**Calgary Homeless Foundation**

**RFP Project Advisory Committee Guide**

**2013 PROCESS OVERVIEW**

**Orientation of the Panel**

Email Panel Guidebook.

**Delivery of Evaluation Workbooks to RFP Coordinator**

Evaluation workbooks, with scoring complete, are to be submitted via email to:

Name:

Email:

Receipt of all workbooks will be confirmed by return email.

**Meeting of the Panel: Panel discussion and Recommendation for Funding**

The individual panel scores will be compiled for presentation to the Panel for discussion. The Panel will come to a group consensus on the funding recommendation and presents written and signed document to CHF. (Template to be completed during the course of the meeting will be provided by the RFP Coordinator).

**REVIEW AND EVALUTATION SCHEDULE**

|  |  |  |
| --- | --- | --- |
|  | **RFP 2013-01** | |
| Panel Members – 3 CHF & 3 Community | CHF: | Community: |
| Deadline for Proposals | April 25, 2013 4:00PM | |
| **Delivery of Proposals and Evaluation Workbook to Panel by email** | **April 25, 2013 5:00PM** | |
| **Delivery of completed Workbooks by Panel to RFP Coordinator by email to:** | **April 26, 2013 Noon** | |
| **Panel Meeting: Evaluation and Recommendation**  Presentation of compiled scoring, discussion of Proposals and recommendation | **April 26, 2013**  1:00PM – 4:00PM  CHF Office – Founder’s Room | |
| Notification of Panel recommendation to Unsuccessful Proponents Issued | April 30, 2013 | |
| Notification of Panel recommendation to Successful Proponents Issued | May 8, 2013 | |

**Table of Contents**

[Reviewer Responsibilities Form 3](#_Toc354583896)

[Conflict of Interest 3](#_Toc354583897)

[Agreement on Scope of Work 3](#_Toc354583898)

[2013 RFP Project Advisory Committee Guide 4](#_Toc354583899)

[INTRODUCTION 4](#_Toc354583900)

[COMMUNICATIONS WITH PROPONENT OUTSIDE PANEL 4](#_Toc354583901)

[INDEPENDENT JUDGMENT 4](#_Toc354583902)

[RESPONSIVENESS 4](#_Toc354583903)

[REVIEWING PROPOSALS 5](#_Toc354583904)

[EVALUATION WORKBOOK 5](#_Toc354583905)

[RECOMMENDATION FOR AWARD 6](#_Toc354583906)

[RECORD KEEPING 6](#_Toc354583907)

[PROTESTS AND APPEALS 6](#_Toc354583908)

REFERENCE MATERIAL APPENDIXES

CHF Request for Proposal with Schedules and Eligible Cost Guidelines for CHF Funded Programs (available on CHF website <http://calgaryhomeless.com/agencies/rfp/>)

Questions & Answers (as posted on CHF website)

Calgary’s 10 Year Plan to End Homelessness

Reviewer Responsibilities Form

Conflict of Interest

I hereby certify that to the best of my knowledge I do not have a conflict of interest and that my particular circumstances are not likely to raise that appearance of a conflict of interest with respect to any proposal in this competition. For purposes of this agreement I recognize that I will be considered to have a financial interest, and therefore a conflict of interest, if any of the following has a financial interest in a grant application:

1. I, my spouse, partner, or minor child;
2. A profit or nonprofit organization in which I serve as an officer, director, board member, trustee, partner, or employee; or
3. Any person or organization with whom I am negotiating or have an arrangement concerning prospective employment.

I recognize that this certification is a continuing representation. I acknowledge it is in effect at all times until I have completed all of the work to be performed by me under this agreement.

If I discover that I might have a conflict of interest or the appearance of a conflict of interest with any application in this competition, I will inform the RFP Coordinator immediately.

|  |  |  |
| --- | --- | --- |
| Signature of Reviewer |  | Date |

### 

Agreement on Scope of Work

1. I will attend the Project Advisory Committee “the Panel” meetings as outlined in the RFP Evaluation Schedule;
2. Before reviewing and scoring any application, I will carefully read all instructions to reviewers, priorities (if applicable), regulations, criteria, and the evaluation worksheets, all of which will be made available to me by the RFP Coordinator;
3. I will carefully review and score all applications provided to me;
4. I will score each application solely on its content and to the degree to which the application meets the appropriate priorities and criteria; and
5. I will complete an evaluation worksheet for each application, record the scores in the space(s) provided and return it to the RFP Coordinator by the date specified in the Evaluation Schedule.

|  |  |  |
| --- | --- | --- |
| Signature of Reviewer |  | Date |

|  |  |
| --- | --- |
| **Name:** |  |
| **Employer:** |  |
| **Position Title:** |  |
| **Phone Number (day time):** |  |
| **Email Address:** |  |

2013 RFP Project Advisory Committee Guide

INTRODUCTION

The review process begins with selecting the reviewers. The Calgary Homeless Foundation (“CHF”) determines the number and makeup of the Project Advisory Committee (the “Panel”). To ensure that all proposals receive consistent, reliable scores and helpful, well considered comments, reviewers are chosen by experience with the RFP target population and program type, and their ability to be impartial during the reviewing process. All reviewers are assigned the same proposals to review.

COMMUNICATIONS WITH PROPONENT OUTSIDE PANEL

Community Panel members will need to review and evaluate each proposal individually, without discussing their evaluation with other Panel members. Community panel members must only discuss this RFP within the activities of the Panel.

