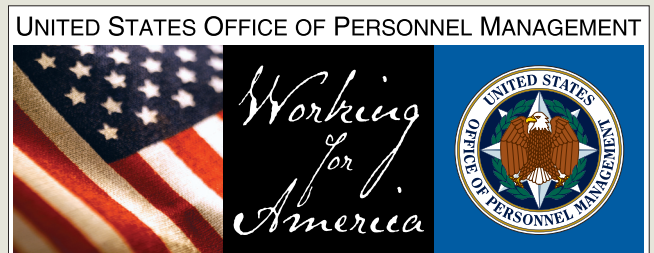




UNITED STATES OFFICE OF PERSONNEL MANAGEMENT

# MIGRATION PLANNING GUIDANCE ATTACHMENT G EVALUATION TEMPLATES

May 23, 2008



**HRLOB Migration Planning Guidance: << OFFEROR >> AGENCY Contract Office**

Team Member (Print name): \_\_\_\_\_ Signature \_\_\_\_\_ Date \_\_\_\_\_

**Evaluation Criteria Matrix - Corporate Capability and Past Performance Evaluation [Date: Month/Year]****Overview**

Offeror proposals will be evaluated in six overall factors

- Technical Capability and Approach
- Management Capability and Approach
- Functional Capability and Approach
- Corporate Capability and Past Performance
- Risk
- Price

The Price evaluation will be performed separately by the agency and is not covered by these evaluation matrices. The Risk evaluation will be performed for each of the first four (main) factors mentioned above using a separate evaluation matrix. The four main evaluation factors are broken down into sub-factors and elements for detailed analysis as appropriate. The following example illustrates this breakdown

Evaluation Factor: Corporate Capability and Past Performance

Evaluation Sub-factor: Provider Profile and Corporate Capability

Evaluation Element: Provider Profile

This evaluation matrix supports the factor of Corporate Capabilities & Past Performance and is divided into evaluation sub-factors and elements. Evaluators should take the following approach to evaluating Offeror responses using this matrix and the separate Risk Evaluation matrix:

- Evaluate the proposal response at the element level. See "How to complete the Corporate Capability and Past Performance Evaluation Matrix" below for additional instructions
- Determine a proposal evaluation rating for each sub-factor based on the sub-factor criteria. Evaluators should consider their element ratings and any other available information when rating the sub-factors. Evaluators must provide comments to substantiate their sub-factor ratings, particularly where the sub-factor rating differs markedly from the element ratings
- Input the Operational Capability Demonstration (OCD) rating for each element and sub-factor where applicable in the matrix below from the completed OCD Evaluation Form (see separate OCD Evaluation Form for instructions)
- Input the Final Rating in the matrix below based on the quality of the Offeror's proposal and their performance at the OCD (if applicable)

NOTE: Certain elements may not require evaluation in certain circumstances. For example, some elements may not be demonstrated as part of an OCD.

**Notice: Contains Source Selection Information – See FAR 2.101 and 3.104**

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### Team Primary Responsibilities Areas

There are a total of sixteen sub-factors that make up the evaluation criteria for the four main evaluation factors. The primary responsibility for these areas is as follows:

| Team                                      | Sub-factors  | Pages   |
|---|--|---|
| Technical Capability and Approach         | <ul style="list-style-type: none"> <li>• Architecture and Integration</li> <li>• Operational and Federal Security Standards</li> <li>• Hosting</li> <li>• Deployment Approach</li> <li>• Service and Support</li> <li>• Quality Control</li> </ul> | Evaluation Matrix – Technical (Tech Team) p. 5-31<br>Evaluation Matrix – Risk (Tech Team) p. 3-7        |
| Management Capability and Approach        | <ul style="list-style-type: none"> <li>• Project Management Approach</li> <li>• Earned Value Management</li> <li>• Compliance &amp; Management Constraints</li> </ul>  | Evaluation Matrix – Mgmt Cap (Mgmt Cap Team) p. 5-19<br>Evaluation Matrix – Risk (Mgmt Cap Team) p. 3-4 |
| Functional Capability and Approach        | <ul style="list-style-type: none"> <li>• Features and Functionality</li> <li>• Change Management</li> <li>• Training</li> <li>• Capability of the Solution</li> </ul>  | Evaluation Matrix – Functional (Func Team) p. 5-18<br>Evaluation Matrix – Risk (Func Team) p. 3-5       |
| Corporate Capability and Past Performance | <ul style="list-style-type: none"> <li>• Provider Profile &amp; Corporate Capability</li> <li>• Past Performance</li> <li>• Client References</li> </ul>   | Evaluation Matrix – Corp Cap p. 6-19<br>Evaluation Matrix – Risk (Corp Cap) p. 3-5                      |

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### How to complete the Corporate Capability and Past Performance Evaluation Matrix

