PEM for RFCON

[**PEM** – Proposal Evaluation Methodology; **RFCON** - Request for Consultant]

< S y s t e m   N a m e >

> This document will guide the examination team for RFCon _____
> (dated _____) in selecting a system analysis contractor for the
> _____ system. Proposals will be evaluated in accordance with this
> document and with the RFCon supplied to the bidders.

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1. General – Administration

This document will guide the examination team for RFCon _____ (dated _____) in selecting a system analysis contractor for the _____ system. Proposals will be evaluated in accordance with this document and with the RFCon supplied to the bidders.

1.1 The Examination Process

The examination process includes the following steps and milestones:

a. A check for compliance with all requirements of the Administration section and with all Level 1 and Level 2 Go/NoGo conditions.

b. A meeting of the RFP committee to select proposals for further examination.

c. Examination of the benefit side: the technical/professional sections of the RFCon.

d. Examination of costs.

e. Summation of cost/benefit.

f. Final meeting of the RFP committee.

1.2 The Examination Team

The examination team consists of the following members:

- _____
- _____
- _____

The project executive committee consists of the following members:

- _____
- _____
- _____

1.3 Definitions

- _____

1.4 Cost/Benefit Ratio

Proposals are to be examined against this cost/benefit ratio:

Cost: _____, benefit: _____

1.5 Sources of Information

These are the sources of information for this proposal examination:

- The proposals submitted in writing by the bidders

- The opinions requested from the following consultants:
  _____

- Demonstrations by the bidders

- < further sources >

1.6 Tools and Techniques

These are the techniques and computerized tools to be used in the proposal examination:

- _____

- _____

- _____

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2. Go/NoGo Conditions

Following are details of the Go/No-Go (threshold) conditions for the RFCon. These factors belong to three categories:

1. Mandatory conditions

2. Mandatory benefits (qualities)

3. Maximum and/or minimum costs

Only if all its Go/No-Go factors are satisfactory will a proposal qualify for further (phase 2) evaluation and for final cost/benefit comparison with other proposals. Details follow.

2.1 Mandatory Conditions

The mandatory conditions are all the items that are labelled "Mandatory" in the RFCon. Failure to meet the mandatory conditions will disqualify the proposal. The following tables show examples of mandatory conditions and of criteria for assessing compliance with them.

Condition	Level	Guidelines/Criteria	Results
Summary:		**Decision:**	**Explanation:**

Table 1: Go/No-Go Table for a Bidder/Proposal

The next table combines all the bidders' compliance results for the mandatory conditions. The data in this table will guide the decision regarding which bidders, having met the mandatory conditions, will proceed to more comprehensive evaluation.

Condition	Level	Guidelines/Criteria	Bid 1	Bid 2	…	Bid n
Summary:		**Decisions &Explanations:**				

Table 2: Combined Go/No-Go Table for Bidders/Proposals of RFCon \<RFCon name\>

2.2 Mandatory benefits

If there are no mandatory benefits:

Not applicable. The RFCon did not specify a quality (benefit) threshold for proposals. The matter is deferred to the final cost/benefit calculation.

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If there are mandatory benefits:

The RFCon specified a quality (benefit) threshold for proposals, as detailed in section 0.12 within the RFCon's Administration section.

2.3   Mandatory cost range

If there is no mandatory cost range:

Not applicable. The RFCon did not specify a maximum or minimum cost. The matter is deferred to the final cost/benefit calculation.

If there is a mandatory cost range:

A proposal with costs of more than _____ will be disqualified because …

A proposal with costs of less than _____ will be disqualified because …

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3. Examining the Proposals

3.1 General

General method: Proposals for consultants' services, including any elaborations included by the bidders in the proposal, are examined by comparison against the administrative section of the Initiation document according to this PEM.

Grades: Grading is on the customary MethodA scale of 0 to 5 as defined in the RFP Guidebook. For the cost/benefit weightings, see section 0.12 of the RFCon.

3.2 Evaluating Quality (Benefit) in Proposals

In selecting the preferred system analysis proposal for the _____ system, the evaluators will favor proposals that include highly satisfactory responses to the following sections (in descending order of importance):

- _____

3.3 Cost Estimation

In cost estimation for the proposal, take into account the overall price and the fee per hour (assuming a 10% increment) times the organization's usual number of work-hours per month. Make sure that the cost is well connected with the workplan that is in section 0.18.

3.4 Cost/Benefit Summation

For summation, provide a table here in the PEM or use the table from the general PEM template.

The targeted cost/benefit ratio is _____ (as defined in section 0.12 of the RFCon).

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4. Summation and Recommendations

Give the RFP committee a recommendation containing an abbreviated version of the filled-in PEM and a table of summation as follows:

Component / Item	Proposal 1	Proposal 2	Proposal *n*
Overall evaluation:			

Table 3: Summation of Evaluations