



Appendix 5-5 Statement of Qualifications Evaluation

FOR SHORT-LISTING / INTERVIEWS

The following model is provided for your use as appropriate for your specific situation. The weights and rating values assigned should be the same as those stated in the Request for Statements of Qualification and used for the interviews, which you will do later. Complete a sheet for each firm submitting qualifications.

The highest number represents the most value for each column. **Weight column:** 1-10 depending on value to the project. Use the weight column to indicate the level of importance (in your judgment), in each area, to the particular project. **Rating column:** 1-5 points. In this column you rate the firm based on each qualification. Multiply the rating by the weight for each category and enter the total. Add all totals to establish the grand total.

Firm:	
Contact Person:	
Project Description:	
Address:	
Phone:	

INDIVIDUAL EVALUATION

	WEIGHT	X	RATING	=	TOTAL
1. The proposer's documented capacity to perform required services.		X		=	
2. Evaluation of assigned personnel including but not limited to: - Representative of the community being served - Bringing a variety of strengths and knowledge bases, including lived experience - Technical experience with scope of work		X		=	
3. Related experience (as appropriate). - equity-centered technical services - culturally-responsive planning, implementation, and evaluation - community engagement - other _____		X		=	
4. Proven experience working within project budget and implementing cost		X		=	



Appendix 5-5 Statement of Qualifications Evaluation

controls.					
5. Demonstrated knowledge of the local community and experience building local trust-based relationships.		X		=	
6. Analysis of narrative statement. (One page)		X		=	
7. Reference check (evaluation transfer from reference check form).		X		=	
8. Demonstrated experience centering equitable processes and outcomes in service provision		X		=	
9. MBE/WBE, Section 3, Small Business		X		=	
10. Cost Comparison (RFP Only)		X		=	
Name of Reviewer:	Grand Total:				

NOTE: Grantees should determine the actual evaluation criteria based on their unique community, project and procurement needs. More information on an equity driven procurement can be found in Appendix B: Equity and Belonging Toolkit.



Appendix 5-5 Statement of Qualifications Evaluation

THE REFERENCE CHECK

Firm Being Checked:

Project Referenced:

Person Contacted:

Phone:

References provided in firm's proposal or from others who have worked with the firm.

SAMPLE QUESTIONS TO BE ASKED: (Owner may wish to add to this list of questions.)

	5 Excellent	4 Good	3 Average	2 Fair	1 Poor
1. What project did the firm perform for you?					
2. When was it completed?					
3. What was the scope of services? (Design work, construction phase services, studies, other).					
4. How well did the firm center equity in planning, design, implementation, and/or evaluation?					
5. How well did the firm relate and respond to the wisdom and needs of local community members and folks from a variety of backgrounds and cultures?					
6. Was the project completed on schedule?					
7. Was the budget, cost control					



Appendix 5-5 Statement of Qualifications Evaluation

and financial administration within the planned controls and limitations?					
8. Did the firm and (you) the owner work well as a team in relation to the project?					
9. Did the firm's personnel work well with the committee/board's staff and on all of the project's specific requirements?					
10. How would you rate the value you received to the cost of the firm's services?					
11. What is your overall evaluation of the firm based on your experience?					
12. Would you use this firm on a similar project?					
GRAND TOTAL					

GROUP QUALIFICATIONS EVALUATION SUMMARY SHORT-LISTING

The group evaluation form is provided for the chairperson of the evaluation group to evaluate the results of the process. Use it to develop a short - list of firms who submitted qualifications down to the number desired (firms to be interviewed.)

FIRM NAME				
Reviewer 1				
Reviewer 2				
Reviewer 3				
Reviewer 4				
Reviewer 5				



Appendix 5-5 Statement of Qualifications Evaluation

GRAND TOTALS				
---------------------	--	--	--	--