

Individual Technical Evaluation Document - Ratings Summary Page

IT Enterprise-wide Systems Support

Vendor: EXCELCORP

Evaluator:

Category	Evaluation Sub Factor	Rating
Management Approach and Technical Capabilities	1. Understanding of the work, including creativity and thoroughness shown in understanding the objectives of the SOW and specific tasks, and planned execution of the project.	E
	2. Evidence of specific methods and techniques for completing each discrete task, to include such items as quality assurance, and customer-service.	E
	3. Ability to address anticipated potential problem areas, and creativity and feasibility of solutions to problems and future integration of new processes and technology enhancements.	E
	4. Degree to which the offerors proposal demonstrates an understanding of logistics, schedule, and any other issues the Government should be aware of.	E
	5. Quality and effectiveness of the allocation of personnel and resources.	E
	Overall Management Approach and Technical Capabilities	
Personnel Qualifications	1. The currency, quality and depth of experience of individual personnel in working on similar projects. Similar projects must convey similarity in topic, dollar value, workload, duration, and complexity.	E
	2. Quality and depth of education and experience on other projects which may not be similar enough to include in response to #1. (Immediately above) but may be relevant.	E
	3. The currency, quality and depth of how the Project Director will supervise and coordinate the workforce.	E
	Overall Personnel Qualifications	E
Organizational Experience	1. Evidence that the organization has current capabilities; and for assuring performance of this requirement. Evidence of supporting subcontractors, consultants and business partners will be considered.	E
	2. Appropriate mix and balance of education and training of team members.	E
	Overall Organizational Experience	E
Past Performance	1. The organizations history of successful completion of projects; history of producing high-quality reports and other deliverables; history of staying on schedule and within budget.	E
	2. The quality of cooperation (with each other) of key individuals within your organization, and quality of cooperation and performance between your organization and its clients.	E
	3. The organization's specific past performance on prior similar efforts specified within this SOW.	E
	Overall Past Performance	E
Summary	Overall Technical Rating	E

Vendor Name: EXCELCORP

Evaluator Name:

Management Approach and Technical Capabilities		
Evaluation Sub Factors		
1. Understanding of the work, including creativity and thoroughness shown in understanding the objectives of the SOW and specific tasks, and planned execution of the project.	Strengths	Clearly understands the work objectives & tasks – and approach. Using stated objectives has identified critical success factors that are foundational and create a strategic approach to providing the required IT support with other related initiatives and to organizational goals, programs & objectives. Clearly understands the commitment and investment the government has made in changing its organizational culture through the strategic roadmap for providing enterprise-wide IT systems management.
	Weaknesses	
	Deficiencies	
2. Evidence of specific methods and techniques for completing each discrete task, to include such items as quality assurance, and customer-service.	Strengths	The approach demonstrates an understanding of the desired relationship between the contractor and the CIO. It's a collaborative approach we seek with the contractor providing specific advice and expertise we need. EXCELCORP approach provides a perspective that we feel is critical – the use of an Advisory Panel demonstrates an understanding of how we can go about getting buy-in, commitment and ownership from critical senior managers. This approach also helps builds in upfront as well as continuing buy-in from our managers and employees -- and defines an approach to ensure customer service to make this a successful venture. Those that are involved will better understand the effort, buy-in to the value of an enterprise approach, understand their role in addressing issues raised and result in more customer satisfaction. Quality assurance and customer service are addressed in three ways: (1) critical success factors identified in the proposal will provide a clear basis for determining whether the objectives of the contract have been met; (2) use of an Advisory Team will ensure an upfront & on-going quality control and customer service mechanism; and (3) an on-going review and evaluation with the project lead, incorporating feedback from senior managers, will ensure the quality and utility of all work products developed under the contract.
	Weaknesses	
	Deficiencies	
3. Ability to address anticipated potential problem areas; and creativity and feasibility of solutions to problems and future integration of new processes and technology enhancements.	Strengths	Knowledge of the agency – its people, programs and history, as well as a clear understanding of our goals & objectives increases EXCELCORP's ability to anticipate organizational issues and provide strategies that will work in our culture. Also EXCELCORP proposes a strategic approach to selecting individuals to engage in the upfront planning process who can help develop the key messages and other strategies for engaging the organization.
	Weaknesses	

	Deficiencies	
4. Degree to which the offerors proposal demonstrates an understanding of logistics, schedule, and any other issues the Government should be aware of.	Strengths	EXCELCORP proposes to find ways to meet project demands while not making unnecessary travel or time demands on managers or other agency staff. Understands criticality of alignment of enterprise IT with other key programs and initiatives and their timelines – also understands what many of those key programs are such as the science planning process.
	Weaknesses	
	Deficiencies	
5. Quality and effectiveness of the allocation of personnel and resources.	Strengths	Identified personnel have necessary skills to make their efforts cost effective. Schedule meets contract demands.
	Weaknesses	
	Deficiencies	
Overall summary of Management Approach and Technical Capabilities	EXCELCORP clearly understands our objectives, the bigger picture, the necessary linkages and the agency itself. EXCELCORP not only has the skills, abilities, education & experience to put it all together but their stated organizational philosophy makes it an ideal match for this project. EXCELCORP approaches are defined in a way that shows how they plan to meet our objectives through the tasks using an organizational development approach to stakeholder involvement and customer satisfaction.	

