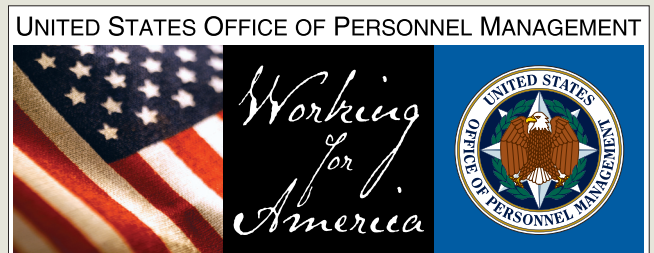




UNITED STATES OFFICE OF PERSONNEL MANAGEMENT

# MIGRATION PLANNING GUIDANCE ATTACHMENT G EVALUATION TEMPLATES

May 23, 2008



**HRLOB Migration Planning Guidance: << OFFEROR >> – Functional Evaluation Team**

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

**Evaluation Criteria Matrix - Functional Capability and Approach 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 Evaluation
- ◆ Price Evaluation

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 evaluation sub-factors and elements (if applicable) for detailed analysis, as appropriate. The following example illustrates this breakdown:

- ◆ Evaluation Factor: Functional Capability and Approach
  - Evaluation Sub-factor: Capability of the Solution
    - Evaluation Element: Personnel Action Processing

This evaluation matrix supports the factor of Functional Capability and Approach and is divided into evaluation sub-factors and elements. Evaluators should take the following approach to evaluating Offeror responses using this matrix:

1. Evaluate the functional proposal response at the element level. See “How to complete the Functional Evaluation Matrix” below for additional instructions.
2. 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.
3. 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).
4. 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.

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### Team Primary Responsibilities Areas

There are a total of 16 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 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 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 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 Evaluation Matrix – Risk (Corp Cap) p. 3-5

## HRLOB Migration Planning Guidance: << OFFEROR >> – Functional Evaluation Team

### How to complete the Functional 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 proposes an acceptable functional approach and solution to fulfill Federal agency needs.
YELLOW	Needs Improvement	Offeror proposes a functional approach or solution that needs improvement in order to become acceptable to fulfill Federal agency needs. Offeror's approach or solution will need improvement prior to migration.
RED	Unacceptable	Offeror proposes a functional approach or solution that is unacceptable.

For functional 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.

## HRLOB Migration Planning Guidance: << OFFEROR >> – Functional Evaluation Team

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.