Each proposal should be evaluated based on its own merits. In determining a proposal rating, evaluators should examine the Offeror's proposal and rate the Offeror's proposed solution based on the criteria listed in the matrix below in the column labeled "Element /Proposal Evaluation Criteria." Evaluators should circle their color rating in the column labeled "Proposal Review Rating" and input proposal strengths and weaknesses in the adjacent columns. The column labeled "OCD Rating" should be completed by evaluators after attending the Offeror OCD and completing the OCD Evaluation Form (a separate document). Evaluators should base their final rating for the Offeror on both their rating of the written proposal and the OCD, and should use the three-color evaluation scale listed in Table 1 below. Evaluators should circle the appropriate final rating in the column labeled "Final Rating" in the matrix below, and input supporting comments in the column labeled "Final Rating Comments":

**Table 1. Final Rating Scale**

| Color  | Final Rating      | Definition  |
|--------|-------------------|---|
| GREEN  | Acceptable        | Offeror and/or subcontractor corporate capabilities and past performance are acceptable to perform work for the Federal agency as an HR LOB SSC.  |
| YELLOW | Needs Improvement | Offeror and/or subcontractor corporate capabilities have some deficiencies that will need to be remediated and performance needs to improve in order to become acceptable. Offeror's approach or solution will need improvement prior to migration. |
| RED    | Unacceptable      | Offeror and/or subcontractor corporate capabilities and/or past performance are unacceptable.   |

For elements rated anything other than a Green, evaluators must provide appropriate explanatory comments in the "Proposal Weaknesses" or the "Final Rating Comments" column of the Evaluation Matrix. The evaluator's comments should reflect the rationale for assigning the particular rating. Additionally, evaluators are encouraged to note relevant strengths and weaknesses of the Offeror's proposal that were important in assigning the selected rating. When assigning a Yellow or Orange rating, the evaluator must specify specific deficiencies to facilitate follow-up with the Offeror.

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The following table defines each column in the Evaluation Matrix:

| Column                                 | Definition   |
|--|--|
| Sub-factor                             | Top level evaluation criteria upon which selection of Offeror will be based.   |
| Element / Proposal Evaluation Criteria | Provides guidance for determining evaluation ratings for proposal elements.  |
| Proposal Review Rating                 | The evaluation rating (color) assigned to each sub-factor and element as a result of the proposal review.                                |
| Proposal Strengths                     | Aspects of the proposal that clearly and quantifiably exceed the standard for the sub-factor or element.                                 |
| Proposal Weaknesses                    | Aspects of the proposal that clearly and quantifiably fail to meet the standard for the sub-factor or element.                           |
| OCD Rating                             | The OCD evaluation rating (color) assigned to each sub-factor and element from the completed OCD Evaluation Form.                        |
| Final Rating                           | Final evaluation rating (color) assigned to each sub-factor and element based on the quality of the proposal and performance at the OCD. |
| Final Rating Comments                  | Rationale to support final rating.   |

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Given the nature of past performance references, a separate rating system is employed for evaluating the Client References sub-factor and elements. The ratings for prime and subcontractor references are as follows:

| Past Performance Rating | Definition  |
|-------------------------|---|
| Exceptional             | Based on the Offeror's performance record, essentially no doubt exists that the Offeror will successfully perform the required effort.  |
| Very Good               | Based on the Offeror's performance record, little doubt exists that the Offeror will successfully perform the required effort.  |
| Satisfactory            | Based on the Offeror's performance record, some doubt exists that the Offeror will successfully perform the required effort.  |
| Neutral                 | No performance record identifiable.*  |
| Marginal                | Based on the Offeror's performance record, substantial doubt exists that the Offeror will successfully perform the required effort. Changes to the Offeror's existing processes may be necessary in order to achieve contract requirements. |
| Unsatisfactory          | Based on the Offeror's performance record, extreme doubt exists that the Offeror will successfully perform the required effort.   |

\* Evaluators should consider the equivalence of the referenced experience, such as whether the work described is of equal complexity, scale or scope of the work they are proposing. If the references are from work that is not equivalent, the Offeror should receive no higher than a neutral rating for this reference.



