided to all evaluators. Once reference checks are completed, evaluators will review their initial scoring of offeror responses in the context of reference responses.

The evaluation committee will meet to review the scores and to determine whether there are significant differences among evaluators. The purpose of this is to ensure that scoring differences are not the result of misunderstandings or an inability to locate appropriate material in the technical proposal. If either of these is the cause of divergent scoring, correction of scores should be made.

#### **Preparing a Scope of Work**

The purpose of the scope of work is to define correctly, clearly, concisely and completely all the obligations of the parties with respect to the effort to be performed. This section of the RFP is very important. If appropriately done it will produce responsive proposals and ease the task of managing the project/contract.

The scope of work needs to include an accurate and detailed description of the essential and technical requirements that the offeror must meet.

Vague references such as "prepared to our satisfaction" or "in a timely manner" are not acceptable. The scope of work needs to be written with language that is free from ambiguity and redundancy.

The scope of work is: (1) what the offeror is expected to be able to do, (2) what the agency agrees to do, (3) instructions to the offeror (4) the specifications that will form the basis for the contract.

The scope of work might include details such as:

- Services or work to be performed
- Timeline for completion of work
- How and where work is to be performed
- Procedures to be followed
- Safety and liability issues
- Any specific requirements
- Any limitations
- Etc.

## Request for Proposal (RFP) Template Instructions

This Request for Proposal (RFP) Template is to provide you with the framework and guidance to develop a good RFP.

The RFP is the official statement to suppliers about the service/product required. More importantly, it is the foundation upon which the agency and supplier relationship is established. Therefore, the RFP should be carefully crafted in order to get the best quality service/product.

The following template provides some suggestions for the content of the RFP. It contains all of the required elements of an RFP to meet the Procurement Code and Rules. It is designed to allow you to fill in the variable information specific to your requirements.

It is important that you recognize and identify all instructions and information being entered into the RFP. Care should be taken to ensure that each item of information or instruction is inserted under the appropriate heading. As an example, any instructions regarding the submission of proposals should go under the "Proposal Submission section and not in the scope of work or any other section. Any information that is part of the scope of work (contractor's required performance) should appear under the scope of work and not under another section.

The template includes the following:

Blue highlights: These are instructions to the writer. They provide direction as you create the RFP.

Yellow highlights: These are items to complete. They require data specific to your RFP requirements.

At the end of the template you will find examples of RFP Evaluation Forms and Cost Sheets. These are examples only. While it is necessary that your RFP contain these items, you may use one of our examples and customize it to your specific needs or create your own.

When the RFP is complete, please delete the yellow and blue highlighted areas and the examples at the back of the template. Then send your RFP to the appropriate state purchasing agent for review.

Items to Complete: Are highlighted in yellow and in parenthesis

## REQUEST FOR PROPOSAL (TITLE OF REQUEST)

Solicitation # (to be inserted by the Division of Purchasing)

#### PURPOSE OF REQUEST FOR PROPOSAL (RFP)

The purpose of this request for proposal is to enter into a contract with a qualified firm to (provide service or product). It is anticipated that this RFP may result in a contract award to (insert either "a single contractor" or "multiple contractors".)

This RFP is designed to provide interested offerors with sufficient basic information to submit proposals meeting minimum requirements, but is not intended to limit a proposal's content or exclude any relevant or essential data. Offerors are at liberty and are encouraged to expand upon the specifications to evidence service capability under any agreement.

#### BACKGROUND (If applicable)

#### **ISSUING OFFICE AND RFP REFERENCE NUMBER**

The State of Utah Division of Purchasing is the issuing office for this document and all subsequent addenda relating to it, on behalf of (requesting agency). The reference number for the transaction is Solicitation # (inserted by Division of Purchasing). This number must be referred to on all proposals, correspondence, and documentation relating to the RFP.

#### SUBMITTING YOUR PROPOSAL

NOTICE: By submitting a proposal in response to this RFP, offeror is acknowledging that the requirements, scope of work, and the evaluation process, outlined in the RFP are fair, equitable, not unduly restrictive, understood and agreed to. Any exceptions to the content of the RFP must be protested to the purchasing agent prior to the closing date and time for submission of the proposal.

Proposals must be received by the posted due date and time. Proposals received after the deadline will be late and ineligible for consideration.

The preferred method of submitting your proposal is electronically through BidSync

(formerly RFP Depot.) However, if you choose to submit hard copies, one original and (Number of copies) one for each member of the evaluation committee identical copies of your proposal must be received at the State of Utah Division of Purchasing, 3150 State Office Building, Capitol Hill, PO Box 141061, Salt Lake City, Utah 84114-1061.

