## Proposal Evaluation Scoring

## Cover Sheet and Instructions

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|  | | | APPROVED DOCUMENT – This document is approved by the Office of the President and Office of the General Counsel for use by the Facility and is available on computer diskette. | | | | |
|  | | |  | | | | |
| **PURPOSE OF DOCUMENT:** | Provide a scoring matrix to Review Panel. | | | | | | |
| **CROSS-REFERENCE TO FACILITIES MANUAL:** | None | | | | | | |
| **CONTENTS:** | Proposal Evaluation Scoring | | | | | | |
| **FOR USE WITH:** | Design Build Agreement | | | | | | |
| **COMPLETED BY:** |  | Filling in | |  | Adding Text |  | No Data Required |
| **ITS USE IS:** |  | Required | |  | Optional | | |

**Completion Instructions:**

1. Notes, suggested text, instructions and other information is formatted using the following methods:

* Hidden text within brackets. {This is an example of the format.} Read the material within the brackets and take the appropriate action (usually inserting text or selecting from a choice of texts.) When printing this document, the default print property will not print the hidden text.
* Coded instruction within brackets. The instructions and shading will disappear when the required information is typed.
* Suggested text is shaded in gray without brackets (see Modifications and Additions below.)

**Modifications and Additions:**

1. Areas shaded in gray, without brackets, represent suggested text that may be modified by the Facility to meet the needs of the Project. This is an example of the format. Ensure that any modified or added text is consistent with the Contract Documents.
2. Areas not highlighted in gray, without brackets, shall not be altered without approval of the Office of the President.
3. Facility may modify this document. The criteria and point allocation in the document are examples, and should be modified for each project. There should be a rational relationship between the categories and their relative weight/importance.
4. Suggested categories and scoring should be considered an example only. The Facility must tailor its scoring to the specific project circumstances. Categories and scoring used must be consistent with other related documents.

**Comments:**

This form is not to be released outside the University.

**END OF COVERSHEET AND INSTRUCTIONS**

## DO NOT RELEASE OUTSIDE UNIVERSITY

## PROPOSAL EVALUATION SCORING

# PROJECT NAME:

PROJECT NUMBER:

PROPOSER NAME:

DATE:

SIGNATURE OF EVALUATORS:

1. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
2. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
3. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

{THE CRITERIA AND POINT ALLOCATION BELOW SHOULD BE MODIFIED AS APPROPRIATE FOR EACH PROJECT. THE NUMBERS USED ARE EXAMPLES BUT THERE MUST BE A RATIONAL RELATIONSHIP BETWEEN THE CATEGORIES AND THEIR RELATIVE WEIGHT. }

### Preliminary Design Submittal

TOTAL POINTS **80**

Evaluators will consider the following evaluation elements when reviewing the Preliminary Design Submittal in addition to determining whether the proposal complies with all requirements of the Request for Proposals:

CATEGORY POINT RANGE ASSIGNED POINTS

1. Architectural image and character 0-10 \_\_\_\_\_\_\_\_\_\_

2. Design conformance with Project requirements 0-10 \_\_\_\_\_\_\_\_\_\_

3. Innovative design 0-10 \_\_\_\_\_\_\_\_\_\_

4. Aesthetic use of materials 0-10 \_\_\_\_\_\_\_\_\_\_

5. Architectural vocabulary conformance

with campus architecture 0-5 \_\_\_\_\_\_\_\_\_\_

6. Building integration with existing elements 0-5 \_\_\_\_\_\_\_\_\_\_

7. Functional efficiency and flexibility 0-5 \_\_\_\_\_\_\_\_\_\_

8. Facility Standards Adherence 0-5 \_\_\_\_\_\_\_\_\_\_

9. Building access 0-5 \_\_\_\_\_\_\_\_\_\_

10. Energy conservation 0-5 \_\_\_\_\_\_\_\_\_\_

11. Operation and maintenance costs

and requirements 0-5 \_\_\_\_\_\_\_\_\_\_

12. Compliance with Project requirements 0-5 \_\_\_\_\_\_\_\_\_\_

13. Risk \* \_\_\_\_\_\_\_\_\_\_ (Deduction)

### Proposed Contract Schedule and Project Work Plan

TOTAL POINTS **140**

Evaluators will consider the following evaluation elements when reviewing the Proposed Contract Schedule and Project Work Plan in addition to determining whether the proposal complies with all requirements of the Request for Proposals:

Realism of proposed timeframe

Interrelationship of Phases

“Fast tracking”

Adequacy of time required for reviews

Relative detail of Proposal Schedule

1. Proposed Contract 0-20 \_\_\_\_\_\_\_\_\_\_

Schedule Phase 1

2. Proposed Contract Schedule 0-30 \_\_\_\_\_\_\_\_\_\_

Phase 2

3. Proposed Contract Schedule 0-60 \_\_\_\_\_\_\_\_\_\_

Phase 3

4. Project Work Plan 0-30 \_\_\_\_\_\_\_\_\_\_

5. Risk **\*** \_\_\_\_\_\_\_\_\_\_ (Deduction)

\*Risk will be evaluated for each category after the initial point evaluation is completed. The evaluator will review all aspects of the category to determine, based on the totality of information available for that category and the experience of the evaluator, the risk associated with the approach proposed. As an example, if the proposed schedule includes “fast tracking” there may be some risk but this must be balanced against whether the schedule realistically reflects any possible time issues with “fast tracking.” If the schedule is overly optimistic, the University has some risk exposure and this should be reflected in a deduction of points.

The number of points deducted for risk is within the purview of each evaluator and should reflect their individual judgment. The risk points for each category should not exceed per cent of the total points for that category.

Project Team Organization

TOTAL POINTS **80**

Evaluators will consider the following evaluation elements when reviewing the Project Team Organization in addition to determining whether the proposal complies with all requirements of the Request for Proposals:

Adequacy of identified personnel

Percentage of time allocated to Project

Management approach to the Project

1. Organizational Chart 0-10 \_\_\_\_\_\_\_\_\_\_

2. Qualifications of Key Personnel 0-40 \_\_\_\_\_\_\_\_\_\_

3. Management and Staffing Plan 0-30 \_\_\_\_\_\_\_\_\_\_

4. Risk \* \_\_\_\_\_\_\_\_\_\_ (Deduction)

TOTAL POINTS AVAILABLE **300 TOTAL EVALUATED PTS \_\_\_\_\_\_\_\_\_\_**

\*Risk will be evaluated for each category after the initial point evaluation is completed. The evaluator will review all aspects of the category to determine, based on the totality of information available for that category and the experience of the evaluator, the risk associated with the approach proposed. As an example, if the proposed schedule includes “fast tracking” there may be some risk but this must be balanced against whether the schedule realistically reflects any possible time issues with “fast tracking.” If the schedule is overly optimistic, the University has some risk exposure and this should be reflected in a deduction of points.

The number of points deducted for risk is within the purview of each evaluator and should reflect their individual judgment. The risk points for each category should not exceed per cent of the total points for that category.