|  |  |
| --- | --- |
|  | Roy Cooper  *Governor*  James Weaver  *Secretary and State Chief Information Officer* |

**Contract Award Recommendation**

**INSTRUCTIONS:** *Adjust the highlighted text with the appropriate information. Finalize the document prior to submitting it to the Statewide IT Procurement Office by deleting this box, the directions in red type, and any highlighted areas. Please update the Table of Contents before submitting.* ***Note: Per 09 NCAC 06B.0314, completion of specific sections of the template are required. These sections are highlighted in blue.***

**To:** Statewide Contract Specialist Name

Statewide IT Procurement Office

**From:**  xxx

xxx

xxx

**Date:** Month day, year

**Subject:** Contract Award Recommendation

Name of Bid

**Reference #**: xxxxxx

Enclosed for your review and approval is the award recommendation for RFP xxxx.

Bids received pursuant to a [Request for Proposal (RFP) or Invitation for Bid (IFB)] [normally this would be used only for an RFP award recommendation, however this can be used for an IFB] have been reviewed and an Evaluation Committee hereby requests the Statewide IT Procurement Office award the contract, based upon bid’s evaluation criteria, as follows:

|  |  |
| --- | --- |
| **Description:** | xxxxx |
| **Recommended Vendor:** | Vendor name |
| **Cost:** | $xxx,xxx |
| **Contract Term:** | One (1) year, plus two (2), 1-year optional renewals at the discretion of the State |
| Project Name and Number: Keep and modify if it is an EPMO IT Project | |

Thank you for your assistance. If additional information is required, please do not hesitate to contact me.

cc:Evaluation Committee

Glenn Poplawski, IT Director

Strategy & Governance Executive, PMA

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# Section 1: Introduction

Provide the Executive Summary from the project charter to describe why the RFP was posted.

The Evaluation Committee, consisting of xxx, used a “best value” methodology or [please insert the evaluation methodology language from the bid here] during the evaluation process.

# Section 2: Evaluation Committee

|  |  |  |
| --- | --- | --- |
| **Name** | **Title/Agency** | **Participation Level** |
| Last name, First name | Project Manager  xxx | Project Manager |
| Last name, First name | xxx  xxx | Decision Maker |
| Last name, First name | SME | Decision Maker |
| Last name, First name | Vendor and Contract Manager  Department of Information Technology | Decision Maker |
|  |  |  |
|  | | |
| **Role Definitions:** | | |
|  | | |
| Decision Maker: | Key business stakeholders evaluating the bid responses. | Voting |
| Project Manager: | Overall responsibility includes successful initiation, planning, design, execution, implementation, and closure of a project. | Non-Voting |
| Subject Matter Expert (SME) | Person who is an authority in a particular technical area pertaining to the procurement | Non-Voting |

# Section 3: Evaluation Criteria / Methodology

The selection process was conducted using the “best value” methodology. The evaluation committee met as a group and evaluated the responsive proposals. (\*edit this to modify which evaluation criteria methods were used, this will be from the bid)

The RFP evaluation criteria listed below is in the order of importance: (Modify this section based on Evaluation Criteria from posted bid)

|  |  |
| --- | --- |
| **Posted Bid Criteria** | **Posted Bid Reference** |
| Technical Specifications | **Where is this listed in the RFP?** |
| Cost Proposal |  |
| Application Security Specifications |  |
| Vendor Implementation Plan |  |
| Training Plan |  |
| References |  |
| Key Personnel Qualifications/Experience |  |
| Financial Information |  |

# Section 4: Timeline

|  |  |
| --- | --- |
| **Date** | **Milestone** |
|  | |
| xx/xx/xxxx | RFP Posted |
| xx/xx/xxxx | Addendum 1 Posted (needs explanation) |
| xx/xx/xxxx | RFP Closed |
| xx/xx/xxxx | Bid Opening |
| xx/xx/xxxx – xx/xx/xxxx | Bids Reviewed by Evaluation Committee |
| xx/xx/xxxx – xx/xx/xxxx | Vendor Demos Conducted |
| xx/xx/xxxx – xx/xx/xxxx | Best And Final Offers (BAFO) |
| xx/xx/xxxx | Award Recommendation |

# Section 5: Evaluation of Bid Submission

In response to the RFP, xxx vendors submitted a total of xxx bid proposals. The Statewide IT Procurement Office provided xxx proposals to the evaluation committee for review and consideration.

After review and consideration by the Evaluation Committee of xxx bid proposals, the following vendors were determined to be non-responsive and were not considered for further evaluation.

* Vendor X – why they were not considered for further evaluation
* Vendor Y – why they were not considered for further evaluation
* Vendor Z – why they were not considered for further evaluation

The Evaluation Committee then evaluated the bid proposals for the remaining xxx Vendors: (list the vendor names).

In summary

|  |  |
| --- | --- |
| **Vendor** | |
| List all the Vendors Names | Responsive or Non-Responsive | |
|  |  | |
|  |  | |
|  |  | |
|  |  | |

# Section 6: Vendors

Listed below is a synopsis of each proposal submitted based on the criteria defined in Section 3.

