

REGIONAL DISTRICT OF OKANAGAN-SIMILKAMEEN

P O L I C Y

POLICY NO: P1610-00.09**Page 1 of 3****SUBJECT: REQUEST FOR PROPOSALS -
EVALUATION POLICY****Effective Date**
Augusts 19, 1999**Amendment**

March 22, 2001 (Maintain)

Board Resolution
B480/99

B202/01A

Administered By
Chief Administrative Officer
& Department Heads

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1. Requests for Proposals (RFP's) shall be reviewed by an Evaluation Team which shall consist of at least two staff members.
 2. The evaluation criteria shall be set out in advance and included within the RFP document. Depending on the nature and type of the project, the evaluation criteria and appropriate weighting may vary. Criteria and weighting shall be approved by the department head issuing the RFP and the Treasurer and/ or CAO. An example of a standard RFP evaluation form has been attached as Schedules "A.1 and A.2". The evaluation criteria and weighting of this example will vary to reflect the nature and type of the project.
 3. Upon completion of Step 2, the Evaluation Team shall determine, by consensus, or by averaging, the score for each proposal and shall forward these scores to the Board for its consideration to select the successful proponent.

Policy 1600-00.09 SCHEDULE A.1

REQUEST FOR PROPOSALS EVALUATION FORM

Proponent's Name: _____			
Project Title: _____			
Evaluation Date: _____			
Evaluator: _____			
Criteria			
Step 1:		YES	NO
Mandatory (Change list to suit the contract situation)	Proposal received prior to closing		
	Attended site meeting		
	Resumes of project team included		
	Equipment list		
	Sub-contractor list		
	Reference list		
	Sufficient number of proposal copies		
	Other		
		Max Points	Points
Step 2:	Qualifications of firm and project team members	10	
Proponent (30%)	Experience of firm and project team members	10	
	Past performance	5	
	Resources	5	
Proposal (50%)	Scope	15	
	Methodology	15	
	Scheduling	10	
	Project Team	5	
	Clarity of Proposal	5	
Price (20%)	Points for Price = (lowest cost proposal divided by proposal being evaluated) x (20% weight)	20	
	Proponent + Proposal + Price Scores	100	
Total Score (100%)			

Policy 1600-00.09 SCHEDULE A.2

Evaluation Team Members shall use the following list of questions to complete the RFP Evaluation Form:

Proponent Evaluation

- (i) Qualifications of Firm and Project Team Members:
Are the firm and project team members specialized and qualified in the nature of the project work?
- (ii) Experience of Firm and Project Team Members:
Has the firm completed similar projects during the last three years? Do the assigned project team members have experience with similar projects?
- (iii) Past Performance:
Is the firm's record of past performance sound? Do reference checks reveal weaknesses? Was abnormal level of monitoring required? Does the firm consistently complete assignments on time and within budget?
- (iv) Resources:
Does the firm have ample resources (e.g. staff, equipment, etc.) to apply to this project?

Proposal Evaluation

- (i) Scope:
Do the objectives, scope, work plan, and prediction of results comply with the terms of reference and project objectives?
- (ii) Methodology:
Is the methodology clear and in sufficient detail to cover all necessary aspects? Does the proposal reflect the required understanding of the project? Is each task clearly outlined and in logical sequence?
- (iii) Scheduling:
Does the proposal indicate that the achievement of objectives will be met according to an acceptable schedule? Are they within the timelines set by the terms of reference (if outlined in the terms of reference)? Are problems or delays accounted for? Is timing realistic for the project?
- (iv) Project Team:
Is the level of effort (total hours) adequate, low or high? Are the hours of professionals involved adequate, low or high? Is the proportion of professional vs. technical hours adequate or appropriate?

- (v) Clarity of Proposal:
Is the proposal clear, concise, and logical?

Price Evaluation

- (i) Total Price