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| Sub-factor   | Element / Proposal Evaluation Criteria  | Proposal Review Rating<br>(Circle One)  | Proposal Strengths | Proposal Weaknesses | OCD Rating<br>(From OCD Evaluation Form)                                    | Final Rating<br>(see Table 1)<br>(Circle One)              | Final Rating Comments |
|--|---|---|--------------------|---------------------|---|--|-----------------------|
| <b>CORPORATE CAPABILITY &amp; PAST PERFORMANCE</b> |   |   |                    |                     |   |  |                       |
|  | <p><b>1. PROVIDER PROFILE &amp; CORPORATE CAPABILITY (Overall)</b></p> <p><b>GREEN</b> – Offeror’s corporate capabilities and past performance are acceptable to perform work for the Federal agency as an HR LOB SSC. The Offeror provides the following information</p> <ul style="list-style-type: none"> <li>▪ An overview of the proposed Offeror</li> <li>▪ Description of the proposed Offeror’s capabilities and experience providing services similar to those requested in the agency SOO (Section ##)</li> <li>▪ Past performance references for the proposed Offeror</li> <li>▪ Proposed subcontractors</li> </ul> <p><b>YELLOW</b> – Offeror’s corporate capabilities (or those of subcontractors) have some deficiencies that will need to be remediated and performance needs to improve in order to become acceptable. Offeror’s approach or solution will need improvement prior to migration.</p> <p><b>ORANGE</b>– Offeror has provided insufficient provider profile and corporate capability information. Additional information is needed from the Offeror and/or client references to fully assess this item.</p> <p><b>RED</b> – Offeror’s corporate capabilities and/or past performance are unacceptable.</p> | <p><b>GREEN</b></p> <p><b>YELLOW</b></p> <p><b>ORANGE</b></p> <p><b>RED</b></p> |                    |                     | <p><b>GREEN</b></p> <p><b>YELLOW</b></p> <p><b>RED</b></p> <p><b>NR</b></p> | <p><b>GREEN</b></p> <p><b>YELLOW</b></p> <p><b>RED</b></p> |                       |
| <p>Provider Profile and Corporate Capability</p>   | <p><b>c.3.A – Provider Profile</b> RFP p. ##</p> <p><b>GREEN</b> – The proposed Offeror provides acceptable information on its overall status of business including that of all proposed subcontractors. Each profile contains the following</p> <ul style="list-style-type: none"> <li>▪ Company name and the names of business units that possess the experience and capabilities required</li> <li>▪ Company ownership and nationality</li> <li>▪ Offeror size in terms of average annual gross receipts over the past three years</li> <li>▪ Liability insurance and performance</li> </ul>   | <p><b>GREEN</b></p> <p><b>YELLOW</b></p> <p><b>ORANGE</b></p> <p><b>RED</b></p> |                    |                     | <p><b>GREEN</b></p> <p><b>YELLOW</b></p> <p><b>RED</b></p> <p><b>NR</b></p> |  |                       |

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| Sub-factor                                       | Element / Proposal Evaluation Criteria  | Proposal Review Rating<br>(Circle One)  | Proposal Strengths | Proposal Weaknesses | OCD Rating<br>(From OCD Evaluation Form)                                    | Final Rating<br>(see Table 1)<br>(Circle One) | Final Rating Comments |
|--|---|---|--------------------|---------------------|---|---|-----------------------|
|  | <p>bonding carried by the company Audited financial statements (income statement balance sheet, statement of cash flows on an annual basis for the past three years through the current year). All financial data must be audited by an independent Certified Public Accountant</p> <p><b>YELLOW</b> – Offeror’s provider profile has some deficiencies that will need to be remediated and performance needs to improve in order to become acceptable. Offeror’s approach or solution will need improvement prior to migration.</p> <p><b>ORANGE</b> – Offeror has provided insufficient provider profile information. Additional information is needed from the Offeror and/or client references to fully assess this item.</p> <p><b>RED</b> – Offeror’s provider profile is unacceptable.</p>           |   |                    |                     |   |   |                       |
| <p>Provider Profile and Corporate Capability</p> | <p><b>c.3.A – Provider Profile (con’t.) – Contact and Small Business Information</b><br/>RFP p. ###</p> <p><b>GREEN</b> – Offeror adequately provides point of contact for purposes of communicating with the Agency about the RFP, including contact name, title, postal address, telephone number and email address. Indication of whether the provider, and individual team members, qualifies as one or more of the following entities for purposes of contracting with the Federal Government: Large Business, Small Business, 8(a) Firm, Small Disadvantaged Business, HubZone Business, Service Disabled Veteran-Owned Small Business, or Woman Owned Business.</p> <p><b>YELLOW</b> – Offeror’s provider profile has some deficiencies that will need to be remediated and performance needs to</p> | <p><b>GREEN</b></p> <p><b>YELLOW</b></p> <p><b>ORANGE</b></p> <p><b>RED</b></p> |                    |                     | <p><b>GREEN</b></p> <p><b>YELLOW</b></p> <p><b>RED</b></p> <p><b>NR</b></p> |   |                       |



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| Sub-factor                                       | Element / Proposal Evaluation Criteria   | Proposal Review Rating<br>(Circle One)  | Proposal Strengths | Proposal Weaknesses | OCD Rating<br>(From OCD Evaluation Form)                                    | Final Rating<br>(see Table 1)<br>(Circle One) | Final Rating Comments |
|--|--|---|--------------------|---------------------|---|---|-----------------------|
|  | <p>improve in order to become acceptable. Offeror's approach or solution will need improvement prior to migration.</p> <p><b>ORANGE</b> – Offeror has provided insufficient provider profile information. Additional information is needed from the Offeror and/or client references to fully assess this item.</p> <p><b>RED</b> – Offeror's provider profile is unacceptable.</p>  |   |                    |                     |   |   |                       |
| <p>Provider Profile and Corporate Capability</p> | <p><b>c.3.B – Capabilities and Experience of Offeror – Capabilities</b><br/>RFP p. ##</p> <p><b>GREEN</b> – The proposed Offeror adequately describes its capabilities and experience providing human resource information technology solutions similar to that requested in the agency's Statement of Objectives (SOO).</p> <p>The description should include:</p> <ul style="list-style-type: none"> <li>- The history of the business processes and systems that the Offeror is proposing to support the functions required in the agency's SOO                             <ul style="list-style-type: none"> <li>▪ the age of the system</li> <li>▪ the length of time the system has supported each of the "Core" and "Non-core" functions listed in the Agency's SOO</li> <li>▪ the steps taken to maintain the underlying technology at a level consistent with the mainstream of information technology</li> </ul> </li> <li>- The firm's overall market position and strategy relative to other HR service providers</li> </ul> <p>If provided, the Offeror adequately describes its historical experience in applying business processes and systems to</p> | <p><b>GREEN</b></p> <p><b>YELLOW</b></p> <p><b>ORANGE</b></p> <p><b>RED</b></p> |                    |                     | <p><b>GREEN</b></p> <p><b>YELLOW</b></p> <p><b>RED</b></p> <p><b>NR</b></p> |   |                       |

