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2024

PEAK
PROCUREMENT EXCELLENCE AND KNOWLEDGE

The logo for "PEAK" features the word "PEAK" in a large, bold, blue font. The letter "E" is highlighted in orange. A thick orange arrow starts from the bottom left of the "E" and curves upwards and to the right, ending above the "K". Below the word "PEAK" is the tagline "PROCUREMENT EXCELLENCE AND KNOWLEDGE" in a smaller, blue, all-caps font.

Breakout Session
RFP EVALUATION



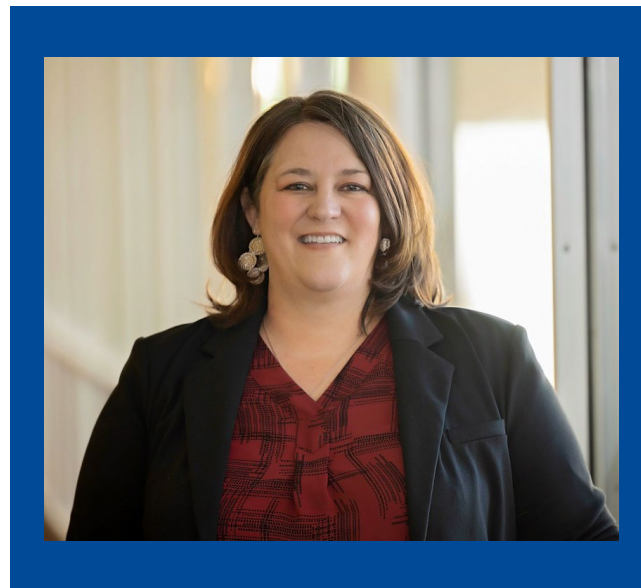
Breakout Session



RFP Evaluation

Meredith Swartz, Purchasing Director

Department of Administration



Session Topics

Responsiveness, Requirements and Evaluation Criteria

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graph TD; A[Responsiveness, Requirements and Evaluation Criteria] --> B[Writing Good Evaluation Criteria]; B --> C[Documenting Evaluation]; C --> D[Justification of Award];
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Writing Good Evaluation Criteria

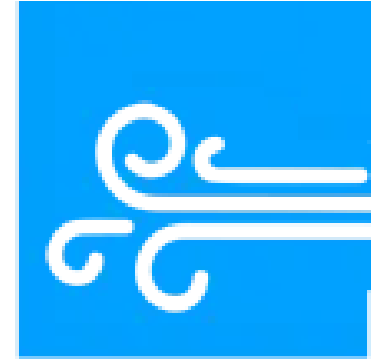
Documenting Evaluation

Justification of Award

Example RFP

- **Agency Specific Contract** where no minimums or maximums guaranteed
- **Term of 3 years**
- **Scope:**
 - Water damage
 - Wind damage
 - Fire damage
 - Hazardous waste site
 - Vandalism cleanup
 - Mold remediation
 - Equipment and Response
- **Evaluation:**
 - Vendor Experience (20 pts)
 - Staffing Qualifications(20 pts)
 - Technical Approach (20 pts)
 - Cost (40 pts)

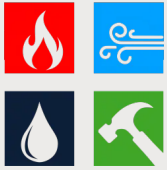
Emergency Restoration and Disaster Recovery Services



Responsiveness & Meeting Requirements

- **RESPONSIVE:** Vendor has submitted required information/Documentation with its proposal.
- **REQUIREMENTS:** Specifications that a Vendor must meet
- Both are “Yes/No” or “Pass/Fail”
- Breakout in Sourcing to help with Responsiveness
- **Evaluation Team** must verify if content supplied with requirement documentation is valid
- Responsiveness determined during initial review; meeting requirements could also be determined during evaluation.

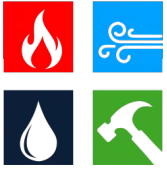




EXAMPLE RESPONSIVENESS

- Proposal Signed
- Vendor submitted Vendor Experience
- Vendor Submitted Staffing Plan
- Vendor submitted Technical Approach
- Vendor submitted Pricing Form
- Vendor submitted Required Certifications
- Subcontractor List





EXAMPLE REQUIREMENTS

- At a **minimum** Vendor must possess and provide copies with its proposal the following certifications:
 - ❖ Water Damage Restoration Technician (WRT)
 - ❖ Applied Structural Drying (ASD)
 - ❖ Fire and Smoke Restoration Technician (FSRT)
 - ❖ Mold Remediation Certification
- Vendor shall cite experience by providing five (5) similar restoration and disaster recovery projects performed by the Vendor within the last 5 years.
- The Vendor's Restoration Manager assigned to this contract must have a minimum of five (5) years of restoration project experience in providing restoration services management.



