**RFP Evaluation Instructions (adopted 6/15/2020)**

This workbook has two sets of spreadsheets to evaluate the Formal RFP. One set is protected in case you make an edit and wipe out the formulas. You can always copy the sheet and start over if needed. The second set is unprotected and ready for you to use.

**Tab 1 Vendor Qualification Eval**

After a proper proposal opening, the evaluation team will review the materials provided.

The vendor should circle their response, you just transfer their answer to this tally sheet.

Award points and track on this sheet for each vendor.

Enter name of each vendor

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  |  |  | VENDOR A | VENDOR B | VENDOR C |
|  |  |  | Local Louie | Organic Al | CT Cousins |
|  |  |  |  |  |  |
| **Farm/Food Safety** | Maximum | Response Score |  |  |  |
| Food Safety Plan (required) or Certification Equivalents: GAP/FSMA/Organic | 8 | YES 8 / NO 0 | 0 | 8 | 8 |
| Sustainable Farm Plan: Written plan = 8, parts of one 4 | 8 | 8 / 4 / 0 | 4 | 8 | 8 |

For Yes or No answers: Yes is awarded maximum points - 8 in the first line.

For range questions: A written full plan is awarded maximum points - 8 in the second.

If they indicate they have parts of a written plan, they are awarded 4 points.

If they have no written plan, they are awarded 0 points.

The vendor should circle their response, you just transfer their answer to this tally sheet.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Farm Average size 1-10 acres | 5 | Circle **ONE** to account for your farm size | 5 |  |  |
| 11-50 acres | 4 | Or the average of the farms you aggregate |  | 4 |  |
| 51-150 acres | 3 |  |  |  |  |
| More than 151 acres | 2 |  |  |  | 2 |

Farm size is only awarded one line and point value:

If they are a small farm, 1-10 acres in size, they are awarded 5 points.

If they are a large farm, more than 151 acres, they are awarded 2 points.

If they aggregate crops from several farms, the vendor should average the size of all farms.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Customer Service** |  |  |  |  |  |
| Proven customer service track record | 5 | Evaluators score the Narrative from Vendor | 4 | 5 | 2 |
| Dedicated responsive point of contact | 4 | Interactions with staff to date | 3 | 4 | 4 |

The vendors should have provided a narrative under the mandatory requirements and describe their business including other customers, institutions, references, or past history selling products. From this award points - If you have no questions about using them as a supplier from that narrative - award 5 points. Award less depending upon your tolerance for vendor risk.

Dedicated responsive point of contact - who has contacted you from the farm? Who is indicated as the contact on the response, how have your interaction been up to this point. If you have no questions about using them as a supplier from that narrative - award 4 points. Award less depending upon your tolerance for vendor risk.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **School Interaction** |  |  |  |  |  |
| Attend 2 school events to promote local | 10 | 2=10 / 1=5 / 0=0 | 10 | 5 | 0 |
| Host school field trips/tours | 8 | YES 8 / NO 0 | 8 | 0 | 0 |
| Host school events at farm | 5 | YES 5 / NO 0 | 5 | 5 | 0 |

As a school nutrition program you would value the vendor being at special days such as Maine Harvest Lunch or National Farm to School month. If they are making this commitment to attend, they are awarded points per visit. Two visits is awarded 10 points; One visit is awarded 5 points, no visits is 0 points.

As a school, it is valuable to have students experience the vendors that have their food in the cafeteria. Can the vendor host field trips and tours? Yes is awarded 8 points, No is 0.

As a school, it is valuable to have kitchen staff, teachers, PTA or other affiliated groups experience the vendors that have their food in the cafeteria. Can the vendor host field trips and tours? Yes is awarded 5 points, No is 0.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Miscellaneous** |  |  |  |  |  |
| Identify place of origin on each invoice If it is different from the farm address | 3 | YES 3 / NO 0 | 3 | 3 | 3 |
| Licensed for Light Processing | 5 | YES 5 / NO 0 | 0 | 0 | 0 |
| Owner/Operators of Color, Latinx, Immigrant, Native American, Female, Disadvantaged, GLBT, Veteran, Minority, Non Profit | 10 | YES 10 / NO 0 | 10 | 0 | 0 |

If vendors deliver food not grow on their farm, they should be indicating that on the invoice for your information and for traceability.

As a school it would be valuable if the vendor was licensed as a commercial kitchen so they could supply minimally processed foods to reduce kitchen labor.

As a federal institution, a preference for minority vendors is required.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Total Points this section** | **100** |  | **65** | **57** | **42** |
| **High Score WINS** |  |  | **VENDOR A** | **VENDOR B** | **VENDOR C** |
|  |  |  | Local Louie | Organic Al | CT Cousins |
| Vendor Qualifications - 35 points maximum toward award |  |  | **35.0** | **30.7** | **22.6** |
| (vendor score / winner score) \* 35 |  |  |  |  |  |

The sheet will tally the total points by vendor - always double check the calculations in case there have been wayward edits!!

The highest score wins all 35 points.

Each vendor is given points based on the winning total.

Vendor A wins with a score of 65/100: they are awarded 35 points.

Vendor B has a score of 57/100. To get the award total, divide the vendors score by the winners score and multiply that ratio by 35 (total possible).

Award = (57/65) \* 35 = 30.7 points for this section

Vendor C has a score of 42/100. To get the award total, divide the vendors score by the winners score and multiply that ratio by 35 (total possible).