**HRLOB Migration Planning Guidance: << OFFEROR >> – Functional Evaluation Team**

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
<b>FUNCTIONAL CAPABILITY</b>							
<b>1. FEATURES AND FUNCTIONALITY (Overall)</b>							
<p><b>GREEN</b> – Offeror proposes an acceptable functional approach and solution to fulfill Federal agency needs.  <b>YELLOW</b> – Offeror proposes a functional approach or solution that needs improvement in order to become acceptable to fulfill Federal agency needs. Offeror’s approach or solution will need improvement prior to migration.  <b>ORANGE</b> – Offeror has provided insufficient information. Additional information is needed from the Offeror to fully assess this item.  <b>RED</b> – Offeror proposes a functional approach or solution that is unacceptable.</p>		<p><b>GREEN</b>  <b>YELLOW</b>  <b>ORANGE</b>  <b>RED</b></p>			<p><b>GREEN</b>  <b>YELLOW</b>  <b>RED</b>  <b>NR</b></p>	<p><b>GREEN</b>  <b>YELLOW</b>  <b>RED</b></p>	
Features and Functionality	<p><b>c.2.D.1 Functional Description</b>  RFP p. ##</p> <p><b>GREEN</b> – Offeror proposes an acceptable solution that will provide the agency with a range of human resources services. The Offeror provides, at a minimum, a description of: the proposed HR IT system(s) to be used in the Offeror’s SSCs to provide services of the proposed implementation process and the average timelines for implementing similar services on previous customer implementations.  <b>YELLOW</b> – Offeror’s approach or solution will need improvement prior to migration.  <b>ORANGE</b> – Offeror has provided insufficient information. Additional information is needed from the Offeror to fully assess this item.  <b>RED</b> – Offeror proposes a functional approach or solution that is unacceptable.</p>	<p><b>GREEN</b>  <b>YELLOW</b>  <b>ORANGE</b>  <b>RED</b></p>			<p><b>GREEN</b>  <b>YELLOW</b>  <b>RED</b>  <b>NR</b></p>		
Features and Functionality	<p><b>c.2.D.4 HR LOB Functional Compliance</b>  RFP p. ##</p> <p><b>GREEN</b> – Offeror describes an acceptable HR LOB SSC-specific functional compliance</p>	<p><b>GREEN</b>  <b>YELLOW</b>  <b>ORANGE</b></p>			<p><b>GREEN</b>  <b>YELLOW</b>  <b>RED</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
	<p>approach and methodology for ensuring that the HR LOB SSC solution is developed in a manner consistent and compliant with the eGov initiatives, Target Requirements for HR LOB SSCs and other standards included in this RFP.</p> <p><b>YELLOW</b> – Offeror’s approach or solution will need improvement prior to migration.</p> <p><b>ORANGE</b> – Offeror has provided insufficient information. Additional information is needed from the Offeror to fully assess this item.</p> <p><b>RED</b> – Offeror proposes a functional approach or solution that is unacceptable.</p>	<b>RED</b>			NR		
<p><b>2. CHANGE MANAGEMENT (Overall)</b></p> <p><b>GREEN</b> – Offeror proposes an acceptable change-management approach and solution to fulfill Federal agency needs.</p> <p><b>YELLOW</b> – Offeror proposes a change-management approach or solution that needs improvement in order to become acceptable to fulfill Federal agency needs. Offeror’s approach or solution will need improvement prior to migration.</p> <p><b>ORANGE</b> – Offeror has provided insufficient information. Additional information is needed from the Offeror to fully assess this item.</p> <p><b>RED</b> – Offeror proposes a functional approach or solution that 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>NR</p>	<p><b>GREEN</b></p> <p><b>YELLOW</b></p> <p><b>RED</b></p>	
Change Management	<p><b>c.2.D.2 Change Management</b> RFP p. ##</p> <p><b>GREEN</b> – Offeror conveys an acceptable Organizational Change-Management proposed approach to support on-going Change-Management tasks that include, but are not necessarily limited to: solution familiarization/communication; product roll-out preparation; agency readiness/preparation; solution marketing; and organizational planning. The Offeror proposes an acceptable approach to facilitate the organizational, cultural, and</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>NR</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
	<p>change acceptance necessary for adopting/adapting re-engineered/modernized business processes and solutions in the agency environment.</p> <p>The Offeror adequately describes their activities for supporting the identification, development, and documentation of business processes which are impacted by implementation of their proposed solution, including gap analysis of required vs. current data elements.</p> <p>The Offeror documents and describes the levels of support they propose to provide the agency in the implementation of their solution to address the changes in organizational processes likely to be required to fully utilize the solution. This should include:</p> <ol style="list-style-type: none"> <li>1. How issues related to change of the solution are addressed.</li> <li>2. How those issues are resolved.</li> <li>3. What type and level of analysis is performed to assess the impact of proposed system changes on the customer’s organizational business processes.</li> <li>4. How change to the solution and business processes surrounding the solution are communicated to customer organizations.</li> </ol> <p><b>YELLOW</b> – Offeror’s approach or solution will need improvement prior to migration.</p> <p><b>ORANGE</b>– Offeror has provided insufficient information. Additional information is needed from the Offeror to fully assess this item.</p> <p><b>RED</b> – Offeror proposes a change-management approach or solution that is unacceptable.</p>						
<b>3. TRAINING (Overall)</b>		<b>GREEN</b>					