Evaluation Criteria

- Be Detailed on what the Evaluation team will be looking for to constitute strength vs weakness
- MUST NOT change evaluation criteria during the evaluation phase
- Evaluation Criteria should relate to a section within the solicitation document. Each section can only be evaluated once or under one criteria.

Vendor Experience: (Past relative experience)

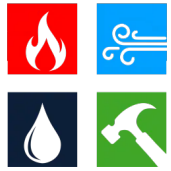
- In its Proposal, Vendor shall demonstrate experience with public and/or private sector clients with similar or greater size and complexity to the State of North Carolina.

Staff Qualifications: (Who will perform the work)

- Vendor shall provide information as to the qualifications and experience of all proposed staff to be assigned to this project, including resumes citing experience with similar projects and the responsibilities to be assigned to each person.

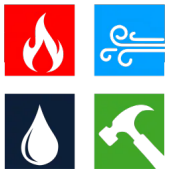
Technical Approach – (How the Vendor will meet State's business requirements.)

- Vendor's proposal shall include, in narrative, outline, and/or graph form the Vendor's approach to accomplishing the tasks outlined in the Scope of Work section of this RFP. A description of each task and deliverable and the schedule for accomplishing each shall be included.



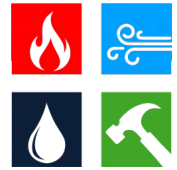
EXAMPLE VENDOR EXPERIENCE

- In its Proposal, Vendor shall demonstrate experience with public and/or private sector clients with similar or greater size and complexity to the State of North Carolina.
- Vendor shall cite experience by providing five (5) similar restoration and disaster recovery projects performed by the Vendor within the last 5 years. Vendor shall describe services rendered and provide references for each of these projects.



EXAMPLE STAFF QUALIFICATIONS

- Vendor shall provide information as to the qualifications and experience of all professional personnel to be assigned to this project, including resumes citing experience with similar projects and the responsibilities to be assigned to each person.
- The Vendor's Restoration Manager assigned to this contract must have a minimum of five (5) years of restoration project experience in providing restoration services management. Vendor shall provide description of Restoration Manager's experience and provide references for each of these projects.



EXAMPLE TECHNICAL APPROACH

Vendor's proposal shall include, in narrative, outline, and/or graph of the Vendor's approach to accomplishing the tasks outlined in the Scope of Work section of this RFP.

Vendor shall include **at a minimum** the following information:

- DISPATCH: Vendor's intake of initial request for service, dispatch operations, and communication lines between any subcontracted companies for any rental equipment or services performed under this contract. Vendor shall include how it meets the response requirements of the scope of work.
- SERVICE: Vendor is to describe its service objectives and resources including but not limited to: Vendor's web presence; operational hours where staff is available for contact via phone and email; phone and email communication capabilities with the State for 24/7 service.
- SUBCONTRACTORS: Vendor must provide list with its proposal of any subcontractors it proposes to use under this contract and for which services the Vendor plans to use that subcontractor and the qualifications and experience of any subcontractors it plans to use under this contract.
- EQUIPMENT: Vendor must provide information as to the capacity and quantity of all the equipment owned listed in Attachment A: Pricing. If rented, Vendor must provide information as to the subcontracted rental company's capacity and quantity owned and provide dispatch guaranteed times.

Documenting Evaluation

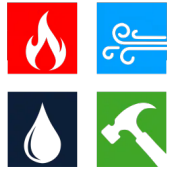
- Document strengths and weaknesses for each criteria (and sub criteria) taken directly from the RFP. Be detailed in why a strength or weakness.
- State should evaluate on how the Vendor's response measures to the proposed project and scope of work
 - Similar past experience
 - Staff have the qualifications needed
 - Approach that meets the desired project outcomes
- Individual Evaluation Team Member notes must be kept until after protest period
- Evaluate what is within the 4 corners of the proposal
 - Any outside research must be FULLY documented and warn can be problematic**





