

# VALUATION CRITERIA AND CONTRACTOR SELECTION

TOTAL NUMBER PEC AWARDED POINTS TOTAL: 500.

PEC MEMBER INITIALS: \_\_\_\_\_

PEC MEETING DATE: \_\_\_\_\_

## EXPERIENCE AND QUALIFICATIONS 150 POINTS

Proposals will be evaluated against the questions set out below:

- 1) Do the individuals assigned to the project have experience on similar projects? This shall include investing experience discussed in proposal.

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- 2) Is the applicable education and experience of the personnel designated to work on the project sufficient and do resumes demonstrate backgrounds that would be desirable for individuals engaged in the work the RFP requires?

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- 3) Does the firm have depth of qualified personnel assigned to the contract?

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- 4) Are references supplied, and do the references provide adequate assurance of work quality?

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- 5) Have the individuals assigned to the Bond Bank demonstrated an ability to provide innovative solutions to their investment advisory need?

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SECTION AWARDED POINTS: \_\_\_\_\_ /150

## **UNDERSTANDING OF THE PROJECT 50 POINTS**

**Proposals will be evaluated against the questions set out below:**

- 1) Has the offeror demonstrated a thorough understanding of the purpose and scope of the project?

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- 2) How well has the offeror identified pertinent issues and potential problems related to the project?

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- 3) Has the offeror demonstrated an understanding of the deliverables the Bond Bank's expects it to provide?

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SECTION AWARDED POINTS: \_\_\_\_\_/50

## **SEC. 1.01 METHODOLOGY USED FOR THE PROJECT 200 POINTS**

**Proposals will be evaluated against the questions set out below:**

- 1) How comprehensive is the methodology and does it depict a logical approach to fulfilling the requirements of the RFP?

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- 2) How well does the methodology match and achieve the objectives set out in the RFP?

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- 3) Does the methodology interface with the time schedule in the RFP?

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SECTION AWARDED POINTS: \_\_\_\_\_/200

## **SEC. 1.02 MANAGEMENT PLAN FOR THE PROJECT 100 POINTS**

**Proposals will be evaluated against the questions set out below:**

- 1) Is the organization of the project team clear and logically lead to the deliverables required in the RFP?

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- 2) How well does the management plan illustrate the lines of authority and communication?

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- 3) Have any potential problems been identified?

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SECTION AWARDED POINTS: \_\_\_\_\_/100

OVERALL AWARDED POINTS: \_\_\_\_\_/500