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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
	<p><b>GREEN</b> – Offeror proposes an acceptable training approach and solution to fulfill Federal agency needs.</p> <p><b>YELLOW</b> – Offeror proposes a training approach or solution that needs improvement in order to become acceptable to fulfill Federal agency needs. Offeror’s approach or solution will need improvement prior to migration.</p> <p><b>ORANGE</b>– Offeror has provided insufficient information. Additional information is needed from the Offeror to fully assess this item.</p> <p><b>RED</b> – Offeror proposes a functional approach or solution that is unacceptable.</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>	
Training	<p><b>c.2.D.3 Training Approach</b> RFP p. ##</p> <p><b>GREEN</b> – Offeror proposes an agency SSC-specific acceptable approach and methodology for training that covers the full spectrum of comprehensive, innovative and cost effective training throughout the life cycle. The training approach includes all components necessary to prepare the agency user community to successfully perform their roles in the “to be” agency SSC environment. Additionally, the training approach addresses post go-live training and the ongoing measurement of the personnel’s efficiency in order to apply targeted training to areas of deficiency. The Offeror clearly explains proposed HR LOB SSC/agency involvement (e.g., subject matter experts, end users, etc.), methods, tools, types of training (classroom, Computer-Based Training (CBT)/e-learning, long-distance learning, etc.), and training plans to include training materials, scheduling, execution, evaluation, and any other training plans and approaches provided by the strategy.</p> <p><b>YELLOW</b> – Offeror proposes a training approach or solution that needs improvement in order to become acceptable to fulfill Federal agency</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
	<p>needs. Offeror’s approach or solution will need improvement prior to migration.</p> <p><b>ORANGE</b> – Offeror has provided insufficient information. Additional information is needed from the Offeror to fully assess this item.</p> <p><b>RED</b> – Offeror proposes a training approach or solution that is unacceptable.</p>						
<p><b>4a. CAPABILITY OF THE SOLUTION - CORE HR FUNCTIONS (Overall)</b></p>	<p><b>GREEN</b> – Offeror proposes an acceptable functional approach and solution to fulfill Federal agency needs. The Offeror provides a specific and acceptable description of its agency SSC approach for providing existing as well as improved functional capabilities. The Offeror provides Personnel Action Processing and Benefits Management services. While providing Compensation Management/ Payroll Services is not mandatory, the Offeror has, at a minimum, adequately described how their solution and services can be integrated with those of an approved Payroll provider.</p> <p><b>YELLOW</b> – Offeror proposes a functional approach or solution that needs improvement in order to become acceptable to fulfill Federal agency needs. Offeror’s approach or solution will need improvement prior to migration.</p> <p><b>ORANGE</b> – Offeror has provided insufficient information. Additional information is needed from the Offeror to fully assess this item.</p> <p><b>RED</b> – Offeror proposes a functional approach or solution that 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>	<p><b>GREEN</b></p> <p><b>YELLOW</b></p> <p><b>RED</b></p>	
<p>Capability of the Solution</p>	<p><b>c.2.D.5.a Personnel Action Processing</b> RFP p. ##</p> <p><b>GREEN</b> – Offeror provides an acceptable description of their personnel action processing solution for the agency SSC that offers the capability to initiate and process personnel actions as described in The Guide to Processing Personnel Actions. The solution will use automated workflow to route the personnel action through its</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
	<p>approval sequence and provide appropriate notifications. The Offeror’s description should address how they will provide the processing services defined in detail in Appendix A to the document HR LOB Target Requirements for SSCs version 2.</p> <p><b>YELLOW</b> – Offeror proposes a functional approach or solution that needs improvement in order to become acceptable to fulfill Federal agency needs. Offeror’s approach or solution will need improvement prior to migration.</p> <p><b>ORANGE</b>– Offeror has provided insufficient information. Additional information is needed from the Offeror to fully assess this item.</p> <p><b>RED</b> – Offeror proposes a functional approach or solution that is unacceptable.</p>						
Capability of the Solution	<p><b>c.2.D.5.b Benefits Management</b> RFP p. ##</p> <p><b>GREEN</b> – Offeror provides an acceptable description of their benefits-management solution that offers web-based employee self-service capabilities for benefits enrollment. Specific functionality includes: activate benefits enrollments based on pre-defined business rules and make benefits-participation data available to payroll and benefits providers. SSCs will also deliver benefits communication. SSCs will support both government-wide and agency-specific benefits programs. For agency-specific benefits programs, SSCs will provide consultative support to agencies on communication content and approach and will provide facilities and media to deliver benefits communication to employees.</p> <p><b>YELLOW</b> – Offeror proposes a functional approach or solution that needs improvement in order to become acceptable to fulfill Federal agency needs. Offeror’s approach or solution will</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
	need improvement prior to migration. <b>ORANGE</b> – Offeror has provided insufficient information. Additional information is needed from the Offeror to fully assess this item. <b>RED</b> – Offeror proposes a functional approach or solution that is unacceptable.						
Capability of the Solution	<b>c.2.D.5.c Compensation Management/ Payroll Services</b> RFP p. ##  <b>GREEN</b> – If requested, the Offeror provides an acceptable description of their compensation-management solution for the agency SSC that includes tools to support manager’s pay and award decisions, leave processing, and end-to-end payroll processing (setup, processing, disbursement support, annual pay adjustment processing, reporting, compliance) using self-service and automated workflow to manage time reporting and approval and payroll processing. <b>If the agency does not seek Compensation-Management/Payroll Services, the Offeror must discuss how their solution can integrate with an external payroll system.</b> <b>YELLOW</b> – Offeror proposes a functional approach or solution that needs improvement in order to become acceptable to fulfill Federal agency needs. Offeror’s approach or solution will need improvement prior to migration. <b>ORANGE</b> – Offeror has provided insufficient information. Additional information is needed from the Offeror to fully assess this item. <b>RED</b> – Offeror proposes a functional approach or solution that is unacceptable.	<p style="text-align: center;"> <b>GREEN</b>  <b>YELLOW</b>  <b>ORANGE</b>  <b>RED</b> </p>			<p style="text-align: center;"> <b>GREEN</b>  <b>YELLOW</b>  <b>RED</b>  <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
4b. CAPABILITY OF THE SOLUTION - NON-CORE HR FUNCTIONS (one or more functions)	<p><b>GREEN</b> – Offeror proposes an acceptable functional approach and solution to fulfill Federal agency needs in <b>one or more non-core HR functional areas</b>.</p> <p><b>YELLOW</b> – Offeror proposes a functional approach or solution that needs improvement in order to become acceptable to fulfill Federal agency needs. Offeror’s approach or solution will need improvement prior to migration.</p> <p><b>ORANGE</b> – Offeror has provided insufficient information. Additional information is needed from the Offeror to fully assess this item.</p> <p><b>RED</b> – Offeror proposes a functional approach or solution that 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>NOT OFFERED</b></p>			NR	SAME AS PROPOSAL REVIEW RATING	
Capability of the Solution	<p><b>c.2.D.5.d HR Strategy</b> RFP p. ##</p> <p><b>GREEN</b> – Offeror provides an acceptable description of how they will provide the HR Strategy services defined in detail in Appendix D to the document HR LOB Target Requirements for Shared Service Centers Version 2.</p> <p><b>YELLOW</b> – Offeror proposes a functional approach or solution that needs improvement in order to become acceptable to fulfill Federal agency needs. Offeror’s approach or solution will need improvement prior to migration.</p> <p><b>ORANGE</b> – Offeror has provided insufficient information. Additional information is needed from the Offeror to fully assess this item.</p> <p><b>RED</b> – Offeror proposes a functional approach or solution that 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>NOT OFFERED</b></p>			NR	SAME AS PROPOSAL REVIEW RATING	
Capability of the Solution	<p><b>c.2.D.5.e Organization and Position Management</b> RFP p. ##</p> <p><b>GREEN</b> – Offeror provides an acceptable description of how they will provide the</p>	<p><b>GREEN</b></p> <p><b>YELLOW</b></p> <p><b>ORANGE</b></p>			NR	SAME AS PROPOSAL REVIEW RATING	