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| Sub-factor                                       | Element / Proposal Evaluation Criteria  | Proposal Review Rating<br>(Circle One)  | Proposal Strengths | Proposal Weaknesses | OCD Rating<br>(From OCD Evaluation Form)                                    | Final Rating<br>(see Table 1)<br>(Circle One) | Final Rating Comments |
|--|---|---|--------------------|---------------------|---|---|-----------------------|
|  | <p>HR systems where those processes and systems are different than those proposed for the agency, however, this distinction must be noted wherever it applies (Optional).</p> <ul style="list-style-type: none"> <li>The established processes and systems that it uses to measure performance, service quality and customer service levels</li> <li>The Offeror must describe its processes that measure service quality including supporting data collected as part of an ongoing measurement program</li> </ul> <p><b>YELLOW</b> – Offeror’s capabilities (or those of its subcontractors) have some deficiencies that will need to be remediated and/or performance needs to improve in order to become acceptable. Offeror’s approach or solution will need improvement prior to migration.</p> <p><b>ORANGE</b> – Offeror has provided insufficient capability information. Additional information is needed from the Offeror and/or client references to fully assess this item.</p> <p><b>RED</b> – Offeror’s capabilities (or those of its subcontractors) are unacceptable.</p> |   |                    |                     |   |   |                       |
| <p>Provider Profile and Corporate Capability</p> | <p><b>c.3.B – Capabilities and Experience of Offeror – Experience</b><br/>RFP p. ###</p> <p><b>GREEN</b> – The Offeror provides an acceptable narrative of experience in providing HR LOB Services comparable to those listed in each of the “Core” and “Non-core” functions listed in the agency’s SOO. At a minimum, the narrative covers:</p> <ul style="list-style-type: none"> <li>Demonstrate that the Offeror has a minimum of three (3) years of relevant experience</li> <li>Qualifications, staff, and contractor resources</li> <li>Understanding and experience with</li> </ul>   | <p><b>GREEN</b></p> <p><b>YELLOW</b></p> <p><b>ORANGE</b></p> <p><b>RED</b></p> |                    |                     | <p><b>GREEN</b></p> <p><b>YELLOW</b></p> <p><b>RED</b></p> <p><b>NR</b></p> |   |                       |

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| Sub-factor | Element / Proposal Evaluation Criteria   | Proposal Review Rating<br>(Circle One) | Proposal Strengths | Proposal Weaknesses | OCD Rating<br>(From OCD Evaluation Form) | Final Rating<br>(see Table 1)<br>(Circle One) | Final Rating Comments |
|------------|--|--|--------------------|---------------------|--|---|-----------------------|
|            | <p>agency processes and directives</p> <ul style="list-style-type: none"> <li>▪ Indicate the number of projects per year and scope of projects/work, etc.</li> <li>▪ The number of clients served</li> <li>▪ The number of customer organizations served</li> <li>▪ A description of the size, in terms of accounts maintained, of the five largest customer organizations served, type of service (e.g. outsourcing vs. co-sourcing or licensed technology) and period of time serviced</li> <li>▪ The number of years the organization has offered services in each of the "Core" and "Non-core" functions listed in the SOO</li> <li>▪ Describe the Offeror's experience in cross-servicing and performing migration for diverse client agencies</li> <li>▪ The level of complexity addressed in meeting customer needs</li> </ul> <p>The Offeror also provides a copy of its standard, commercial Service Level Agreement for hosted, HR information systems services. The agency expects that the proposed quality levels in the Offeror's response will be equal or better than those offered to the Offeror's other customers.</p> <p><b>YELLOW</b> – Offeror's experience (or that of its subcontractors) has some deficiencies that will need to be remediated and/or performance needs to improve in order to become acceptable. Offeror's approach or solution will need improvement prior to migration.</p> <p><b>ORANGE</b> – Offeror has provided insufficient experience information. Additional information is needed from the Offeror and/or client references to fully assess this item.</p> |  |                    |                     |  |   |                       |

