

## Task Order Request for Proposals (TORFP) Assessment Criteria

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The Agency should have the records listed in the “Corresponding Records...” column available for review at the time of the assessment.

Assessment Criteria	What the Agency Should Demonstrate	Corresponding Records the Agency Should Retain
1) TORFP released to all Master Contractors (MC) in the designated Functional Area (FA)	<ul style="list-style-type: none"> <li>• TORFP was released to all MCs in the FA</li> </ul>	<ul style="list-style-type: none"> <li>• The outgoing email, including distribution list, releasing the TORFP</li> </ul>
2) Receipt of Proposals	<ul style="list-style-type: none"> <li>• TO Proposals received by due date and time</li> <li>• TO Proposals received late were rejected</li> </ul>	<ul style="list-style-type: none"> <li>• Emails transmitting TO Proposals, with date/time stamp</li> <li>• Proposal log</li> </ul>
3) Collect MC Feedback Forms	<ul style="list-style-type: none"> <li>• Forms received from MCs not proposing</li> </ul>	<ul style="list-style-type: none"> <li>• MC Feedback forms</li> </ul>
4) MBE Documentation Submitted with Proposal, if an MBE goal was established	<ul style="list-style-type: none"> <li>• MBE participation Forms D1 &amp; D2 or waiver documentation was submitted with proposal</li> </ul>	<ul style="list-style-type: none"> <li>• MBE participation forms D1 &amp; D2 or waiver documentation</li> </ul>
5) Evaluation of Proposals	<ul style="list-style-type: none"> <li>• TO Proposals were evaluated by an evaluation committee and the evaluation was appropriately documented</li> </ul>	<ul style="list-style-type: none"> <li>• Evaluation committee summary of proposal strengths and weaknesses</li> <li>• Award recommendation, rankings and rationale for selection</li> </ul>
6) Reference Checks	<ul style="list-style-type: none"> <li>• Reference checks performed for all proposals deemed reasonably susceptible for award</li> </ul>	<ul style="list-style-type: none"> <li>• Notes from evaluation committee reference checks</li> <li>• List of reference check questions</li> </ul>
7) Verification of Labor Rates, if a Time & Materials Task Order	<ul style="list-style-type: none"> <li>• Prices in the selected MC's Financial Proposal are equal to or less than the prices listed on the CATS II Master pricing forms</li> </ul>	<ul style="list-style-type: none"> <li>• Financial proposal of selected MC</li> <li>• CATS II Master pricing form for the selected MC</li> </ul>
8) TORFP Award Documentation	<ul style="list-style-type: none"> <li>• All required TORFP Award documentation is on file</li> </ul>	<ul style="list-style-type: none"> <li>• TORFP Award documentation on file includes:           <ul style="list-style-type: none"> <li>• Posted, signed purchase order</li> <li>• Executed TO Agreement</li> <li>• Notice to Proceed (or purchase order)</li> <li>• Selected MC (TO Contractor) submitted completed MBE Forms D3 and D4 or waiver documentation</li> <li>• Executed non-disclosure form</li> </ul> </li> </ul>
9) Debriefings	<ul style="list-style-type: none"> <li>• Debriefings were offered</li> <li>• If requested, debriefings were conducted</li> </ul>	<ul style="list-style-type: none"> <li>• Award announcement with debrief offer</li> <li>• Emails from MCs requesting debriefing</li> <li>• Debriefing dates and any documentation</li> </ul>