



Public Service Commission

-M-E-M-O-R-A-N-D-U-M-

DATE: August 15, 1996
TO: Alan Brown, Alexander Fleischman, Sylvia Johe, Laura King, Dale Mailhot, Don McDonald, Alan Taylor, Rick Wright
FROM: Richard Tudor, Contract Manager *RNT*
RE: Proposal Evaluation Procedures *900598-TP*

Attached you will find instructions to be used to perform the evaluations of proposals submitted by bidders for the Florida Relay Service. Any need by an evaluator for procedural guidance in completing the evaluation forms should be communicated to me at (904) 413-6516.

cc: C. Miller
 T. Kramer
 Advisory Committee
 Current Bidders List

a:\instruct.lvk

- ACK _____
- AFA _____
- APP _____
- CAF _____
- CMC _____
- CTR _____
- EAG _____
- LEG _____
- LIN _____
- OPC _____
- RCH _____
- SEC 1
- WAS _____
- OTH _____

DOCUMENT NUMBER-DATE

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FPSC-RECORDS/REPORTING

PROCEDURES FOR EVALUATING TECHNICAL PROPOSALS

The following procedures are to be followed by evaluators in conducting their independent evaluation of all proposals to provide Florida Relay Service. Evaluations are to be performed independently by each evaluator. There should not be communication between individual evaluators nor between evaluators and other individuals concerning the proposals received. The timetable, on pages 3 and 4, must be strictly adhered to unless changed by the Contract Manager. If any evaluator determines the schedule cannot be met, the Contract Manager should be notified as soon as possible so that all evaluators may be advised of any change in the schedule.

Evaluators and Evaluation Forms

The following individuals are evaluators of the technical proposals. The five individuals identified with an asterisk are the primary evaluators while the other three individuals identified with a double asterisk are accountants who will be evaluating two items in the technical filing: i.e., Check List Items 51 and 53.

- * Mr. Alan Brown - Advisory Committee
- Mr. Alexander Fleischman - Advisory Committee
- ** Ms. Sylvia Johe - FPSC Staff
- * Ms. Laura King - FPSC Staff
- ** Mr. Dale Mailhot - FPSC Staff
- Mr. Alan Taylor - FPSC Staff
- * Mr. Richard Tudor - FPSC Staff
- ** Mr. Rick Wright - FPSC Staff

In addition to the above, reference checks will be made by Don McDonald of the Public Service Commission Staff using the attached form entitled "Reference Checks for Relay Center Bidders". Rather than having each of the five evaluators call the bidders' references, a single reference check will be made by Mr. McDonald using a standard set of questions. The results will be sent to each evaluator to be used in conjunction with the companies' proposal to evaluate Check List Item 52, Experience and Customer References. Individual evaluators should not contact the references directly, but use the reference check summary prepared by Mr. McDonald.

Attached are three sample evaluation forms entitled "Form A", "Form B", and "Form C". "Form A" is used by the accounting evaluators to evaluate the pass/fail financial information. "Form B" is used by the primary evaluation team to evaluate the pass/fail technical items. "Form C" is also used by the primary evaluation team to assign points to technical items. These forms are completed in different stages of the evaluation process.

Each of the three evaluation forms have the following similarities:

- (a) The cover page of each form contains a place for each evaluator to agree with the conflict of interest requirement contained in Section 427.704(3)(c), Florida Statutes.
- (b) Also, on each page of the evaluation form is a place for the evaluator to date and sign verifying that the score and notes on that page are his/hers.
- (c) On each page of the form, there is a place to score each of the bidders on the item referenced on that page. There is also a place for evaluators to use for notes to identify why a certain pass/fail grade or point value was assigned. Each evaluator should use this notes section to briefly state why a grade of fail or a grade either higher or lower than "good" was assigned.
- (d) Each page of the evaluation forms identifies the item to be evaluated and provides the Request For Proposal (RFP) and check list reference.
- (e) Each of the forms has the names of each of the bidders which have filed proposals.