When submitting a proposal electronically through BidSync, please allow sufficient time to complete the online forms and upload documents. The solicitation will end at the closing time listed in the RFP. If you are in the middle of uploading your proposal at the closing time, the system will stop the process and your proposal will not be received by the system.

Electronic proposals may require uploading of electronic attachments. BidSync's site will accept a wide variety of document types as attachments. However, the State of Utah is unable to view certain documents. Therefore, you **MAY NOT submit** documents that are **embedded (zip files), movies, wmp, and mp3 files**. All documents must be attached as separate files.

Cost will be evaluated independent from the technical proposal, and as such, is to be submitted separate from the technical proposal. Failure to submit cost separately may result in your proposal being determined non-responsive. Inclusion of any cost or pricing data within the technical proposal may also result in your proposal being determined non-responsive.

#### **LENGTH OF CONTRACT**

The Contract resulting from this RFP will be for a period of choose one of the following: (one year, two years, three years, four years, five years.)

Any requirement for a contract time frame that exceeds five years must be approved in advance by the Chief Procurement Officer.

The State of Utah reserves the right to review contract(s) on a regular basis regarding performance and cost analysis and may negotiate price and service elements during the term of the contract.

#### PRICE GUARANTEE PERIOD

All pricing must be guaranteed for (\_\_\_\_\_\_\_\_) i.e., 6 months, 1 year, entire term of the contract, etc. Following the guarantee period, any request for price adjustment must be for an equal guarantee period, and must be made at least 30 days prior to the effective date. Requests for price adjustment must include sufficient documentation supporting the request. Any adjustment or amendment to the contract will not be effective unless approved by the State Director of Purchasing. The State will be given the immediate benefit of any decrease in the market, or allowable discount.

#### STANDARD CONTRACT TERMS AND CONDITIONS

Any contract resulting from this RFP will include but not be limited to the State's Standard Terms and Conditions (see Attachment A). Exceptions and or additions to the State Standard Terms and Conditions are strongly discouraged.

Exceptions and additions to the Standard Terms and Conditions must be submitted with the proposal response. Exceptions, additions, service level agreements, etc. submitted after the date and time for receipt of proposals will not be considered. Website URLs, or information on website URLs must not be requested in the RFP document and must not be submitted with a proposal. URLs provided with a proposal may result in that proposal being rejected as non-responsive. URLs are also prohibited from any language included in the final contract document.

The State retains the right to refuse to negotiate on exceptions should the exceptions be excessive, not in the best interest of the State, negotiations could result in excessive costs to the state, or could adversely impact existing time constraints.

In a multiple award, the State reserves the right to negotiate exceptions to terms and conditions based on the offeror with the least to the most exceptions taken. Contracts may become effective as negotiations are completed.

If negotiations are required, contractor must provide all documents in WORD format for redline editing. Contractor must provide the name, contact information, and access to the person(s) that will be directly involved in legal negotiations.

#### **QUESTIONS**

All questions must be submitted through BIDSYNC. Answers will be given via the BIDSYNC site.

#### **DISCUSSIONS WITH OFFERORS (ORAL PRESENTATION)**

An oral presentation by an offeror to clarify a proposal may be required at the sole discretion of the State. However, the State may award a contract based on the initial proposals received without discussion with the Offeror. If oral presentations are required, they will be scheduled after the submission of proposals. Oral presentations will be made at the offerors expense.

Instruction to evaluators: To properly conduct the proposal evaluation, an offeror(s) proposal may need to be clarified. Oral presentations are then scheduled to answer questions by evaluation committee members. The offeror's original proposal cannot be changed in any aspect at the oral presentation. The oral presentation is only to allow offerors to clarify portions of their proposal.

#### PROTECTED INFORMATION

The Government Records Access and Management Act (GRAMA), Utah Code Ann., Subsection 63G-2-305, provides in part that:

the following records are protected if properly classified by a government entity:

- (1) trade secrets as defined in Section <u>13-24-2</u> if the person submitting the trade secret has provided the governmental entity with the information specified in Section 63G-2-309 (Business Confidentiality Claims);
- (2) commercial information or non-individual financial information obtained from a person if:
  - (a) disclosure of the information could reasonably be expected to result in unfair competitive injury to the person submitting the information or would impair the ability of the governmental entity to obtain necessary information in the future;
  - (b) the person submitting the information has a greater interest in prohibiting access than the public in obtaining access; and
  - (c) the person submitting the information has provided the governmental entity with the information specified in Section <u>63G-2-309</u>;

\* \* \* \* \*

(6) records the disclosure of which would impair governmental procurement proceedings or give an unfair advantage to any person proposing to enter into a contract or agreement with a governmental entity, except that this Subsection (6) does not restrict the right of a person to see bids submitted to or by a governmental entity after bidding has closed; ....