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| Sub-factor                                       | Element / Proposal Evaluation Criteria   | Proposal Review Rating<br>(Circle One)  | Proposal Strengths | Proposal Weaknesses | OCD Rating<br>(From OCD Evaluation Form)                                    | Final Rating<br>(see Table 1)<br>(Circle One)              | Final Rating Comments |
|--|--|---|--------------------|---------------------|---|--|-----------------------|
|  | <p><b>RED</b> – Offeror’s experience (or those of its subcontractors) is unacceptable.</p>   |   |                    |                     |   |  |                       |
| <p>Provider Profile and Corporate Capability</p> | <p><b>c.3.B.1 – Subcontractors</b><br/>RFP p. ##</p> <p><b>GREEN</b> – The Offeror specifies whether they will subcontract with another organization to provide services to satisfy the requirements of this Request for Proposal (RFP), what the status of those relationships are (ongoing, in the works, intent), and the status of the business process and system integration for all systems involved. In addition, the Offeror identifies any subcontractors that are expected to perform the majority of the work in a given HR functional area.</p> <p><b>YELLOW</b> – Offeror’s subcontractor information has some deficiencies that will need to be remediated and/or performance needs to improve in order to become acceptable. Offeror’s approach or solution will need improvement prior to migration.</p> <p><b>ORANGE</b> – Offeror has provided insufficient subcontractor information. Additional information is needed from the Offeror and/or client references to fully assess this item.</p> <p><b>RED</b> – Offeror’s subcontractor information is unacceptable.</p> | <p><b>GREEN</b></p> <p><b>YELLOW</b></p> <p><b>ORANGE</b></p> <p><b>RED</b></p> |                    |                     | <p><b>GREEN</b></p> <p><b>YELLOW</b></p> <p><b>RED</b></p> <p><b>NR</b></p> |  |                       |
| <b>PAST PERFORMANCE</b>                          |  |   |                    |                     |   |  |                       |
|  | <p><b>2. PAST PERFORMANCE</b></p> <p><b>GREEN</b> – Offeror’s past performance is acceptable to perform work for the Federal agency as an HR LOB SSC.</p> <p><b>YELLOW</b> – Offeror’s performance needs to improve in order to become acceptable. Offeror’s approach or solution will need improvement prior to migration.</p> <p><b>ORANGE</b> – Offeror has provided insufficient past performance information. Additional information is needed from the Offeror and/or client references to fully assess this item.</p>   | <p><b>GREEN</b></p> <p><b>YELLOW</b></p> <p><b>ORANGE</b></p> <p><b>RED</b></p> |                    |                     | <p><b>GREEN</b></p> <p><b>YELLOW</b></p> <p><b>RED</b></p> <p><b>NR</b></p> | <p><b>GREEN</b></p> <p><b>YELLOW</b></p> <p><b>RED</b></p> |                       |

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| Sub-factor       | Element / Proposal Evaluation Criteria  | Proposal Review Rating<br>(Circle One)  | Proposal Strengths | Proposal Weaknesses | OCD Rating<br>(From OCD Evaluation Form)                                    | Final Rating<br>(see Table 1)<br>(Circle One) | Final Rating Comments |
|------------------|---|---|--------------------|---------------------|---|---|-----------------------|
| <b>RED</b>       | Offeror's past performance is unacceptable and will not meet Federal agency standards.  |   |                    |                     |   |   |                       |
| Past Performance | <p><b>c.3.C.3 – Past Performance Metrics and Audits</b><br/>RFP p. ##</p> <p><b>GREEN</b> – The Offeror adequately discusses its current measures and metrics in place with its customers, how the Offeror uses these metrics to improve performance, and how the Offeror plans to address future requirements. The Offeror also discusses weaknesses identified in the Offeror's latest service delivery audits (i.e., internal audits, third party audits, etc.) and how the Offeror plans to address those weaknesses and vulnerabilities. The Offeror may provide information on problems encountered during the performance of the contract(s)/subcontract(s) and corrective actions taken on the identified contracts and subcontracts.</p> <p><b>YELLOW</b> – Offeror's past performance (or that of its subcontractors) has some deficiencies that will need to be remediated and/or performance needs to improve in order to become acceptable. Offeror's approach or solution will need improvement prior to migration.</p> <p><b>ORANGE</b> – Offeror has provided insufficient past performance information. Additional information is needed from the Offeror and/or client references to fully assess this item.</p> <p><b>RED</b> – Offeror's past performance (or those of its subcontractors) is unacceptable.</p> | <p><b>GREEN</b></p> <p><b>YELLOW</b></p> <p><b>ORANGE</b></p> <p><b>RED</b></p> |                    |                     | <p><b>GREEN</b></p> <p><b>YELLOW</b></p> <p><b>RED</b></p> <p><b>NR</b></p> |   |                       |
| Past Performance | <p><b>c.3.C.4 – Enterprise Resource Planning (ERP) Solution</b><br/>RFP p. ##</p> <p><b>GREEN</b> –If the Offeror uses a Commercial off the Shelf (COTS) ERP solution, the Offeror adequately discusses the modules of the ERP solution that the Offeror provides or</p>  | <p><b>GREEN</b></p> <p><b>YELLOW</b></p> <p><b>ORANGE</b></p> <p><b>RED</b></p> |                    |                     | <p><b>GREEN</b></p> <p><b>YELLOW</b></p> <p><b>RED</b></p> <p><b>NR</b></p> |   |                       |