Award = (42/65) \* 35 = 22.6 points for this section

These totals are linked to the Awards Tab.

**Tab 2 Price Adjustment**

**Price Adjustment and Evaluation - 65 points maximum toward award**

This tab evaluates the geographic preference and a bonus for the number of varieties of apples to be supplied by the vendor. Be careful working through this section. There are a number of manual entries to make.

Gather the RFP price sheet from the vendor packet, one vendor at a time.

|  |  |  |
| --- | --- | --- |
| **Vendor A** | Local Louie |  |
| **Fresh Apples** | **Cases** | **Weeks** |
| Cases per week 125 ct | 50 | 8 |
| Cases per week 140 ct | 25 | 6 |

Enter the vendor name

Enter the number of **Cases** and **Weeks** for each product from the RFP.

Do this only once and the additional vendor lines will be copied from this.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Vendor A** | Local Louie |  |  |  |
| **Fresh Apples** | **Cases** | **Weeks** | **Case Price** | **Total** |
| Cases per week 125 ct | 50 | 8 | $28.00 | $11,200.00 |
| Cases per week 140 ct | 25 | 6 | $24.00 | $3,600.00 |
| Average $/case |  |  | $26.91 |  |

Enter the vendor **Case Price** for each product.

The **Total** and **Average $/case** will be calculated for you.

|  |  |
| --- | --- |
| Number or Varieties | 5 |

Manually enter the number from the Vendor response.

|  |  |  |
| --- | --- | --- |
| Miles from District address to farm address = |  | 48 |

Using the same method for each vendor, calculate the distance from the vendor’s address to your point of reference. These should both be an address that you can plug into google, maps or other tools.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Discount | <50 miles | Maine | New England | USA |
|  | Ultra | Local | Regional | Other states |
|  |  |  |  |  |
| Average Price per pound | $0.67 | $0.67 | $0.67 | $0.67 |
| Standard Adjustment | Ultra Local -$0.10 | Local-$0.06 | Regional -$0.03 | Other-$0.00 |
| -Geographic Discount | $0.10 | $0.06 | $0.03 | 0 |
| **-Variety Discount** | **0.02** | **0.02** | **0.02** | **0.02** |
| Equals Adjusted Price | $0.55 | $0.59 | $0.62 | $0.65 |

Select which price discounts apply to this vendor depending upon the mileage figure.

Highlight this block to make it easier to double check.

The **Average Price per pound** is calculated based upon a 40 pound case of apples.

The **Standard Adjustment** ranges from Ultra to USA. If the vendor is not in New England, they would receive no Geographic Discount

If the vendor is less than 50 miles from your school like this example, they get the largest **Geographic Discount** of $0.10 per pound.

Manually enter the Variety Discount. From the RFP, if the vendor offers 1-4 varieties there is no discount; 5-9 varieties earns a $0.02 discount; 10+ varieties earns a $0.04 discount.

This gives you the Adjusted Price. Make sure to link this cell to the final line for the tally.

**REMEMBER THIS IS NOT THE PRICE YOU WILL BE PAYING - IT IS ONLY FOR EVALUATION OF PRICE IN THIS EVALUATION.**

Repeat for the other vendors. (If more than 3 vendors respond, copy the master to a new tab and continue.)

|  |  |  |  |
| --- | --- | --- | --- |
| **TOTAL POINTS THIS SECTION: 65** |  |  |  |
| Scale to 65 points | Local Louie | Organic Al | CT Cousins |
| Vendor Adjusted Price | $0.55 | $0.90 | $0.67 |
| Price Points | 65.0 | 39.9 | 53.6 |
| (WINNER score / VENDOR score) \* 65 |  |  |  |
| LOW PRICE WINS AND GETS THE MOST POINTS POSSIBLE = 65 |  |  |  |

Manually copy the **Vendor Adjusted Price** from each vendor above.

The LOW PRICE WINS.

The Lowest Price vendor is awarded 65 points.

Each vendor is given points based on the winning total.

Vendor A/Local Louie wins with the lowest adjusted price of $0.55: awarded 65 points.

Vendor B/Organic Al has an adjusted price of $0.90. To get the award total, divide the winners price by the vendors price and multiply that ratio by 65 (total possible).

Award = (.55/.90) \* 65 = 39.9 points for this section

Vendor C/CT Cousins has an adjusted price of $0.67. To get the award total, divide the winners price by the vendors price and multiply that ratio by 65 (total possible).

Award = (.55/.67) \* 65 = 53.6 points for this section

These totals are linked to the RFP Award Tab.

**Tab 3 RFP Award Tab**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| RFP AWARD |  | **Local Louie** | **Organic Al** | **CT Cousins** |
|  | Met all requirements? | Y / N | Y / N | Y / N |
| 35 points | Vendor Qualifications | 35.0 | 30.7 | 22.6 |
| 65 points | Price Adjustment | 65.0 | 39.9 | 53.6 |
| 100 points | **High Score WINS** | 100.0 | 70.6 | 76.2 |
|  | Average Case Price | $26.91 | $40.00 | $28.00 |
|  | **MAKE SURE YOU CAN AFFORD TO BUY AT THE OFFERED PRICE** |  |  |  |

As the Evaluation team, review the vendor response and determine if all mandatory requirements were met: documents requested were delivered.

These figures feed from the previous tabs. Double check the values are linked correctly.

High score wins the RFP.

If you are awarding to more than one vendor, know ahead of time how you will make that decision. In this case the second place vendor would be CT Cousins and would get the partial award.

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