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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
	<p>Organization and Position Management services defined in detail in Appendix E to the document HR LOB Target Requirements for Shared Service Centers Version 2.</p> <p><b>YELLOW</b> – Offeror proposes a functional approach or solution that needs improvement in order to become acceptable to fulfill Federal agency needs. Offeror’s approach or solution will need improvement prior to migration.</p> <p><b>ORANGE</b> – Offeror has provided insufficient information. Additional information is needed from the Offeror to fully assess this item.</p> <p><b>RED</b> – Offeror proposes a functional approach or solution that is unacceptable.</p>	<p><b>RED</b></p> <p><b>NOT OFFERED</b></p>					
Capability of the Solution	<p><b>c.2.D.5.f Staff Acquisition</b> RFP p. ##</p> <p><b>GREEN</b> – Offeror provides an acceptable description of how they will provide the Staff Acquisition services defined in detail in Appendix F to the document HR LOB Target Requirements for Shared Service Centers Version 2.</p> <p><b>YELLOW</b> – Offeror proposes a functional approach or solution that needs improvement in order to become acceptable to fulfill Federal agency needs. Offeror’s approach or solution will need improvement prior to migration.</p> <p><b>ORANGE</b> – Offeror has provided insufficient information. Additional information is needed from the Offeror to fully assess this item.</p> <p><b>RED</b> – Offeror proposes a functional approach or solution that 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>NOT OFFERED</b></p>			NR	SAME AS PROPOSAL REVIEW RATING	
Capability of the Solution	<p><b>c.2.D.5.g Performance Management</b> RFP p. ##</p> <p><b>GREEN</b> – Offeror provides an acceptable description of how they will provide the</p>	<p><b>GREEN</b></p> <p><b>YELLOW</b></p> <p><b>ORANGE</b></p>			NR	SAME AS PROPOSAL REVIEW RATING	

