

## EXHIBIT 4-D.2

### SAMPLE SELECTION CRITERIA FOR EVALUATING PROPOSALS

CONSULTANT: \_\_\_\_\_

#### RANKING FACTORS

##### 1. QUALITY OF THE PROPOSAL

- a. Does the proposal respond comprehensively to the tasks outlined in the request for proposals (RFP)? **Comment:**
  
- b. Does the proposal reflect a good understanding of the technical issues involved in the project? **Comment:**
  
- c. Does the proposal indicate an understanding of the requirements associated with a HOME project (and the other state or federal funding sources involved)? **Comment:**
  
- d. Has the consultant provided a clear description of how the work will be managed and how the consultant will coordinate with local officials and staff? **Comment:**
  
- e. Has the consultant provided a step-by-step timetable for the work, with milestones indicating when key tasks will be performed and by whom? Does the schedule appear complete and realistic? **Comment:**

##### ADDITIONAL FACTORS FOR ENGINEERING ONLY:

- f. Did the proposal include more than one technical alternative? If so, do the alternatives appear appropriate to the community's location, size, and financial and physical constraints? **Comment:**
  
- g. Does the recommended alternative minimize long-term operation and maintenance costs? **Comment:**

**SCORE FOR QUALITY OF PROPOSAL:**

_____	EXCELLENT	(200 POINTS)
_____	ABOVE AVERAGE	(150 POINTS)
_____	AVERAGE	(100 POINTS)
_____	BELOW AVERAGE	(50 POINTS)
_____	POOR	(0 POINTS)

**2. CONSULTANT QUALIFICATIONS AND EXPERIENCE**

- a. Does the consultant have experience with similar federally financed projects? **Comment:**
  
- b. Does the staff to be assigned to the project on a day-to-day basis have technical training and experience appropriate to the scope of work in the RFP? **Comment:**
  
- c. To what extent will experienced senior staff be available to supervise project staff on-site? **Comment:**
  
- d. If the consultant has previously done work for the community, how did he/she perform? **Comment:**
  
- e. How do previous clients rate the consultant's performance? What is the consultant's track record on similar projects for timely performance within original budgets? **Comment:**
  
- f. Are the reference checks supportive of the consultant's technical abilities and ability to work cooperatively with local officials? **Comment:**

**SCORE FOR CONSULTANT EXPERIENCE AND QUALIFICATIONS:**

_____	EXCELLENT	(200 POINTS)
_____	ABOVE AVERAGE	(150 POINTS)
_____	AVERAGE	(100 POINTS)
_____	BELOW AVERAGE	(50 POINTS)
_____	POOR	(0 POINTS)

### 3. AVAILABILITY AND CAPACITY OF THE CONSULTANT

- a. What is the current and projected workload of the consultant; will the consultant have enough time available to devote to the project? **Comment:**
  
- b. Where is the firm located? **Comment:**
  
- c. How much time will the consultant or staff actually spend in the community on a day-to-day basis over the term of the project? **Comment:**
  
- d. Is the consultant capable of meeting the time and budget requirements for the project? **Comment:**

#### SCORE FOR AVAILABILITY AND CAPACITY OF THE CONSULTANT:

_____	EXCELLENT	(100 POINTS)
_____	ABOVE AVERAGE	(75 POINTS)
_____	AVERAGE	(50 POINTS)
_____	BELOW AVERAGE	(25 POINTS)
_____	POOR	(0 POINTS)

### 4. PROPOSED COMPENSATION SCHEDULE (*MANAGEMENT SERVICES ONLY*)

- a. Is the proposed compensation comparable to compensation proposed in other responses to the solicitation? **Comment:**
  
- b. Is the proposed compensation comparable to historical/previous prices for similar services? **Comment:**
  
- c. Is the proposed compensation comparable with current market prices? **Comment:**
  
- d. Is the proposed compensation comparable with internal estimates? **Comment:**
  
- e. Is the proposed compensation considered fair and reasonable? **Comment:**

**SCORE FOR PROPOSED COMPENSATION SCHEDULE:**

_____	EXCELLENT	(100 POINTS)
_____	ABOVE AVERAGE	(75 POINTS)
_____	AVERAGE	(50 POINTS)
_____	BELOW AVERAGE	(25 POINTS)
_____	POOR	(0 POINTS)

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**OVERALL SCORE FOR THIS CONSULTANT:**

_____	SCORE ON QUALITY OF PROPOSAL
_____	SCORE ON CONSULTANT QUALIFICATIONS & EXPERIENCE
_____	SCORE ON AVAILABILITY AND CAPACITY OF CONSULTANT
_____	SCORE ON PROPOSED COMPENSATION SCHEDULE ( <i>Management Services Only</i> )
_____	<b>TOTAL SCORE</b>

DATE: \_\_\_\_\_

**Note:** The above factors and questions are examples that are designed to fulfill federal requirements, as well as Montana's law regarding procurement of engineering, architectural, or surveying services. You may want to adapt your RFP, including your evaluation factors and system for awarding points, to the key issues involved in your project and the type of assistance you are seeking. **If you modify the sample factors or questions, please keep in mind that Montana law (*Section 18-8-204, MCA*) sets out minimum criteria that should be considered for selection of architects, engineers, or surveyors. The factors involved in reviewing responses to an RFP for management services may be different from those involved in an RFP for architectural/ engineering services.**

## CONSULTANT SCORING MATRIX

EVALUATION FACTOR	Consultant 1	Consultant 2	Consultant 3	Consultant 4	Consultant 5	Consultant 6	Consultant 7
<b>1. QUALITY OF PROPOSAL</b> ( ___ Points Maximum)							
<b>2. CONSULTANT QUALIFICATIONS / EXPERIENCE</b> ( ___ Points Maximum)							
<b>3. AVAILABILITY AND CAPACITY OF CONSULTANT</b> ( ___ Points Maximum)							
<b>4. PROPOSED COMPENSATION SCHEDULE            (MANAGEMENT SERVICES ONLY)</b> ( ___ Points Maximum)							
<b>TOTAL SCORE:</b>							