## SAMPLE INSTRUMENT FOR PROPOSAL REVIEWS

## Proposal Rating Form (Excluding Price Proposal)

| Proposal Evaluation<br>Criteria     | Definition  | Points and Weighting<br>(On a Scale of 80)   | Reviewer Comments<br>and Questions |
|-------------------------------------|---|--|------------------------------------|
| 1. Background information           | The individual, organization or professional service firm practices in an area directly relevant to the needs of the religious institute and has an established history of providing the services required. | Proposals from individuals, organizations or professional service firms that do not practice in a directly relevant area or who do not have an established history providing professional services will neither be reviewed nor rated by proposal review team.   |                                    |
| 2. Understanding of institute needs | The individual, group or professional service firm proposing conveys an understanding of the institute's needs, circumstances and goals for the strategic property planning process.                        | <ul> <li>Points =</li> <li>This criterion is worth up to 15 points.</li> <li>A maximum of 15 points is possible if the description reflects a full understanding of the institute's needs and is conveyed in the proposing entity's own words.</li> <li>A maximum of 10 points is possible if the description reflects a general understanding of the institute's needs and is conveyed in the proposing entity's own words.</li> <li>A maximum of 5 points is possible if the understanding is minimal or simply parrots back language in the RFP.</li> </ul> |                                    |

| 3. Approach and timetable           | The individual, group or professional service firm proposing describes a comprehensive process, plan and approach to providing the scope of services described in the RFP and a reasonable timetable for completion.           | Points =  This criterion is worth up to 25 points:  • A maximum of 25 points is possible if the proposing entity describes a well thought out and detailed approach and process to providing the scope of services described in the RFP, and the proposed timetable is reasonable and realistic.  • A maximum of 15 points is possible if the proposing entity's description of the process and approach to providing the scope of services described in the RFP is adequate but general and the timetable is reasonable and realistic.  • A maximum of 10 points is possible if the approach the proposing entity describes is too general, lacks detail or the timetable is unreasonable or unrealistic. |  |
|-------------------------------------|--|--|--|
| 4. Qualifications and staffing plan | The extent to which the individual, group or professional services firm and the specific individuals who will be providing services are qualified by virtue of their education, background, experience and areas of expertise. | <ul> <li>Points =</li> <li>This criterion is worth up to 20 points:</li> <li>A maximum of 20 points is possible if the specific individuals who will be providing services have an extensive history providing services to religious institutes similar to those described in the RFP.</li> <li>A maximum of 10 points is possible if the proposing entity has limited experience serving religious institutes or if the qualifications or experience of any individual are limited or lacking in a significant way.</li> </ul>  |  |
| 5. References                       | Input from other religious institutes for  | Points =   |  |

| whom the individual, group or professional services firm has provided similar services. | <ul> <li>A maximum of 20 points is possible only if all references checked provide positive feedback about the proposing entity and the specific individuals who will be providing the services described in the RFP.</li> <li>A maximum of 10 points is possible if one or more references express significant reservations about the qualifications of the proposing entity or the specific individuals who will be providing the services described in the institute's RFP.</li> </ul> |  |
|---|---|--|
|   | Total Points =  |  |