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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
	<p>Performance-Management services defined in detail in Appendix G to the document HR LOB Target Requirements for Shared Service Centers Version 2.</p> <p><b>YELLOW</b> – Offeror proposes a functional approach or solution that needs improvement in order to become acceptable to fulfill Federal agency needs. Offeror’s approach or solution will need improvement prior to migration.</p> <p><b>ORANGE</b> – Offeror has provided insufficient information. Additional information is needed from the Offeror to fully assess this item.</p> <p><b>RED</b> – Offeror proposes a functional approach or solution that is unacceptable.</p>	<p><b>RED</b></p> <p><b>NOT OFFERED</b></p>					
<p>Capability of the Solution</p>	<p><b>c.2.D.5.h Compensation Management</b> RFP p. ##</p> <p><b>GREEN</b> – Offeror provides an acceptable description of how they will provide the compensation management services as defined in Appendix H to the document HR LOB Target Requirements for Shared Service Centers Version 2.</p> <p><b>YELLOW</b> – Offeror proposes a functional approach or solution that needs improvement in order to become acceptable to fulfill Federal agency needs. Offeror’s approach or solution will need improvement prior to migration.</p> <p><b>ORANGE</b> – Offeror has provided insufficient information. Additional information is needed from the Offeror to fully assess this item.</p> <p><b>RED</b> – Offeror proposes a functional approach or solution that 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>NOT OFFERED</b></p>			<p>NR</p>	<p><b>SAME AS PROPOSAL REVIEW RATING</b></p>	
<p>Capability of the Solution</p>	<p><b>c.2.D.5.i Human Resources Development</b> RFP p. ##</p> <p><b>GREEN</b> – Offeror provides an acceptable description of how they will provide the</p>	<p><b>GREEN</b></p> <p><b>YELLOW</b></p> <p><b>ORANGE</b></p>			<p>NR</p>	<p><b>SAME AS PROPOSAL REVIEW RATING</b></p>	

