

**Form 12**  
**RFQ Evaluation Package**  
**(Project Administrator)**  
**Criteria for Procurement**

**A. Specialized Experience And Technical Competence (40 Points Possible\*)**

1.	Experience with Small Purchase, Competitive Negotiation and Competitive Bidding Procurement Procedures	5 Points Maximum
2.	Experience Conducting Environmental Reviews	5 Points Maximum
3.	Experience with Fair Housing/Equal Opportunity Requirements	5 Points Maximum
4.	Experience with Financial Management	5 Points Maximum
5.	Experience with Acquisition	5 Points Maximum
6.	Experience with Contracts Management	5 Points Maximum
7.	Experience with Labor Compliance Requirements	5 Points Maximum
8.	Experience with Audits and Grant Closeout	5 Points Maximum
<b>TOTAL POINTS SCORED SECTION A</b>		40 TOTAL Points Maximum

**B. Performance (15 Points Possible\*)**

1.	Ability to Meet Schedules and Deadlines	5 Points Maximum
2.	Control of Costs	5 Points Maximum
3.	Quality of Work	5 Points Maximum
<b>TOTAL POINTS SCORED SECTION B</b>		15 TOTAL Points Maximum

**C. Capacity and Capability of Firm to Perform Work (15 Points Possible\*)**

1.	Staff to be Assigned	5 Points Maximum
2.	Staff Experience	5 Points Maximum
3.	Staff Time Available	5 Points Maximum
<b>TOTAL POINTS SCORED SECTION C</b>		15 TOTAL Points Maximum

**D. Proximity to and Familiarity with Project Area (10 Points Possible\*)**

1.	Convenient proximity to project to facilitate sufficient contact.	5 Points Maximum
2.	Familiarity with confines of project area.	5 Points Maximum
<b>TOTAL POINTS SCORED SECTION D</b>		10 TOTAL Points Maximum

<b>TOTAL POINTS SCORED</b>	<b>SECTIONS A THROUGH D</b>	<b>80 POINTS</b>
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\* *Numeric amounts are suggested guidance.*

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**RFQ Evaluation Package**  
**(Project Administrator)**  
**Rating Guidelines**

For a Project Administrator, Architect, Engineer, Surveyor or Lawyer, the following RFQ Rating Guidelines are to be used in evaluating all RFQs received:

**Score**

- 5 Documentation **clearly indicates** that the offeror possesses the knowledge and experience necessary to perform the job.
- 4 Documentation clearly indicates that the offeror **does possess** the knowledge and experience necessary to perform the job, but there is also **evidence of factors that limit the offeror.**
- 3 Documentation is **unclear; it neither does nor does not** indicate that the offeror has the knowledge and experience necessary to perform the job.
- 2 Documentation is **considerable** that the offeror **does not** possess the knowledge and skills necessary to perform the job.
- 1 Documentation is **clear and convincing** that the offeror **does not** possess the necessary knowledge and experience to perform the job.

**Specialized Experience and Technical Competence**

- The selection committee must evaluate each offeror's response to each area of the criterion "specialized experience and technical competence."
- Next, the selection committee must rate each area of "specialized experience and technical competence" on a scale from 1 to 5 using the rating guideline scale above.
- The rating achieved for each area of "specialized experience and technical competence" must then be placed on each offeror's rating worksheet.
- The selection committee must now document on each scoring sheet why each particular score was given, i.e., explain why one offeror was judged to possess the knowledge and experience necessary to perform the job or explain what evidence exists to justify a judgment that there are factors limiting the offeror's ability to provide the services desired, etc.
- Lastly, the individual areas of "specialized experience and technical competence" must be summed to produce a subtotal.

**Performance**

- The three areas of "performance" will be evaluated in terms of the results of reference checks.
- The selection committee should contact references and check work experience claimed by each offeror in response to the "performance" criterion.
- Next, the selection committee must evaluate the results of these contacts and rate each offeror using the rating scale on the preceding page.
- The rating achieved for each area of "performance" must then be placed on the rating worksheet of each offeror.

- The selection committee must now document on each scoring sheet why each particular score was given, i.e., explain why one offeror was judged to possess the knowledge and experience necessary to perform the job or explain what evidence exists to justify a judgment that there are factors limiting the offeror's ability to provide the services desired, etc.
- Finally, the individual areas of “performance” scores must be summed to obtain the “performance” subtotal.

### **Capacity and Capability of Firm to Perform Work**

- The selection committee must evaluate each offeror's response to each area of the criterion "capacity and capability of firm to perform work."
- The selection committee must rate each area of "capacity and capability of firm to perform work" on a scale from 1 to 5 using the rating guidelines scale on the preceding page.
- Next, the rating achieved for each area of "capacity and capability of firm to perform work” must be placed on each offeror's rating worksheet.
- The selection committee must now document on each scoring sheet why each particular score was given, i.e., explain why one offeror was judged to possess the knowledge and experience necessary to perform the job or explain what evidence exists to justify a judgment that there are factors limiting the offeror's ability to provide the services desired, etc.
- Lastly, the individual areas of "capacity and capability of firm to perform work" must be summed to obtain the "capacity and capability to perform work" subtotal.