## Non-Responsive Vendors

|  |  |
| --- | --- |
| Non-Responsive | |
| Vendor Name | Why |
|  |  |

## Responsive Vendors

|  |  |  |
| --- | --- | --- |
| **Vendor** | **Requirement** | **Response** |
| Vendor Name | identify the submission requirement or standard. | State whether the vendor met the requirement, or if a standard that the vendor will meet the standard. |
|  |  |  |
|  |  |  |
|  |  |  |

(Note: Criteria below should be the same and/or follow the bid’s Evaluation Criteria)

### Technical Specifications

|  |  |  |
| --- | --- | --- |
| **Vendor** | **Strengths** | **Weakness** |
| Vendor Name | Specify Strength/s or “None”. | Specify Weakness/es or “None”. |
|  |  |  |
|  |  |  |
|  |  |  |

### Proposed Solution [depending on your bid evaluation criteria, if this is not one of them, delete this]

|  |  |  |
| --- | --- | --- |
| **Vendor** | **Strengths** | **Weakness** |
| Vendor Name | Specify Strength/s or “None”. | Specify Weakness/es or “None”. |
|  |  |  |
|  |  |  |
|  |  |  |

### Application Security Specifications [depending on your bid evaluation criteria, if this is not one of them, delete this]

|  |  |  |
| --- | --- | --- |
| **Vendor** | **Strengths** | **Weakness** |
| Vendor Name | Specify Strength/s or “None”. | Specify Weakness/es or “None”. |
|  |  |  |
|  |  |  |
|  |  |  |

### Vendor Implementation Plan [depending on your bid evaluation criteria, if this is not one of them, delete this]

|  |  |  |
| --- | --- | --- |
| **Vendor** | **Strengths** | **Weakness** |
| Vendor Name | Specify Strength/s or “None”. | Specify Weakness/es or “None”. |
|  |  |  |
|  |  |  |
|  |  |  |

Application

### Training Plan [depending on your bid evaluation criteria, if this is not one of them, delete this]

|  |  |  |
| --- | --- | --- |
| **Vendor** | **Strengths** | **Weakness** |
| Vendor Name | Specify Strength/s or “None”. | Specify Weakness/es or “None”. |
|  |  |  |
|  |  |  |
|  |  |  |

Security Specifications

### References [depending on your bid evaluation criteria, if this is not one of them, delete this]

|  |  |  |
| --- | --- | --- |
| **Vendor** | **Strengths** | **Weakness** |
| Vendor Name | Specify Strength/s or “None”. | Specify Weakness/es or “None”. |
|  |  |  |
|  |  |  |
|  |  |  |

### Key Personnel Qualifications / Experience [depending on your bid evaluation criteria, if this is not one of them, delete this]

|  |  |  |
| --- | --- | --- |
| **Vendor** | **Strengths** | **Weakness** |
| Vendor Name | Specify Strength/s or “None”. | Specify Weakness/es or “None”. |
|  |  |  |
|  |  |  |
|  |  |  |

### Financial Information [depending on your bid evaluation criteria, if this is not one of them, delete this]

|  |  |  |
| --- | --- | --- |
| **Vendor** | **Strengths** | **Weakness** |
| Vendor Name | Specify Strength/s or “None”. | Specify Weakness/es or “None”. |
|  |  |  |
|  |  |  |
|  |  |  |

### Cost [This must always be included]

|  |  |
| --- | --- |
| **Vendor** | **Cost Compared to Other Vendors (Comparison Summary)** |
| Vendor Name |  |
|  |  |
|  |  |
|  |  |
|  |  |

### Summary (Summarize how Vendor met all the specifications presented in the bid document.)

|  |  |
| --- | --- |
| **Vendor** | summary |
| Vendor Name | Summary |
|  |  |
|  |  |
|  |  |

# Section 7: Finalist Vendor(s)

Using the evaluation criteria in the bid, the following vendors were considered to be in the competitive range:

[List the vendors here]

[Use the following language only if the evaluation included product demonstrations.]

xxx vendors (vendor names) were requested to provide product demonstrations as potential solutions to meet the State’s requirements.

Vendor was not requested to provide a product demonstration because several significant weaknesses were identified:

* Weakness 1
* Weakness 2

[Use the following language only if the evaluation included negotiations and BAFOs.]

Additional strengths and weaknesses were awarded to the Finalist Vendors based on their oral presentations and product demonstrations. [list or write any changes to each of the vendors strengths and weaknesses because of the demo. If there were none, also document that]

Based on this, negotiations was/were entered into with Vendor which resulted in BAFO X. [negotiations and BAFOs may occur with 1 or more vendors, you will need to list the vendors and outcomes of each one.]

# Section 8: Award Recommendation

The evaluation committee recommends awarding the contract to Vendor the amount of $xxx,xxx.

The following supporting documents that reflect the Vendor selection findings are attached:

1. The Evaluation Committee has determined that Vendor bid substantially conforms
2. The evaluation committee went through a clarification process with Vendors between beginning date and ending date. The evaluation committee decided to move forward with negotiations with vendor/s, as it had the best ranking in critical categories of the evaluation criteria. [Details of negotiations should be presented as well as use of a single BAFO. Also include initial term dates (start and end)]
3. The Evaluation Committee reviewed the BAFO response and agreed to move forward with the recommendation to award the contract to vendor as it represents the best value to the State.

# Section 9: Supporting Documentation

All supporting documentation will be provided to the Statewide IT Procurement Office, to include the following: [this is a suggested list and may be modified. You should include any documentation that supports your evaluation and award recommendation]

1. Evaluation Forms
2. Reference Questions and Answers
3. Meeting Minutes
4. Reference check documentation