Evaluation Process and Schedule

The pass/fail evaluated items in Forms A and B will be evaluated at the same time by the two sets of evaluators. The Form A evaluation team of accountants will be evaluating the two assigned items dealing with financial information and bid security. The primary technical evaluation team will, at the same time, be using Form B to evaluate all other pass/fail items. Only after the pass/fail items have been evaluated and a determination has been made that bidders have passed all pass/fail rated items (those passing all pass/fail items are initially determined by a majority decision of the evaluators) will the Contract manager then advise evaluators to proceed with scoring using Form C.

Once the evaluators have been advised as to which bidders should be further evaluated using Form C, evaluators should then begin the scoring process. (Note: this does not preclude evaluators from beginning to review all proposals upon receipt but actual scoring should not begin until the Contract Manager has advised the evaluators as to which bidders remain to be evaluated using Form C.) A Form C will be provided to each evaluator at that time indicating those bidders remaining in the evaluation process.

In using Forms A, B, and C, evaluators should score all bidders on an individual item at the same time and then go on to another item rather than going through a single bidder's entire proposal and scoring it in total before going on to another bidder's proposal. Each score should be based on the item currently being evaluated; scoring on that item should not be impacted by scoring on a previous or subsequent item for that bidder.

In assigning points, the following table should be used. The table is identical to the one in the RFP in terms of the floor and cap for each rating. However, in addition, the following table also identifies the midpoint.

Where maximum points equal	Poor	Fair	Good	Excellent
10	0 - 1.3 - 2.5	2.6 - 3.8 - 5.0	5.1-6.3-7.5	7.6-8.8-10
25	0 - 3.2 - 6.3	6.4-9.5-12.5	12.6-15.7-18.8	18.9-22-25
50	0 - 6.3 - 12.5	12.6-18.8-25	25.1-31.3-37.5	37.6-43.8-50
75	0 - 9.4 - 18.8	18.9-28.2-37.5	37.6-47-56.3	56.4-65.7-75
100	0 - 12.5 - 25	26-38-50	51-63-75	76-88-100
200	0 - 25 - 50	51-76-100	101-126-150	151-175.5-200

Until the time proposals are due, a bidder may seek interpretation of some provision of the RFP. Interpretive responses from the Contract Manager will be sent to each prospective bidder. Copies of those interpretive responses will also be sent to evaluators and should be considered when evaluating bidders' proposals.

As indicated earlier, unless it becomes necessary for the Contract Manager to change the following schedule, evaluators should schedule their time in order to comply with the following schedule or any necessary amended schedule.

- August 28, 1996 Bidders' Conference
- October 2, 1996 Bidder's completed technical and price proposals due by 3:00 P.M. eastern time.
- October 4, 1996 FPSC staff to ship set of technical proposals and Forms A or B to each evaluator. Price proposals will not be opened until later in the process.
- October 15, 1996 Accounting evaluators submit completed Form A and primary technical evaluators submit completed Form B to Contract Manager. Out of town evaluators, send your package by Federal Express, billing the Commission, (account no. 192-744-938-270A) and address it to the Florida Public Service Commission, Attn: Richard Tudor, 2540 Shumard Oak Boulevard, Gunter Building, Tallahassee, FL. 32399-0850. Federal Express' telephone number is 1-800-238-5355.
- October 18, 1996 FPSC staff compile pass/fail results of all evaluators and determine whether any bidders have failed on any evaluated items. (When an evaluator rates a bidder as failed on any particular item, the reason for such rating must be identified in the Notes section of the evaluation form.)