**HRLOB Migration Planning Guidance: << OFFEROR >> – Functional Evaluation Team**

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
	Human Resources Development services defined in detail in Appendix I to the document HR LOB Target Requirements for Shared Service Centers Version 2. <b>YELLOW</b> – Offeror proposes a functional approach or solution that needs improvement in order to become acceptable to fulfill Federal agency needs. Offeror’s approach or solution will need improvement prior to migration. <b>ORANGE</b> – Offeror has provided insufficient information. Additional information is needed from the Offeror to fully assess this item. <b>RED</b> – Offeror proposes a functional approach or solution that is unacceptable.	<b>RED</b>  <b>NOT OFFERED</b>					
Capability of the Solution	<b>c.2.D.5.j Employee Relations</b> RFP p. ##  <b>GREEN</b> – Offeror provides an acceptable description of how they will provide the Employee Relations services defined in Appendix J to the document HR LOB Target Requirements for Shared Service Centers Version 2. <b>YELLOW</b> – Offeror proposes a functional approach or solution that needs improvement in order to become acceptable to fulfill Federal agency needs. Offeror’s approach or solution will need improvement prior to migration. <b>ORANGE</b> – Offeror has provided insufficient information. Additional information is needed from the Offeror to fully assess this item. <b>RED</b> – Offeror proposes a functional approach or solution that is unacceptable.	<b>GREEN</b>  <b>YELLOW</b>  <b>ORANGE</b>  <b>RED</b>  <b>NOT OFFERED</b>			NR	SAME AS PROPOSAL REVIEW RATING	
Capability of the Solution	<b>c.2.D.5.k Labor Relations</b> RFP p. ##  <b>GREEN</b> – Offeror provides an acceptable description of how they will provide the Labor Relations Development services	<b>GREEN</b>  <b>YELLOW</b>  <b>ORANGE</b>			NR	SAME AS PROPOSAL REVIEW RATING	



**HRLOB Migration Planning Guidance: << OFFEROR >> – Functional Evaluation Team**

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
	defined in Appendix K to the document HR LOB Target Requirements for Shared Service Centers Version 2. <b>YELLOW</b> – Offeror proposes a functional approach or solution that needs improvement in order to become acceptable to fulfill Federal agency needs. Offeror’s approach or solution will need improvement prior to migration. <b>ORANGE</b> – Offeror has provided insufficient information. Additional information is needed from the Offeror to fully assess this item. <b>RED</b> – Offeror proposes a functional approach or solution that is unacceptable.	<b>RED</b>  <b>NOT OFFERED</b>					
Capability of the Solution	<b>c.2.D.5.1 Separations Management</b> RFP p. ##  <b>GREEN</b> – Offeror provides an acceptable description of how they will provide the Separation-Management services defined in Appendix L to the document HR LOB Target Requirements for Shared Service Centers Version 2. <b>YELLOW</b> – Offeror proposes a functional approach or solution that needs improvement in order to become acceptable to fulfill Federal agency needs. Offeror’s approach or solution will need improvement prior to migration. <b>ORANGE</b> – Offeror has provided insufficient information. Additional information is needed from the Offeror to fully assess this item. <b>RED</b> – Offeror proposes a functional approach or solution that is unacceptable	<b>GREEN</b> <b>YELLOW</b> <b>ORANGE</b> <b>RED</b> <b>NOT OFFERED</b>			NR	<b>SAME AS PROPOSAL REVIEW RATING</b>	



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