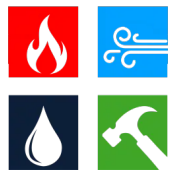
EXAMPLE EVALUATION MATRIX

EVALUATION CRITERIA	VENDOR X		VENDOR Z	
VENDOR EXPERIENCE	Strength	Weakness	Strength	Weakness
Experience with public and/or private sector clients similar the State of North Carolina.	Vendor has completed services for NC State, City of Raleigh same in size		Vendor has completed services for City of Greensboro, Novant Medical Facilities same in size	
Experience by providing five (5) similar restoration and disaster recovery projects	Projects included water damage, mold remediation, hurricane disaster, Hazardous waste cleanup with results and timelines of completion			Projects sited strictly janitorial services no experience in disaster recovery services.



EXAMPLE EVALUATION MATRIX

EVALUATION CRITERIA	VENDOR X		VENDOR Z	
STAFFING QUALIFICATIONS	Strength	Weakness	Strength	Weakness
Qualifications and experience of all professional personnel to be assigned to this project	Vendor holds all required certifications and Staff to be assigned has extensive training and certifications		Vendor holds all required certifications	
Restoration Manager experience	Manager meets the 5 years of experience and has worked as the lead on all referenced projects of same size and scope		Manager meets the 5 years of experience	Manager experience is not in the area of disaster recovery.



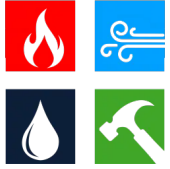
EXAMPLE EVALUATION MATRIX

EVALUATION CRITERIA	VENDOR X		VENDOR Z	
TECHNICAL APPROACH	Strength	Weakness	Strength	Weakness
Dispatch - intake of initial request for service, dispatch operations, how it meets the response requirements	Vendor provides local staff on call 24/7. Dispatches from Raleigh			Vendor does not have local office for dispatch. Did not provide information as to how it plans to meet response requirements
Service - Vendor's web presence; operational hours, communication capabilities for 24/7 service	Detailed ticketing system to generate quotes and invoices. Communications provided 24/7		Website to submit orders generate invoices.	1800 number with subcontracted call back service for 24/7. No on-call personnel
Subcontractors - qualifications and experience of any subcontractors		Vendor gave sub contact info but did not provide qualifications of sub for hazardous waste		Vendor subcontracts all of disaster recovery services. Only provides janitorial graffiti removal
Equipment - equipment owned or rented, if rented dispatch guaranteed times	Vendor owns all equipment			Vendor dependent on subcontractor for equipment and can not guarantee response

Analyzing Cost

- Remember Cost is **ALWAYS** a factor in evaluation
- Suggest a minimum of 30% factor when using weighted scoring
- Specify in Solicitation Document Evaluation Criteria how cost will be evaluated
- Consider Total Cost of Ownership
- Financial Statements must be reviewed and analyzed by qualified individual (CPA)





EXAMPLE COST ANALYSIS

Cost analysis will be determined using the Vendors proposed labor rates for each position listed using eight (8) hours of Standard Rate, eight (8) hours of Emergency Services Rates, eight (8) hours of Overtime Rate and one (1) day of rental for each equipment item. (See Attachment A: Pricing)

VENDOR X	VENDOR Z
\$36,542.00	\$34,264

WEIGHTED

Vendor Z – All 40 Points for lowest cost
 Vendor X - $\$34,264 / \$37,542 \times 40 = 36$ Points

BEST VALUE

Analyze each rate. It was found during analysis that some of Vendor Z's equipment rates are higher due to the Vendor subcontracting equipment. Vendor X has higher labor rates but offers better services.

Justification of Award

- Weighted: Point/Percentage values assigned for each criteria.
 - Avoid arbitrarily assigning points and make consistent. Include rubric.
 - All Vendors start with maximum points and points are removed for weaknesses.
- Best Value: Narrative within the Justification of Award memo as to why the Evaluation Team came to the conclusion that Vendor X is the best value for the State.
 - Reference how Vendor X's strengths as documented in the Evaluation Matrix pushed their proposal to the top in considering each of the evaluation criteria AND cost.



**Example of
Point Rubric**
Assign a point value
to each criteria and
assign points based
on strengths and
weaknesses noted.