GRAMA provides that trade secrets, commercial information or non-individual financial information may be protected by submitting a Claim of Business Confidentiality.

To protect information under a Claim of Business Confidentiality, the offeror must:

- 1. Provide a written Claim of Business Confidentiality at the time the information (proposal) is provided to the state, and
- 2. Include a concise statement of reasons supporting the claim of business confidentiality (Subsection 63G-2-309(1)).
- 3. Submit an electronic "redacted" (excluding protected information) copy of your proposal response. Copy must clearly be marked "Redacted Version."

A Claim of Business Confidentiality may be appropriate for information such as client lists and non-public financial statements. **Pricing and service elements may not be protected.** The claim of business confidentiality must be submitted with your proposal on the form which may be accessed at:

http://www.purchasing.utah.gov/contract/documents/confidentialityclaimform.doc

An entire proposal cannot be identified as "PROTECTED", "CONFIDENTIAL" or "PROPRIETARY" and may be considered non-responsive if marked as such.

To ensure the information is protected, you must include all protected information in Section 4 of the proposal response. Any protected information incorporated in other sections of the proposal response may result in release of data at no fault of the State of Utah.

All materials submitted become the property of the state of Utah. Materials may be evaluated by anyone designated by the state as part of the proposal evaluation committee. Materials submitted may be returned only at the State's option.

#### **DETAILED SCOPE OF WORK**

(Insert the detailed scope of work) This is a detailed description of the work to be performed by the contractor. It should be organized to reflect the order in which the work will be performed. The work sequence should identify the major task headings and subtasks for performing that work. The scope of work section describes each task as carefully and with as much detail as possible. Agency personnel should make a thorough analysis of existing problems, goals, and some alternative methods of achieving the goals. This section is an important part of the RFP. If appropriately done it will produce responsive proposals and ease the task of managing the project/contract.

#### PROPOSAL REQUIREMENTS AND COMPANY QUALIFICATIONS

(Insert the detailed proposal requirements and company qualifications)

(Include any mandatory or minimum requirements that the offeror must include or demonstrate in their proposal such as: minimum qualifications, minimum experience requirements, financial statements, certifications or licenses, references, resumes, insurance, bonds, etc.) Caution; if you list any mandatory or minimum requirements, be aware that the evaluation committee must reject any proposals not meeting those requirements. To ensure that the evaluation committee gets the important-required information from the vendor without having to peruse a lot of insignificant material, it is highly recommend that proposal page limits be considered. The State Procurement Agent can assist you with this issue.

#### PROPOSAL RESPONSE FORMAT

All proposals must include:

- 1. **RFP Form**. The State's Request for Proposal form completed and signed.
- Executive Summary. The one or two page executive summary is to briefly
  describe the offeror's proposal. This summary should highlight the major
  features of the proposal. It must indicate any requirements that cannot be met by
  the offeror. The reader should be able to determine the essence of the proposal
  by reading the executive summary.

- 3. **Detailed Response.** This section should constitute the major portion of the proposal and must contain at least the following information:
  - A. A complete narrative of the offeror's assessment of the work to be performed, the offerors ability and approach, and the resources necessary to fulfill the requirements. This should demonstrate the offeror's understanding of the desired overall performance expectations. Clearly indicate any options or alternatives proposed.
  - B. A specific point-by-point response, in the order listed, to each requirement in the RFP.
- 4. **Protected Information.** All protected information must be included in this section of proposal response. Do not incorporate protected information throughout the proposal. Rather, provide a reference in the proposal response directing reader to the specific area of this Protected Information section.
- 5. **Cost Proposal.** Cost will be evaluated independently from the technical proposal. Please enumerate all costs on the attached Cost Proposal Form. *Provide a template for the offeror to submit proposed costs that will enable evaluators to make like comparisons. See attached examples.*

Cost is to be submitted as a separate document. Inclusion of any cost or pricing data within the technical proposal may result in your proposal being judged as non-responsive.

#### PROPOSAL EVALUATION CRITERIA

A committee will evaluate proposals against the following weighted criteria. Each area of the evaluation criteria must be addressed in detail in proposal. (The weighting of the criteria must reflect the priority of importance of the information asked for in the RFP. Carefully review the evaluation criteria and the weighting of criteria with the evaluation committee prior to submitting the RFP to State Purchasing.)