- October 24, 1996 Contract Manger determines what errors are caused by "minor irregularities" and notifies bidders of any "minor irregularities".
- October 29, 1996 Final date for bidders to correct "minor irregularities".
- October 31, 1996 Contract Manager determines and notifies evaluators as to which bidders are removed from further consideration and advises evaluators to proceed with scoring of remaining bidders using Form C which will be sent to the evaluators.
- November 12, 1996 Evaluators submit completed Form C evaluations to Contract Manager. Out of town evaluators, send your package by Federal Express, billing the Commission, (account no. 192-744-938-270A) and address it to the Florida Public Service Commission, Attn: Richard Tudor, 2540 Shumard Oak Boulevard, Gunter Building, Tallahassee, FL. 32399-0850. Federal Express' telephone number is 1-800-238-5355.
- November 15, 1996 FPSC staff compiles results of technical evaluations.
- November 18, 1996 Price proposals opened at 10:00 A.M. eastern time.
- November 21, 1996 Staff recommendation on award of contract.
- December 3, 1996 Public Service Commission's consideration of staff recommendation.

Note: If bidders request that some portion of their technical proposals be treated confidential and the material remains confidential until approximately November 12, the following steps will be taken by the evaluators. (Section 364.183, F.S. and 427.704(3)(d), F.S. processes for dealing with confidentiality will concurrently proceed.)

1. The evaluators will be required to review confidential material at the PSC offices at the Gunter Building in Tallahassee.
2. Evaluation of those items dealing with confidential material will be performed before completing Form C and submitting to the Contract Manager.

SAMPLE

**FLORIDA RELAY SYSTEM
PROPOSAL EVALUATION FORM A**
EVALUATOR: _____

CHECK LIST ITEM **BID SECURITY DEPOSIT**
53 **RFP REF. C.6**

AT&T **NOTES**

PASS FAIL
(CIRCLE ONE)

MCI **NOTES**

PASS FAIL
(CIRCLE ONE)

SPRINT **NOTES**

PASS FAIL
(CIRCLE ONE)

NOTES

PASS FAIL
(CIRCLE ONE)

SAMPLE

ORDA RELAY SYSTEM

PROPOSAL EVALUATION FORM B

EVALUATOR: RICHARD TUDOR

CHECK LIST ITEM 2	TRANSMITTAL LETTER, ADDRESS, CONTACT PERSON, TEL. & FAX NO. and LEGAL NAME OF BIDDER RFP REF. C-2
AT&T PASS FAIL (CIRCLE ONE)	NOTES
MCI PASS FAIL (CIRCLE ONE)	NOTES
SPRINT PASS FAIL (CIRCLE ONE)	NOTES
 PASS FAIL (CIRCLE ONE)	NOTES

DATE: _____

EVALUATOR'S SIGNATURE: _____

SAMPLE

ORIDA RELAY SYSTEM

PROPOSAL EVALUATION FORM C

EVALUATOR: RICHARD TUDOR

CHECK LIST ITEM 9 MAXIMUM POINTS AVAILABLE 100	MINIMUM CA QUALIFICATIONS and TESTING RFP REF. B8
AT&T POINTS: _____	NOTES _____ _____ _____ _____ _____
MCI POINTS: _____	NOTES _____ _____ _____ _____ _____
SPRINT POINTS: _____	NOTES _____ _____ _____ _____ _____
POINTS: _____	NOTES _____ _____ _____ _____ _____

DATE: _____

EVALUATOR'S SIGNATURE: _____

SAMPLE

Florida Public Service Commission
Telecommunications Relay Service System

Reference Check for Relay Center Bidders

Your name/organization was provided to us as a reference for the vendor listed below. In order to evaluate the vendor, please complete the following reference check form and return by facsimile to Mr. Don McDonald at 904-413-6571.

Reference Check For: _____

1) Contact Name and Title: _____

2) Contact Business name and address: _____

3) Contact Telephone and Facsimile: _____

4) Does the vendor provide relay service in your state? _____ (name of state) _____ How long? _____

A) If yes, please indicate your standards for the following:

a) answer time: standard- _____

Is this standard being met? Yes _____ No _____

b) blocking: standard- _____

Is this standard being met? Yes _____ No _____

c) outages: standard- _____

Is this standard being met? Yes _____ No _____

B) If no, what is your relationship with this vendor? _____

5) Any problems with current vendor? _____

6) Any comments about the bidder that could effect our decision? _____

7) If this was your independent decision, would you hire this vendor again? _____