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| Sub-factor       | Element / Proposal Evaluation Criteria  | Proposal Review Rating<br>(Circle One)  | Proposal Strengths | Proposal Weaknesses | OCD Rating<br>(From OCD Evaluation Form)                                    | Final Rating<br>(see Table 1)<br>(Circle One) | Final Rating Comments |
|------------------|---|---|--------------------|---------------------|---|---|-----------------------|
|                  | <p>proposes to provide. If the Offeror does not use all of the offered modules, the Offeror explains why not. The Offeror adequately discusses whether it uses or proposes to use other point solutions in lieu of some delivered ERP modules and if so, why.</p> <p><b>YELLOW</b> – Offeror’s ERP Solution (or that of its subcontractors) has some deficiencies that will need to be remediated and/or performance needs to improve in order to become acceptable. Offeror’s approach or solution will need improvement prior to migration.</p> <p><b>ORANGE</b>– Offeror has provided insufficient ERP Solution information. Additional information is needed from the Offeror and/or client references to fully assess this item.</p> <p><b>RED</b> – Offeror’s ERP Solution (or that of its subcontractors) is unacceptable.</p>   |   |                    |                     |   |   |                       |
| Past Performance | <p><b>c.3.C.5 – Extent of Customization</b><br/>RFP p. ##</p> <p><b>GREEN</b> – If offering a Commercial off the Shelf (COTS)/Government off the Shelf (GOTS) solution, the Offeror adequately describes the extent to which its system will be customized or modified from the base COTS/GOTS. The Offeror also discusses its ability to implement statutory/regulatory policy changes.</p> <p><b>YELLOW</b> – Offeror’s extent of customization (or that of its subcontractors) has some deficiencies that will need to be remediated and/or performance needs to improve in order to become acceptable. Offeror’s approach or solution will need improvement prior to migration.</p> <p><b>ORANGE</b> – Offeror has provided insufficient customization information. Additional information is needed from the Offeror and/or client references to fully assess this item.</p> <p><b>RED</b> – Offeror’s extent of customization (or</p> | <p><b>GREEN</b></p> <p><b>YELLOW</b></p> <p><b>ORANGE</b></p> <p><b>RED</b></p> |                    |                     | <p><b>GREEN</b></p> <p><b>YELLOW</b></p> <p><b>RED</b></p> <p><b>NR</b></p> |   |                       |



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| Sub-factor       | Element / Proposal Evaluation Criteria  | Proposal Review Rating (Circle One)   | Proposal Strengths | Proposal Weaknesses | OCD Rating (From OCD Evaluation Form)                                       | Final Rating (see Table 1) (Circle One) | Final Rating Comments |
|------------------|---|---|--------------------|---------------------|---|---|-----------------------|
|                  | that of its subcontractors) is unacceptable.  |   |                    |                     |   |   |                       |
| Past Performance | <p><b>c.3.C.6 – Interface Experience</b><br/>RFP p. ##</p> <p><b>GREEN</b> – The Offeror adequately describes its experience and an acceptable approach to interfacing with external systems, including front-end and back-end feeds to financial, payroll, and management information systems. The Offeror also adequately identifies any supported self-service systems (i.e., Employee Express, Employee Verification System (TALX), etc.).</p> <p><b>YELLOW</b> – Offeror's interface experience (or that of its subcontractors) has some deficiencies that will need to be remediated and/or performance needs to improve in order to become acceptable. Offeror's approach or solution will need improvement prior to migration.</p> <p><b>ORANGE</b> – Offeror has provided insufficient interface experience information. Additional information is needed from the Offeror and/or client references to fully assess this item.</p> <p><b>RED</b> – Offeror's interface experience (or that of its subcontractors) is unacceptable.</p> | <p><b>GREEN</b></p> <p><b>YELLOW</b></p> <p><b>ORANGE</b></p> <p><b>RED</b></p> |                    |                     | <p><b>GREEN</b></p> <p><b>YELLOW</b></p> <p><b>RED</b></p> <p><b>NR</b></p> |   |                       |
| Past Performance | <p><b>c.3.C.7 – Telecommunications</b><br/>RFP p. 131</p> <p><b>GREEN</b> – The Offeror adequately discusses how its telecommunications environment and internet capability supports its current service delivery mechanism.</p> <p><b>YELLOW</b> – Offeror's telecommunications (or that of its subcontractors) has some deficiencies that will need to be remediated and/or performance needs to improve in order to become acceptable. Offeror's approach or solution will need improvement prior to migration.</p> <p><b>ORANGE</b> – Offeror has provided insufficient telecommunications information. Additional information is needed from the Offeror</p>   | <p><b>GREEN</b></p> <p><b>YELLOW</b></p> <p><b>ORANGE</b></p> <p><b>RED</b></p> |                    |                     | <p><b>GREEN</b></p> <p><b>YELLOW</b></p> <p><b>RED</b></p> <p><b>NR</b></p> |   |                       |

**HRLOB Migration Planning Guidance: << OFFEROR >> AGENCY Contract Office**

| Sub-factor       | Element / Proposal Evaluation Criteria   | Proposal Review Rating<br>(Circle One)  | Proposal Strengths | Proposal Weaknesses | OCD Rating<br>(From OCD Evaluation Form)                                    | Final Rating<br>(see Table 1)<br>(Circle One) | Final Rating Comments |
|------------------|--|---|--------------------|---------------------|---|---|-----------------------|
|                  | and/or client references to fully assess this item.<br><b>RED</b> – Offeror’s telecommunications (or that of its subcontractors) is unacceptable.  |   |                    |                     |   |   |                       |
| Past Performance | <p><b>c.3.C.8 – Subcontractors</b><br/>RFP p. ##</p> <p><b>GREEN</b> – The Offeror adequately provides the following information: to the extent that the Offeror intends to subcontract work required to meet the objectives in the SOO, the Offeror must provide a list of proposed subcontractors and a description of each proposed subcontractor’s role and qualifications in delivering, operating and maintaining the system solution or providing services. The Offeror must describe their prior experience working with each subcontractor on HR solutions similar to that described in the SOO. The Offeror must describe the rationale for selecting the proposed subcontractors. The Offeror must include descriptions of the types of work that will be performed by each subcontractor, and explain how the services provided by the Offeror’s team will be managed.</p> <p><b>YELLOW</b> – Offeror’s subcontractors have some deficiencies that will need to be remediated and/or performance needs to improve in order to become acceptable. Offeror’s approach or solution will need improvement prior to migration.</p> <p><b>ORANGE</b> – Offeror has provided insufficient past subcontractor information. Additional information is needed from the Offeror and/or client references to fully assess this item.</p> <p><b>RED</b> – Offeror’s subcontractors are unacceptable</p> | <p><b>GREEN</b></p> <p><b>YELLOW</b></p> <p><b>ORANGE</b></p> <p><b>RED</b></p> |                    |                     | <p><b>GREEN</b></p> <p><b>YELLOW</b></p> <p><b>RED</b></p> <p><b>NR</b></p> |   |                       |
| Past Performance | <p><b>c.3.C.9– EVMS</b><br/>RFP p. ##</p> <p><b>GREEN</b> – The Offeror adequately discusses</p>   | <p><b>GREEN</b></p> <p><b>YELLOW</b></p>  |                    |                     | <p><b>GREEN</b></p> <p><b>YELLOW</b></p>                                    |   |                       |

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| Sub-factor               | Element / Proposal Evaluation Criteria   | Proposal Review Rating (Circle One)  | Proposal Strengths | Proposal Weaknesses | OCD Rating (From OCD Evaluation Form)                            | Final Rating (see Table 1) (Circle One)  | Final Rating Comments |
|--------------------------|--|--|--------------------|---------------------|--|--|-----------------------|
|                          | its experience utilizing Earned Value Management System (EVMS) techniques to assess, quantify, and forecast trends, analyze variances, and facilitate development.<br><b>YELLOW</b> – Offeror's EVMS (or that of its subcontractors) has some deficiencies that will need to be remediated and/or performance needs to improve in order to become acceptable. Offeror's approach or solution will need improvement prior to migration.<br><b>ORANGE</b> – Offeror has provided insufficient EVMS information. Additional information is needed from the Offeror and/or client references to fully assess this item.<br><b>RED</b> – Offeror's EVMS (or that of its subcontractors) is unacceptable   | <p align="center"><b>ORANGE</b></p> <p align="center"><b>RED</b></p>   |                    |                     | <p align="center"><b>RED</b></p> <p align="center"><b>NR</b></p> |  |                       |
| <b>CLIENT REFERENCES</b> |  |  |                    |                     |  |  |                       |
|                          | <p align="center"><b>3. CLIENT REFERENCES</b></p> <p><b>Exceptional/High Confidence</b> – Based on the Offeror's performance record, essentially no doubt exists that the Offeror will successfully perform the required effort</p> <p><b>Very Good/Significant Confidence</b> – Based on the Offeror's performance record, little doubt exists that the Offeror will successfully perform the required effort</p> <p><b>Satisfactory/Confidence</b> – Based on the Offeror's performance record, some doubt exists that the Offeror will successfully perform the required effort</p> <p><b>Neutral/Unknown Confidence</b> – No performance record identifiable</p> <p><b>Marginal/Little Confidence</b> – Based on the Offeror's performance record, substantial doubt exists that the Offeror will successfully perform the required effort. Changes to the Offeror's existing processes may be necessary in order to achieve contract requirements</p> <p><b>Unsatisfactory/No Confidence</b> – Based on the Offeror's performance record, extreme doubt exists that the Offeror will successfully perform the required effort</p> | <p align="center"><b>Exceptional</b></p> <p align="center"><b>Very Good</b></p> <p align="center"><b>Satisfactory</b></p> <p align="center"><b>Neutral</b></p> <p align="center"><b>Marginal</b></p> <p align="center"><b>Unsatisfactory</b></p> |                    |                     | <p align="center"><b>NR</b></p>                                  | <p align="center"><b>Exceptional</b></p> <p align="center"><b>Very Good</b></p> <p align="center"><b>Satisfactory</b></p> <p align="center"><b>Neutral</b></p> <p align="center"><b>Marginal</b></p> <p align="center"><b>Unsatisfactory</b></p> |                       |
|                          |  |  |                    |                     |  |  |                       |