The following list of criteria is an example only. Please adjust the criteria to reflect the requirements listed in your RFP.

<u>WEIGHT</u>	EVALUATION CRITERIA
20 %	Demonstrated ability to meet the scope of work
15 %	Demonstrated technical capability (proven track record), etc.
15 %	Qualification and expertise of staff proposed for this project.
10 %	Performance references for similar projects.
40 %	Cost (Generally cost is weighted between 30 and 50 percent. A weight

#### less than 30% requires approval by the State Director of Purchasing)

All proposals in response to this RFP will be evaluated in a manner consistent with the Utah Procurement Code, rules, policies and the evaluation criteria established in the RFP.

#### **AWARD OF CONTRACT**

Award shall be made to the offeror whose proposal is the most advantageous to the State taking into consideration price and the other evaluation factors set forth in this request for proposals.

The State reserves the right to award the contract(s) to a technically qualified lower cost offeror(s) in the event the high scoring offer is determined to not be the best value offered to the State, based on a cost benefit analysis.

### Include the following attachments with your RFP:

- (1) Cost proposal sheet
- (2) RFP Evaluation Score Sheet
- (3) Other attachments as needed

#### The following forms are **examples ONLY**!

#### The following are:

- Sample cost proposal sheets, and
- Sample evaluation score sheets from proposals issued in the past

These samples may not meet the needs of your specific proposal but are included as examples as to how these forms are to be compiled.

Cost proposal sheets and evaluation score sheets must be customized to meet the specific requirements of your RFP.

You may select and modify one of the cost proposal sheets and one of the evaluation forms to meet the requirements of your RFP. If necessary the State Purchasing Agent can assist you or advise you on this issue.

Also included is a Conflict of Interest – Confidentiality Statement. This form is to be signed by each evaluator prior to Purchasing sending the proposals to agency for evaluation.

#### Sample Cost Proposal (1)

#### **COST PROPOSAL**

#### Cost is to be submitted based on the following:

Hourly Rate:	\$ per/hr.
Number of Hours	
Total	\$

(Any deviation from this format may result in disqualification of proposal)

#### **Sample Cost Proposal (2)**

#### **COST PROPOSAL**

Bidder	Name:		
1.	Provide a price for an enterprise software license as described in Section for the products identified in your technical offer. This price must also include the first year of maintenance and support fees.		
Enterpr	ise Licensing Fee with first year of maintenance included:	\$	
<ol> <li>Provide pricing for maintenance and support fees for the second through fifth year of ownership.</li> </ol>			
	Maintenance and Support Fees B Year 2	\$	
	Maintenance and Support Fees B Year 3	\$	
	Maintenance and Support Fees B Year 4	\$	
	Maintenance and Support Fees B Year 5	\$	
3.	List the name, job title and hourly rate for any proposed co	onsultants:	
Name:	Title: \$ Title: \$ Title: \$	6/ hour 6/ hour	
4.	Provide a per person training cost for any training that is responsible for the installation and operation of the product the training will be held at one of your training facilities. Specifically a specific person of the product that is not provided in the product of the product that is not provided in the product of t	ets included in this offer. Assume that pecify if the rate is hourly, daily, etc.	

(Any deviation from this format may result in disqualification of proposal)

#### **Sample RFP Evaluation Score Sheet (1)**

## TITLE OF PROJECT AND SOLICITATION # (to be inserted by the Division of Purchasing) RFP EVALUATION SCORESHEET

Score will be assigned as follows:
0 = Failure, no response
1 = Poor, inadequate, fails to meet requirement
2 = Fair, only partially responsive
3 = Average, meets minimum requirement
4 = Above average, exceeds minimum requirement
5 = Superior

		Score (0-5)	Weight	Points
Demonstrated Ability to meet scope of work     (20 points possible)				
(Criteria from RFP)	10 points possible		X 2	
	5 points possible		X 1	
	2.5 points possible		X .5	
	2.5 points possible		X .5	
Demonstrated Technical Capability     (15 points possible)				
(Criteria from RFP)	10 points possible		X 2	
	2.5 points possible		X .5	
	2.5 points possible		X .5	
Qualification and Expertise of Staff     (15 points possible)				
(Criteria from RFP)	5 points possible		X 1	
	5 points possible		X 1	
	5 points possible		X 1	
4. References (10 points possible)	10 points possible		X 2	
5. Cost (40 points possible)	40 points possible			* Inserted by Purchasing
TOTAL EVALUATION POINTS	(100 points possible)		Total	

<sup>\*</sup> Purchasing will use the following cost formula: The points assigned to each offerors cost proposal will be based on the lowest proposal price. The offeror with the lowest Proposed Price will receive 100% of the price points. All other offerors will receive a portion of the total cost points based on what percentage higher their Proposed Price is than the Lowest Proposed Price. An offeror whose Proposed Price is more than double (200%) the Lowest Proposed Price will receive no points. The formula to compute the points is: Cost Points x (2- Proposed Price/Lowest Proposed Price).

