

Scorecard #1
TOWN OF ERIE, PLANNING DIVISION
PRELIMINARY SELECTION/EVALUATION FORM
COMPREHENSIVE PLAN - CONSULTANT SERVICES
QUALIFICATION BASED SELECTION

Ratings: Evaluator to assess the strength of each firms’ qualifications and assign a numerical rating of 1 to 5 with 5 being the highest rating. (Use whole numbers)

Evaluator Name:

Date:

Name of Firm:

Name of Project:

SCORE (PROJECT SPECIFIC QUALIFICATIONS):

Weight x Rating = Score

1. Work Plan and Project Approach
1. Approach demonstrates an understanding the unique elements of the project.

2. Rational and organized approach to analyzing and solving key issues.

3. Proposed work plan provides detailed description of the specific tasks.

4. Consultant team members and community engagement partners assigned to lead and participate in specific tasks clearly defined.

5. Recommended tasks not identified in the RFP are clearly explained and considered necessary.

6. Flexibility in approach does not affect timeline or budget.

7. Adequate quality of control for: document accuracy, staying on schedule, staying on budget, and fulfilling tasks is provided.
2. Community Engagement
1. Community engagement process is clearly defined.

2. Scheduling of community engagement is effective.

3. Community engagement partner’s roles are clearly defined in the work tasks and scheduling.

4. Appropriate approaches are proposed to engage a broad spectrum of the community.

5. Appropriate approaches are proposed to engage specific sub-groups.

6. Creativity and variety of community outreach approaches are provided.
3. Schedule
1. Project schedule identifies task target start date and duration.

2. Project schedule meets Town timeline for adoption of the plan.
4. Relevant Experience
1. Similar projects successfully completed by lead consultant and the sub-consultants that had direct experience.

2. Experience of team members that have worked together on previous projects. Projects detailed and relevant.

3. List of clients (2-5) for whom similar work has been done. Include contact name and phone number
5. Qualifications
1. Complete list of project team and qualifications is provided.

2. Individual team member assignments are clearly defined.

3. Lead firm and project manager identified.

4. Organizational chart is provided showing the relationship of each team member to the lead firm; included are contact name, phone number, email address, and mailing address.

2 x	4	=	8
3 x	4	=	12
2 x	5	=	10
3 x	4	=	12
1 x	5	=	10
1 x	5	=	10
2 x	5	=	10

2 x	4	=	8
2 x	4	=	8
1 x	4	=	8
3 x	5	=	5
3 x	4	=	8
3 x	5	=	5

1 x	4	=	12
1 x	4	=	12

3 x	4	=	8
3 x	4	=	8
1 x	4	=	8

1 x	5	=	10
2 x	5	=	10
2 x	5	=	10
1 x	5	=	10

5.	An estimate of the time each team member will devote to the project is provided.	1 x	1	=	3
6.	Team members qualified to perform all aspects of the project. Team members are identified that have specific areas of expertise needed to prepare the comprehensive plan such as: land use p	3 x	5	=	10
7.	Company resources to complete the project and adequate support staff and production capabilities are available.	2 x	1	=	3
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NOTES:

- **Criteria:** Characteristics of the project under each category to help determine the submitter’s overall qualifications.
- **Weights:** Steering Committee assigned weights, using whole numbers, to all criteria on evaluation forms.
- **Ratings:** Evaluator to assess the strength of each firms’ qualifications and assign a numerical rating of 1 to 5 with 5 being the highest rating. (Use whole numbers)
- **Total Score:** Includes the sum of all criteria.

Scorecard #2
TOWN OF ERIE
ORAL INTERVIEW SELECTION/EVALUATION FORM
CONSULTANT SERVICES

QUALIFICATION BASED SELECTION (This form is to be used in the second step, i.e. oral interview, of consulting services selection process.)

Evaluator Name:

Date:

Name of Firm:

Name of Project:

SCORE (OVERALL QUALIFICATIONS): Weight x Rating = Score

1.	Work Plan and Project Approach	3 x		=	-
2.	Community Engagement	3 x		=	-
3.	Schedule	3 x		=	-
4.	Relevant Experience	3 x		=	-
5.	Qualifications	3 x		=	-
Total Score:					-

NOTES:

- **Criteria:** Agencies/Institutions are encouraged to include additional criteria that reflect unique characteristics of the project under each category to help determine the submitter’s overall qualifications.
- **Weights:** Agency/Institutions to assign weights, using whole numbers, to all criteria on evaluation forms for inclusion into RFQ document and prior to evaluations.
- **Ratings:** Evaluator to assess the strength of each firms qualifications and assign a numerical rating of 1 to 5 with 5 being the highest rating. (Use whole numbers)
- **Total Score:** Includes the sum of all criteria. Note: a passing score (as a percentage of the total points available) is optional and should be assigned by the agency/institution prior to evaluation.

Subtotal 72

Subtotal 42

Subtotal 24

Subtotal 24

Subtotal 56

TOTAL SCORE: 218