

## PROPOSAL EVALUATION FORM

All proposals will be reviewed for responsiveness and then evaluated using the criteria set out herein.

Offeror Name:	
Evaluator Name:	
Date of Review:	
RFP Number:	<b>2025-0400-0395</b>

### EVALUATION CRITERIA AND SCORING

THE TOTAL NUMBER OF POINTS USED TO SCORE THIS PROPOSAL IS **100**

#### **5.01 Understanding of the Project—10 Percent**

**Maximum Point Value for this Section - 10 Points**

**100 Points x 10 Percent = 10 Points**

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

- 1) How well has the offeror demonstrated a thorough understanding of the Bond Bank programs and the financial advisor’s role to the Bond Bank?

NOTES: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

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

NOTES: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

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

NOTES: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

- 4) Has the offeror demonstrated an understanding of the Bond Bank's time schedule and can meet it?

NOTES: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

- 5) Are all potential conflicts disclosed and discussed?

NOTES: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**EVALUATOR'S POINT TOTAL FOR 5.01:** \_\_\_\_\_

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**5.02 Methodology Used for the Project—10 Percent**

**Maximum Point Value for this Section - 10 Points**

**100 Points x 10 Percent = 10 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 continued operation of the Bond Bank's existing programs?

NOTES: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

- 2) How realistically and well does the methodology initiate, maintain, and continually deliver on the assignments set out in the RFP?

NOTES: \_\_\_\_\_  
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\_\_\_\_\_  
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3) For the specific examples requested in 4.04 is the response complete and inclusive in describing the financial advisor’s role?

NOTES: \_\_\_\_\_  
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\_\_\_\_\_

4) How well does the methodology interface with the time schedule in the proposal?

NOTES: \_\_\_\_\_  
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**EVALUATOR'S POINT TOTAL FOR 5.02:** \_\_\_\_\_

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**5.03 Management Plan for the Project—10 Percent**

**Maximum Point Value for this Section - 10 Points**

**100 Points x 10 Percent = 10 Points**

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

1) How well does the management plan support all of the project requirements and logically lead to the deliverables required in the RFP?

NOTES: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

2) How well is accountability completely and clearly defined?

NOTES: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

3) Is the organization of the project team clear?

NOTES: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

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

NOTES: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

5) To what extent does the offeror already have the hardware, software, equipment, and licenses necessary to perform the contract?

NOTES: \_\_\_\_\_  
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\_\_\_\_\_  
\_\_\_\_\_

6) Does it appear that offeror can meet the schedule set out in the RFP?

NOTES: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

7) Has the contractor gone beyond the minimum tasks necessary to meet the objectives of the RFP?

NOTES: \_\_\_\_\_  
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\_\_\_\_\_  
\_\_\_\_\_

8) To what degree is the proposal practical and feasible?

NOTES: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

9) To what extent has the offeror identified potential problems?

NOTES: \_\_\_\_\_  
\_\_\_\_\_  
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**EVALUATOR'S POINT TOTAL FOR 5.03:** \_\_\_\_\_

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**5.04 Experience and Qualifications—20 Percent**

**Maximum Point Value for this Section - 20 Points**

**100 Points x 20 Percent = 20 Points**

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

**1) Questions regarding the personnel.**

a) Do the individuals assigned to the project have experience on pooled conduit financing of municipal debt?

NOTES: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

b) Are resumes complete and do they demonstrate backgrounds that would be desirable for individuals engaged in the work the project requires?

NOTES: \_\_\_\_\_  
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\_\_\_\_\_  
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c) How extensive is the applicable education and experience of the personnel designated to work on the project?

NOTES: \_\_\_\_\_  
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d) Has the primary designee participated in financings as described in 4.06?

NOTES: \_\_\_\_\_  
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**2) Questions regarding the firm.**

a) How well has the firm demonstrated experience in completing similar projects on time and within budget?

NOTES: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

b) How successful is the general history of the firm regarding timely and successful completion of projects?

NOTES: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

c) Has the firm provided letters of reference from previous clients?

NOTES: \_\_\_\_\_  
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**EVALUATOR'S POINT TOTAL FOR 5.04:** \_\_\_\_\_

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**EVALUATOR'S COMBINED POINT TOTAL FOR ALL EVALUATED SECTIONS:** \_\_\_\_\_