### **Proximity to and Familiarity with Project Area**

- The selection committee must evaluate each offeror's response to each area of the criterion "proximity to and familiarity with the project area."
- The selection committee must rate each area of "proximity to and familiarity with the project area" on a scale from 1 to 5 using the rating guidelines scale on the preceding page.
- Next, the rating achieved for each area of "proximity to and familiarity with the project area” must be placed on each offeror's rating worksheet.
- The selection committee must now document on each scoring sheet why each particular score was given, i.e., explain why one offeror was judged to possess the knowledge and experience necessary to perform the job or explain what evidence exists to justify a judgment that there are factors that limit the offeror's ability to provide the services desired, etc.
- Lastly, the individual areas of "proximity to and familiarity with the project area" must be summed to obtain the "proximity to and familiarity with the project area” subtotal.

### **Total Score**

- Sum all category subtotal scores above.

## **RFQ Evaluation Package (Project Administrator) Rating Sheet**

Name of Offeror: \_\_\_\_\_  
 Possible Points: **80** Points Awarded: \_\_\_\_\_

**A. Specialized Experience and Technical Competence (40 Points Possible)**

	Points Possible	Points Awarded
1. Experience with Small Purchase, Competitive Negotiation and Competitive Bidding Procurement <i>Justify the score given:</i>	5	_____
2. Experience Conducting Environmental Reviews <i>Justify the score given:</i>	5	_____
3. Experience with Fair Housing/Equal Opportunity Requirements <i>Justify the score given:</i>	5	_____
4. Experience with Financial Management <i>Justify the score given:</i>	5	_____
5. Experience with Acquisition <i>Justify the score given:</i>	5	_____
	Points Possible	Points Awarded
6. Experience with Contracts Management	5	_____

*Justify the score given:*

7. Experience with Labor Compliance Requirements 5 \_\_\_\_\_  
*Justify the score given:*

8.. Experience with Audits and Grant Closeout 5 \_\_\_\_\_  
*Justify the score given:*

**SPECIALIZED EXPERIENCE AND TECHNICAL COMPETENCE SUBTOTAL \_\_\_\_\_**

**B. Performance**

**15 Points Possible)**

	Points Possible	Points Awarded
1. Ability to Meet Schedules and Deadlines <i>Justify the score given:</i>	5	_____

2. Control of Costs <i>Justify the score given:</i>	5	_____
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	Points Possible	Points Awarded
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3.	Quality of Work	5	
	<i>Justify the score given:</i>		

**PERFORMANCE SUBTOTAL** \_\_\_\_\_

**C. Capacity and Capability of Firm to Perform Work (15 Points Possible)**

		Points Possible	Points Awarded
1.	Staff to be Assigned	5	_____
	<i>Justify the score given:</i>		

2.	Staff Experience	5	_____
	<i>Justify the score given:</i>		

3.	Staff Time Available	5	_____
	<i>Justify the score given:</i>		

**CAPACITY AND CAPABILITY OF FIRM TO PERFORM WORK SUBTOTAL** \_\_\_\_\_

**D. Proximity to and Familiarity with Project Area (10 Points Possible)**

		Points Possible	Points Awarded
1..	Convenient Proximity to Project to Facilitate Sufficient Contact <i>Justify the score given:</i>	5	_____

2.	Familiarity with Confines of Project Area. <i>Justify the score given:</i>	5	_____
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**PROXIMITY TO AND FAMILIARITY WITH PROJECT AREA SUBTOTAL** \_\_\_\_\_

**TOTAL SCORE**

**(80 maximum points)**

Criteria	Points Possible	Points Achieved
1. Experience/Competence Subtotal	40	_____
2. Performance Subtotal	15	_____
3. Capacity/Capability Subtotal	15	_____
4. Proximity/Familiarity Subtotal	10	_____

<b>TOTAL SCORE</b>	<b>80</b>	_____
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**RFQ Evaluation Package  
(Project Administrator)  
Procurement Summary Sheet**

Offerors  (1)	Experience and competence  (2)	Performance  (3)	Capacity and capability to perform  (4)	Area proximity and familiarity  (5)	Total score  (6)	Non-responsive bid  (7)



**Form 12 - I**  
**RFQ Evaluation Package**  
**(Project Administrator)**  
**Instructions for Completing the Procurement Summary Sheet**

The Grantee shall list each offeror submitting a response to the Grantee's Request for Qualifications (RFQ) in column 1. **The offeror achieving the highest total score during the evaluation should be listed first**, the second highest score should be listed second, and so on.

The Grantee should list the four (4) general evaluation category scores of specialized experience and technical competence; performance; capacity and capability of firm to perform work; and proximity to and familiarity with project area achieved by each offeror during the RFQ evaluation in columns 2, 3, 4 and 5 respectively. The total score for each offeror should be listed in column 6.

Column 7 is used to indicate incomplete offers and/or non-responsive submittals. If an offeror's response is judged non-responsive, a check should be placed in this column and columns 2 through 6 should be left blank.