It is not appropriate for any Panel member to have direct communication with any of the proponents regarding proposals outside of the formal in-session communications arranged by the RFP Coordinator. Any attempt by a proponent to have direct or indirect communication with a Panel member regarding proposals, outside of a Panel meeting, should be avoided and reported to the RFP Coordinator with date/time, name, and Panel member response.

INDEPENDENT JUDGMENT

In evaluating proposals, Panel members must exercise “independent judgment.” Panel members have been entrusted with an essential part of an important public decision, and must exercise judgment in a manner that is not dependent on anyone else’s opinions or wishes.

Panel members can seek to increase their knowledge before awarding points by asking questions and seeking appropriate information. Ensure, however, that judgment is not influenced by another person’s wishes (i.e. a desire that a particular Proponent is awarded more points.)

The exercise of independent judgment applies not only to possible influences from outside the Panel, but also to influences from other Panel members. It is normal and acceptable for there to be debate, even passionate debate, within the Panel about how well a proposal meets the evaluation criteria. As an independent evaluator you may be swayed by debate in making your judgment about many points you wish to award, which is acceptable. However, evaluators may not act in a concerted way to either favor or disfavor a particular proposal or group of proposals, as the evaluation would not be based upon the independent judgment of the individual evaluators.

RESPONSIVENESS

The RFP Coordinator will to review all proposals for responsiveness before distributing them to the Panel. This will prevent the evaluation team from reading a proposal that does not meet the base RFP requirements. A Proponent that submits a proposal is considered “responsive” if their proposal has been prepared in full compliance with the requirements of the RFP. The Panel will not evaluate proposals deemed non-responsive.

REVIEWING PROPOSALS

We recommend that Panel members read each proposal twice—the first time for understanding, without evaluating. Then, review and evaluate each proposal to measure the quality and degree of compliance with the evaluation criteria. Make notes and give initial ratings on the evaluation score sheet. Remember, the comments become filed documents after the contract award.

* Familiarize yourself with the RFP, the review criteria, content requirements and content priorities.
* Read the rating scale and familiarize yourself with the evaluation worksheet.
* Highlight sections that address the content requirements or priorities.

Cost is to be considered after the “qualitative” factors have been evaluated.

EVALUATION WORKBOOK

The Evaluation Workbook will be set up with one summary sheet containing each Proponent and the marking criteria to be reviewed and evaluated. The document is to be completed electronically and returned to the RFP Coordinator by the date/time outlined in the Evaluation Schedule.

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
|  | **Marking Criteria** | |  | **Comments** | **Raw score** | **Weighting** | **Weighted Score** |
| **Proponent #1** | Experience… | |  |  |  |  |  |
| Operating a hotline/crisis line | | |  |  | 20% | 0 |
| Operating a coordinated common portal for objective and unbiased system-wide referrals | | |  |  | 20% | 0 |
| Operating a centralized database and website | | |  |  | 20% | 0 |
| Developing relationships with organizations serving various sub-populations | | |  |  | 8% | 0 |
| Navigating the homeless serving sector | | |  |  | 8% | 0 |
| Implementing standard assessments and triage tools to determine program eligibility | | |  |  | 8% | 0 |
| Working with vulnerable populations, specifically those experiencing homelessness | | |  |  | 8% | 0 |
| Staffing Model |  | |  |  | 8% | 0 |
| **Weighted Total Score** | | |  | **0** | **100%** | **0** |

How to complete an evaluation worksheet:

* Save the top scores for proposals that surpass the standards set by the RFP.
* Provide helpful comments, being as specific as possible. Refrain from using subjective words such as “bad” or “good.”
* For clarity, reference specific parts of the proposal. Quote the proposal if necessary.
* Try to phrase everything as a statement. Questions aren’t wrong, but statements are less ambiguous than questions.
* Award points after making comments.
* Score using whole numbers.
* Individual scores will be compiled and form the group scoring and ranking of proposals. The final group scores, signed by all Panel members, will form part of the filed documentation and the initial individual scores will be shredded.

RATING SCALE FOR USE IN EVALUATION

The rating scale establishes standards by which points are assigned to proposals, and it ensures that members of the Panel evaluate each proposal with consistency.

|  |  |
| --- | --- |
| Rating Scale for Use in Assessing Proponent Responses | |
| **Value** | **Explanation** |
| 0 | Not addressed or response of no value |
| 1 | Limited applicability |
| 2 | Some applicability |
| 3 | Substantial applicability |
| 4 | Entirely applicable |

A zero value typically constitutes no response or an inability of the vendor to meet the criterion. In contrast, the maximum value should constitute a high standard of meeting the criterion.

If criteria can be evaluated as only “yes” or “no”, then the rating scale would have only two possible values (i.e., the maximum points or a zero).

RECOMMENDATION FOR AWARD

The recommendation of the Panel to CHF for the selection of a Preferred Proponent or Proponents will be a written and signed document representing the group decision by the Panel members.

RECORD KEEPING

The final group scores, signed by all Panel members, will form part of the filed documentation and the initial individual scores shredded. The signed funding recommendations of the Panel will also be kept on file.

PROTESTS AND APPEALS

Protests and Appeals are a part of procurement. CHF has offered both a debriefing for those Proponents who are unsuccessful as well as a formal RFP Appeal Process (See Section 7 of the RFP).

**Thank you for your participation in this RFP process!**