Vendor Name:		Evaluator Name:
Personnel Qualifications		
Evaluation Sub Factor		
1. The currency, quality and depth of experience of individual personnel in working on similar projects. Similar projects must convey similarity in topic, dollar value, workload, duration, and complexity.	Strengths	EXCELCORP has worked on very similar projects with both the agency and the department as well with other organizations that provide a real currency of experience. Quality of the efforts we know first hand and from talking with other agencies within our department.
	Weaknesses	
	Deficiencies	
2. Quality and depth of education and experience on other projects which may not be similar enough to include in response to #1. (Immediately above) but may be relevant.	Strengths	Educational credentials of each EXCELCORP staff brings credibility that we need on this project. Their backgrounds are well-rounded and balanced and will bring a perspective our agency will benefit from.
	Weaknesses	
	Deficiencies	
3. The currency, quality and depth of how the Project Director will supervise and coordinate the workforce.	Strengths	Supervising and coordinating the EXCELCORP workforce will be done by one lead Project Manager – and will review project performance and progress against milestones, time & cost estimates with the government Program Manager on a monthly basis.
	Weaknesses	
	Deficiencies	
Overall summary for Personnel Qualifications	EXCELCORP brings all the personnel qualifications we need to approach the project as we want to – they provide the experience from design and development through to follow-up action planning experience as well as the understanding of important aspects of the approach – organizational development and the important linkages to other agency efforts	

Vendor Name:		Evaluator Name:	
Organizational Experience			
Evaluation Sub Factor			
1. Evidence that the organization has current capabilities; and for assuring performance of this requirement. Evidence of supporting subcontractors, consultants and business partners will be considered.	Strengths	EXCELCORP performance with our agency on all efforts has been exceptional. Understanding from the department that the same is true there. From the positions and the clients the individual contractors have had – it seems likely they would have an excellent performance record – such as multiple contracts with both our agency and the department.	
	Weaknesses		
	Deficiencies		
2. Appropriate mix and balance of education and training of team members.	Strengths	EXCELCORP team has an excellent balance of education, experience and training to provide this project with all that it needs.	
	Weaknesses		
	Deficiencies		
Overall summary for Organizational Experience	EXCELCORP’s organizational philosophy, past experience, skills, and education of team members – all make EXCELCORP a perfect match for this project. They not only have the technical experience and educational background but also the experience around enterprise-wide IT support – using an organization development approach – that gets us to creating the meaningful change within the agency.		

Vendor Name: EXCELCORP		Evaluator Name:
Past Performance		
Evaluation Sub Factor		
1. The organizations history of successful completion of projects; history of producing high-quality reports and other deliverables; history of staying on schedule and within budget.	Strengths	Excellent – based on our past experience with them. In talking to other agencies within the department, they have had a similar – quality experience with EXCELCORP.
	Weaknesses	
	Deficiencies	
2. The quality of cooperation (with each other) of key individuals within your organization, and quality of cooperation and performance between your organization and its clients.	Strengths	Again, based on our experience with EXCELCORP – this is one of the strengths of the organization.
	Weaknesses	
	Deficiencies	
3. The organization’s specific past performance on prior similar efforts specified within this SOW.	Strengths	Based on our experience mentioned in the proposal, excellent. Other agencies in our department – very similar needs – similar excellent experience.
	Weaknesses	
	Deficiencies	
Overall summary for Past Performance	The key technical lead of EXCELCORP served as the lead on the predecessor support contract. Her past performance clearly proves her capability to meet the demands of this project/contract.	

Evaluation Summary

Vendor Name:

**Overall
Summary of
contractor's
technical
proposal**

EXCELCORP understands our stated objectives and our desired approach to enterprise IT management, systems development, and support. Their consulting team has the right combination of skills, experience, education that makes EXCELCORP a good match for this project. Program management, ITIL, Systems Development, Call Center Management, and Performance Measurement among others will ensure project success.

EXCELCORP identified the critical success factors to achieving our stated objectives then laid out a strategy for achieving those success factors. EXCELCORP clearly has an understanding of the project requirements and the direction our agency wishes to take.

Overall Rating: Excellent

Evaluator Name and Signature:

Date:

Technical Evaluation Rating Definitions

Ensure the Ratings Match the Strength & Weakness Narrative

Rating	Abbreviation	Risk Level	Definition
Excellent	E	Very Low Risk	The proposal contains no deficiencies or weaknesses. Based on information provided, there is no doubt that the offeror demonstrates an exceptional understanding of the services required to meet or exceed most contract requirements. The highest quality of contract performance is anticipated.
Very Good	VG	Low Risk	The proposal contains no deficiencies and only a few minor weaknesses that do not require discussions. Based on the information provided, there is little doubt that the offeror demonstrates a high quality of understanding of the services required to meet or exceed some contract requirements.
Satisfactory	S	Moderate Risk	The proposal contains no deficiencies and some weaknesses. Based on the information provided, the Offeror demonstrates an understanding of the services required to meet contract requirements.
Poor	P	High Risk	The proposal contains deficiencies and significant weaknesses. Based on information provided, there is doubt that the contractor understands the services required to meet the contract requirements. Requirement/services can be met only with major changes to the proposal.
Unacceptable	U	Unacceptable Risk	Technical proposal has many deficiencies and/or gross omissions; failure to understand much of the scope of work necessary to perform the required tasks; failure to provide a reasonable, logical approach to fulfilling much of the government's requirements; failure to meet many personnel requirements in the solicitation. (When applying this adjective to a proposal as a whole, the technical proposal would have to be so unacceptable in one or more areas that it would have to be completely revised in order to attempt to make it other than unacceptable.)