Significant Strength/No Weakness – 20 Points



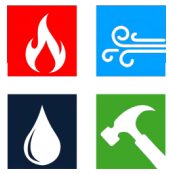
Strength/Weakness Identified – 15 points



Strength/Significant Weakness Identified – 10 points

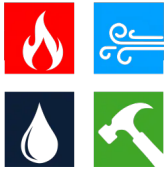


No Strength/Significant Weakness, Deficiency – 0 points



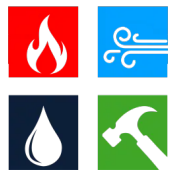
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VENDOR EXPERIENCE 20PTS	Strength	Weakness	Strength	Weakness
Experience with public and/or private sector clients similar the State of North Carolina.	Vendor has completed services for NC State, City of Raleigh same in size +10		Vendor has +10 completed services for City of Greensboro, Novant Medical Facilities same in size	
Experience by providing five (5) similar restoration and disaster recovery projects	Projects included water damage, mold +10 remediation, hurricane disaster, Hazardous waste cleanup with results and timelines of completion			Projects sited strictly janitorial services no experience in disaster recovery services. -10



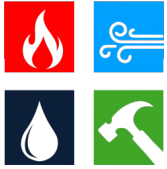
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Qualifications and experience of all professional personnel to be assigned to this project	Vendor holds all required certifications and Staff to be assigned has extensive training and certifications +10		Vendor holds all required certifications +10	
Restoration Manager experience	Manager meets the 5 years of experience and has worked as the lead on all referenced projects of same size and scope +10		Manager meets the 5 years of experience +5	Manager experience is not in the area of disaster recovery. -5



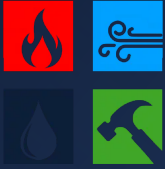
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Dispatch - intake of initial request for service, dispatch operations, how it meets the response requirements	Vendor provides local staff on call 24/7. Dispatches from Raleigh +5			Vendor does not have local office for dispatch. Did not provide information as to how it plans to meet response requirements -5
Service - Vendor's web presence; operational hours, communication capabilities for 24/7 service	Detailed ticketing system to generate quotes and invoices. Communications provided 24/7 +5		Website to submit orders generate invoices. +3	1800 number with subcontracted call back service for 24/7. No on-call personnel -2
Subcontractors - qualifications and experience of any subcontractors		Vendor gave sub contact info but did not provide qualifications of sub for hazardous waste -5		Vendor subcontracts all of disaster recovery services. Only provides janitorial graffiti removal -5
Equipment - equipment owned or rented, if rented dispatch guaranteed times	Vendor owns all equipment +5			Vendor dependent on subcontractor for equipment and can not guarantee response -5



EXAMPLE SCORE CARD

EVALUATION CRITERIA	VENDOR X	VENDOR Z
Vendor Experience (20 pts)	20	10
Staffing Qualifications (20 pts)	20	15
Technical Approach (20 pts)	15	3
Cost (40 pts)	36	40
TOTAL POINTS	91	68



EXAMPLE BEST VALUE AWARD JUSTIFICATION

Vendor X provides the State the best overall value for Emergency Restoration and Disaster Recovery Services. This Vendor has provided within its proposal, **experience** with clients of the same size to NC with multiple facilities. Past projects include proven results in the same areas of services required under this contract. The Vendor's **proposed staff** and restoration manager has the required certifications and additional training and experience that makes them experts in this field. The Vendor provides a **technical approach** that meets the scope of work including live 24/7 on call staff, detailed dispatch procedures to meet the response requirements, and the complete ownership of equipment to be on site as needed. While Vendor X hourly rates are higher than Vendor Z, this **cost** is directly correlated to the Vendor's experience in this field, personnel qualifications and expertise, and overall operations this Vendor will provide to the State under this contract.

Award Recommendation Memo Outline



Purpose: Why does the Division need these goods/services, any mandated statues associated, general requirements/scope, etc.



Bid Process: Bid posting/opening dates, site visit information, question and answer information, number of bids received, detail of any Vendors found non-responsive



Evaluation Team: names, division and titles of voting members and subject matter experts on the team



Evaluation Method and Process: method and criteria as listed in the RFP, outline of steps taken by the Evaluation Team, dates of evaluation team meetings, etc.



Vendor Evaluations: a brief description of the of the strengths and weaknesses of each Vendor's proposal (should have the detailed matrix), details of negotiations or BAFO's.



Cost analysis: steps and calculations completed for cost analysis



Recommendation for Award: Final justification for award, contract term, contract annual and cumulative (all renewals included) amounts,



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