#### Sample RFP Evaluation Score Sheet (2)

## TITLE OF PROJECT AND SOLICITATION # (to be inserted by the Division of Purchasing) RFP EVALUATION SCORESHEET

	Score will be assigned as follows:
Firm Name:	0 = Failure, no response
	1 = Poor, inadequate, fails to meet requirement
Evaluator:	2 = Fair, only partially responsive
	3 = Average, meets minimum requirement
Deter	4 = Above average, exceeds minimum requirement
Date:	5 = Superior

		Score (0-5)	Weight	Points
1. Scope of Services (40 points possible)				
Creative Approach	10 points possible		X 2	
Sample Creative Concept	15 points possible		X 3	
Examples of Past work	5 points possible		X 1	
Understanding of agency mission	5 points possible		X 1	
Realistic allocation of hours for each element	5 points possible		X 1	
2. Specific Staff Experience (25 points possible)				
Expertise of staff involved in project	10 points possible		X 2	
Direct experience in specific project	10 points possible		X 2	
Demonstrated ability to reach target audience	5 points possible		X 1	
3. Timeframe (5 points possible)				
Demonstrated ability to complete project within required time	5 points possible		X 1	
4. Cost (30 points possible)	30 points possible			* Inserted by Purchasing
TOTAL EVALUATION POINTS	100 points possible		Total	

<sup>\*</sup> Purchasing will use the following cost formula: The points assigned to each offerors cost proposal will be based on the lowest proposal price. The offeror with the lowest Proposed Price will receive 100% of the price points. All other offerors will receive a portion of the total cost points based on what percentage higher their Proposed Price is than the Lowest Proposed Price. An offeror whose Proposed Price is more than double (200%) the Lowest Proposed Price will receive no points. The formula to compute the points is: Cost Points x (2- Proposed Price/Lowest Proposed Price).

#### **Conflict of Interest – Confidentiality Statement**

Solicitation Number:

Project Title:	
	firm that as a member of the selection
committee for the above-mentioned project, I will dischar	ge my responsibility without bias towards any
party. I hereby affirm that, to the best of my knowledge, no confivil be entrusted in my participation as a selection commit I hereby affirm that, to the best of my knowledge, I do not enhanced as a result of my participation as a selection as a selection of entity or firm that may benefit from my participation as a selection as a selection of entity or firm that may benefit from my participation as a selection of entity or firm that may benefit from my participation as a selection of entity or firm that may benefit from my participation as means ownership by myself or any spouse or minor child stock of a corporation, interest, agency or employee relationship.  I hereby affirm that, to the best of my knowledge, I have repart of any firm or entity as a result of my participation as means a father, mother, husband, wife, son, daughter, si mother-in-law, father-in-law, brother-in-law, sister-in-law, member of my household or anyone anticipated to be any I hereby affirm that there will be no unlawful discrimination committee member.  I hereby affirm that neither I nor any of my close relatives that I have not been contacted by any firm or any person	ittee member. It have any private interest that will be committee member. I have no interest in any selection committee member. "Interest" of any of the following: outstanding capital tionship with any corporation or other business no relative that will be appointed or selected as a selection committee member. "Relative" ster, brother, uncle, aunt, nephew, niece, son-in-law, daughter-in-law, first cousin, y of the above stated. In involved in my participation as a selection of have a financial interest in the project and
in an attempt to influence my vote.	
I understand that all information contained in the proposal process is protected and as such cannot be released or condividuals not involved in the proposal evaluation process information provided in the submittals or interviews with a members and State Purchasing prior to the completion of disseminate the deliberations of the selection committee, identified as protected.	discussed in any manner with other offerors or ss. I agree that I will not discuss or share any anyone other than the selection committee f the selection process and I will not discuss or
Signature:	Date:
Print Name:	Agency:
(If an evaluator has any relationship or bias toward any create the perception of bias, the prospective committee	•

disclosure to the purchasing agent, and a determination will be made by the Division of Purchasing of

the appropriateness of the prospective committee member sitting on the evaluation committee).

Proposals to be evaluated:

Agency: