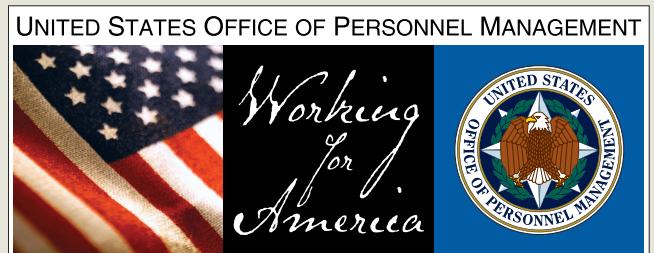




UNITED STATES OFFICE OF PERSONNEL MANAGEMENT

MIGRATION PLANNING GUIDANCE ATTACHMENT G EVALUATION TEMPLATES

May 23, 2008



HRLOB Migration Planning Guidance: << OFFEROR >> – Agency Contract Office

TEP Member (Print name): _____ Signature _____ Date _____

Corporate Capability & Past Performance Evaluation Criteria Risk Matrix [Date: Month/Year]

This risk evaluation matrix is divided into evaluation sub-factors and elements. Evaluators should use this matrix in conjunction with the Corporate Capability & Past Performance Evaluation matrix, as follows:

1. Evaluate the risk level of the corporate capability and past performance response at the element level.
2. Determine an overall risk level for each sub-factor based on the sub-factor criteria. Evaluators should consider their proposal and Operational Capability Demonstration (OCD) ratings for the underlying elements, and any other relevant information, when determining the risk rating for the sub-factors. Evaluators must provide comments to substantiate their sub-factor risk ratings, particularly where the sub-factor rating differs markedly from the ratings of the underlying elements.
3. Evaluate the risk of the Offeror's approach at the sub-factor level. See "Corporate Capability & Past Performance Evaluation" below for additional instructions.

Corporate Capability & Past Performance Risk Evaluation

Evaluators are required to determine the risk level of the Offeror's corporate capability and past performance, but only at the sub-factor level. This level reflects the risk associated with the sub-factor overall; however evaluators should consider the risks of the underlying elements. Evaluators should consider any and all types of risk when assigning a risk rating. Types of risks may include, but are not limited to solution complexity, reliability, flexibility, scalability, lack of established track record, lack of industry expertise, limited technical capabilities, overall practicality of an approach, or unrealistic assumptions.

Evaluators should ask the following questions when evaluating the risk inherent in the Offeror's approach relative to each element listed:

- ◆ Did the Offeror identify the relevant risks?
- ◆ Are there any important risks that are not mentioned?
- ◆ What is the overall likelihood of these risks?
- ◆ What is the expected severity of impact from these risks?
- ◆ Did the Offeror propose a mitigation strategy that minimizes the likelihood and/or severity of these risks? (see c.2.C.8 Risk Management Approach and A2.2.2 Risk Assessment)

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

HRLOB Migration Planning Guidance: << OFFEROR >> – Agency Contract Office

Evaluators should use the following definitions when assigning a risk rating to each sub-factor:

Risk Rating	Definition
Low	Offeror and/or subcontractor corporate capability and past performance pose low risk to the Government.
Moderate	Offeror and/or subcontractor corporate capability and past performance pose moderate risk to the Government. 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. Some effort by the Offeror will likely overcome identified deficiencies by the time of migration.
High	Offeror and/or subcontractor corporate capability and past performance pose high risk to the Government. Offeror is unlikely to overcome identified deficiencies by the time of migration, even with a strong effort.
NR	Offeror and/or subcontractor corporate capability and past performance pose no risk to the Government.

Given the importance and subjective nature of the risk evaluation, evaluators are encouraged to write explanatory comments on all risk ratings; however, comments are only required where the risk rating is moderate or high.

HRLOB Migration Planning Guidance: << OFFEROR >> – Agency Contract Office

Element / Evaluation Criteria	Proposal Review Risk Rating (Circle One)	OCD Risk Rating (from OCD Corp. Cap. Eval. Form) (Circle One)	Final Risk Rating (Circle One)	Rationale and/or Additional Comments
CORPORATE CAPABILITY & PAST PERFORMANCE RISK EVALUATION				
1. PROVIDER PROFILE & CORPORATE CAPABILITY				
c.3.A – Provider Profile RFP p. ##	LOW MODERATE HIGH	LOW MODERATE HIGH	LOW MODERATE HIGH NR	
c.3.A – Provider Profile (con't.) – Contact and Small Business Information RFP p. ##	LOW MODERATE HIGH			
c.3.B – Capabilities and Experience of Offeror – Capabilities RFP p. ##	LOW MODERATE HIGH			
c.3.B – Capabilities and Experience of Offeror – Experience RFP p. ##	LOW MODERATE HIGH			
c.3.B.1 – Subcontractors RFP p. ##	LOW MODERATE HIGH			

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

HRLOB Migration Planning Guidance: << OFFEROR >> – Agency Contract Office

Element / Evaluation Criteria	Proposal Review Risk Rating (Circle One)	OCD Risk Rating (from OCD Corp. Cap. Eval. Form) (Circle One)	Final Risk Rating (Circle One)	Rationale and/or Additional Comments
CORPORATE CAPABILITY & PAST PERFORMANCE RISK EVALUATION				
2. PAST PERFORMANCE				
c.3.C.3 – Past Performance Metrics and Audits RFP p. ##	LOW MODERATE HIGH	LOW MODERATE HIGH	LOW MODERATE HIGH NR	
c.3.C.4 – ERP Solution RFP p. ##	LOW MODERATE HIGH			
c.3.C.5 – Extent of Customization RFP p. ##	LOW MODERATE HIGH			
c.3.C.6 – Interface Experience RFP p. ##	LOW MODERATE HIGH			
c.3.C.7 – Telecommunications RFP p. ##	LOW MODERATE HIGH			
c.3.C.8 – Subcontractors RFP p. ##	LOW MODERATE HIGH			
c.3.C.9 – EVMS RFP p. ##	LOW MODERATE HIGH			

HRLOB Migration Planning Guidance: << OFFEROR >> – Agency Contract Office

Element / Evaluation Criteria	Proposal Review Risk Rating (Circle One)	OCD Risk Rating (from OCD Corp. Cap. Eval. Form) (Circle One)	Final Risk Rating (Circle One)	Rationale and/or Additional Comments
CORPORATE CAPABILITY & PAST PERFORMANCE RISK EVALUATION				
3. CLIENT REFERENCES				
c.3.B.2 List of References RFP p. ##	LOW MODERATE HIGH	LOW MODERATE HIGH	LOW MODERATE HIGH NR	
c.3.C.1 Past Performance References for the Prime Contractor RFP p. ##	LOW MODERATE HIGH			
c.3.C.1 Past Performance References for the Sub- Contractor RFP p. ##	LOW MODERATE HIGH			



UNITED STATES
OFFICE OF PERSONNEL MANAGEMENT
1900 E Street, NW
Washington, DC 20415