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| Sub-factor        | Element / Proposal Evaluation Criteria  | Proposal Review Rating<br>(Circle One)   | Proposal Strengths | Proposal Weaknesses | OCD Rating<br>(From OCD Evaluation Form) | Final Rating<br>(see Table 1)<br>(Circle One) | Final Rating Comments |
|-------------------|---|--|--------------------|---------------------|--|---|-----------------------|
| Client References | <p><b>c.3.B.2 List of References</b><br/>RFP p. ##</p> <p><b>GREEN</b> - The Offeror and each major subcontractor provides a list of references for all on-going contracts, and contracts completed not more than three (3) years prior to the date of release of this solicitation. The references provided demonstrate performance relevant to the requirements specified in this solicitation.</p> <p><b>YELLOW</b> – Offeror’s list of references (or that of its subcontractors) has some deficiencies that will need to be remediated and/or performance needs to improve in order to become acceptable. Offeror’s approach or solution will need improvement prior to migration.</p> <p><b>ORANGE</b> – Offeror has provided insufficient reference information. Additional information is needed from the Offeror and/or client references to fully assess this item.</p> <p><b>RED</b> – Offeror’s references (or those of its subcontractors) is unacceptable</p> | <p><b>GREEN</b></p> <p><b>YELLOW</b></p> <p><b>ORANGE</b></p> <p><b>RED</b></p>  |                    |                     |  |   |                       |
| Client References | <p><b>c.3.C.1 Past Performance References (Offeror)</b><br/>RFP p. ##</p> <p>At least 5, but no more than 10 of the following references</p> <ul style="list-style-type: none"> <li>• Name of the customer or contracting organization</li> <li>• Contract type and value</li> <li>• Original contract dollar value and current or actual dollar value</li> <li>• Designation as prime or subcontractor</li> <li>• Period of performance</li> <li>• Customer point of contact or reference having knowledge of contract performance (name, title, telephone number, e-mail address)</li> </ul>  | <p><b>Exceptional</b></p> <p><b>Very Good</b></p> <p><b>Satisfactory</b></p> <p><b>Neutral</b></p> <p><b>Marginal</b></p> <p><b>Unsatisfactory</b></p> |                    |                     |  |   |                       |

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| Sub-factor        | Element / Proposal Evaluation Criteria   | Proposal Review Rating<br>(Circle One)   | Proposal Strengths | Proposal Weaknesses | OCD Rating<br>(From OCD Evaluation Form) | Final Rating<br>(see Table 1)<br>(Circle One) | Final Rating Comments |
|-------------------|--|--|--------------------|---------------------|--|---|-----------------------|
|                   | <ul style="list-style-type: none"> <li>Description of work performed, including a statement of the similarities of the work and the proportion of the work performed to that of the services described in the SOO. Each reference description must identify which of the "Core" and "Non-core" HR functional areas listed in the SOO is being substantiated.</li> <li>Completion date</li> <li>List of significant subcontractors</li> <li>Number of clients managed, average size of populations services, and period of time the Offeror has provided HR services to the customer.</li> </ul>  |  |                    |                     |  |   |                       |
| Client References | <p><b>c.3.C.1 Past Performance References (Subcontractor)</b><br/>RFP p. ###</p> <p>All major subcontractors listed in section (c.3.B.2) should provide a list of at least five agreements for customers for whom they performed work of a similar nature to that which they are proposed to perform under this contract.</p> <ul style="list-style-type: none"> <li>Name of the customer or contracting organization</li> <li>Contract type and value</li> <li>Original contract dollar value and current or actual dollar value</li> <li>Designation as prime or subcontractor</li> <li>Period of performance</li> <li>Customer point of contact or reference having knowledge of contract performance (name, title, telephone number, e-mail address)</li> <li>Description of work performed, including a statement of the similarities of the work and the proportion of the work performed</li> </ul> | <p><b>Exceptional</b></p> <p><b>Very Good</b></p> <p><b>Satisfactory</b></p> <p><b>Neutral</b></p> <p><b>Marginal</b></p> <p><b>Unsatisfactory</b></p> |                    |                     |  |   |                       |

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|------------|---|--|--------------------|---------------------|--|---|-----------------------|
|            | <p>to that of the services described in the SOO. Each reference description must identify which of the "Core" and "Non-core" HR functional areas listed in the SOO is being substantiated.</p> <ul style="list-style-type: none"> <li>• Completion date</li> <li>• List of significant subcontractors</li> <li>• Number of clients managed, average size of populations services, and period of time the Offeror has provided HR services to the customer.</li> </ul> |  |                    |                     |  |   |                       |





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