

APPENDIX VIII

2027/2028 SGR RFP

PROPOSAL EVALUATION INSTRUMENT

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Applicant: _____

Reviewer: _____

Date: _____

Point Value	Description
4	Exceeds expectations. Demonstrates highest level of compliance with the RFP requirements. The presentation is superior in its detail, responsiveness, quality, clarity and organization.
3	Exceeds minimum expectations. Demonstrates good compliance with the RFP requirements in a consistent manner; information is accurate; presentation is clear, understandable and concise.
2	Meets minimum expectations. Demonstrates minimal compliance with the RFP requirements. The presentation is unclear and/or inconsistent in some areas.
1	Fails to meet minimum expectations. Demonstrates insufficient compliance with RFP requirements.
0	RFP is incomplete. Required item(s) not included; inadequate or no justification provided for omission included in RFP.

The full proposal evaluation instrument includes this page and the following components:

- 1) Program Evaluation Instrument
- 2) Contract Evaluation Instrument
- 3) Organization Capabilities Evaluation Instrument
- 4) Rating Summary Sheet

Area Agency on Aging of Palm Beach/Treasure Coast, Inc.
2027/2028 SGR SPA Program Evaluation Instrument
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Item #	PROGRAM MODULE ITEM	RATING	COMMENTS
II. A	Program Module - General Requirements		
1	Demographic and Community Care Service System		MAXIMUM POINT VALUE = 4
	Bidder presented material in a clear, concise and detailed manner. a.) The bidder has provided an overview of the social economic and demographic characteristics of their Community Care Service Area with focus given to geographic areas and population groups within the Community Care Service Area that have special needs. b.) The bidder described their experience providing case management services under programs which are similar or identical to the requirements under CCE, HCE, and ADI. Bidders documented they have a minimum of 2 years case management experience for a program of similar size and scope. c.) The bidder has the ability to accept referrals and provide services on a Community Care Service Area-wide basis. This must include administering and managing programs for Community Care for the Elderly (CCE), the Home Care for the Elderly (HCE), and the Alzheimer's Disease Initiative (ADI). d) Describe your agency's efforts to participate in local networks and consortiums where hospitals, home health, social and medical providers, and Memory Disorder Clinics are represented in order to target high-risk individuals in need of services. It is important to include strategies for gaining input from the public in your agency's planning process. This should address how your agency will reach out to the community for feedback when significant program service changes are being considered (i.e. discontinuation of service or change in model being utilized to provide services).		

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Item #	PROGRAM MODULE ITEM	RATING	COMMENTS
2	Consumer Identification		MAXIMUM POINT VALUE = 4
	The following procedures, practices and processes meet all state program guidelines. All material was provided in detail and presented in clear, concise and thorough manner. a.) Planned outreach activities will identify and inform frail elders and their caregivers of the range and availability of services. b.) The bidder has described outreach efforts and the process of coordinating all formal and informal resources to meet client need (ADRC, Food Stamps, etc...) c.) The bidder has described their process for referral to the ADRC for intake and screening, assessment and eligibility determination of consumers. d.) Describe what procedures are in place to request pre-enrollment listed clients through communication with the Agency following Agency Consumer Activation Protocols. The plans and procedures are described adequately to request enrollment of their pre-enrollment list through communication with the ADRC and adhere to the Area Agency on Aging of Palm Beach/Treasure Coast, Inc. pre-enrollment procedures. e.) Describe how your agency will staff referrals from the Department of Children and Families for Aging Out and Adult Protective Services (APS) high risk clients and other assessed priority ranked community referred clients utilizing the required priority ranking guidelines. The process and procedure for responding to referrals from Adult Protective Services complies with all state statutes and meets program guidelines. f.) Provide current copies of the internal procedures that will ensure first priority service delivery to APS High Risk clients. g.) Provide copies of the current procedures your agency uses to ensure client data entry into APS Referral Tracking Tool (ARTT) and Enterprise Client Information and Registration Tracking System (eCIRTS) occurs as required. Include the agency's internal tracking log and provide assurance that all required case managers have received the necessary ARTT Training Tutorial and certifications. The training log and case manager certification(s) assuring compliance must be included in the agency's Appendix to the Service Provider Application. h.) Provide current copies of the internal procedures which ensure prioritization as well as appropriate and timely follow through on referrals through the ADRC. The procedure should include each step from the initial receipt of the referral through all required and documented actions. i.) What plans and procedures are in place to interface with the ADRC's Information and Referral function? Describe the steps and criteria your agency will use to determine if a caller should be referred to the ADRC's Helpline. Provide current copies of your agency's ADRC interface and determination policies and procedures in the Service Provider Application (SPA) Appendix.		

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Item #	PROGRAM MODULE ITEM	RATING	COMMENTS
3	Case Management Functions		MAXIMUM POINT VALUE = 4
	The following procedures, practices and processes meet all state program guidelines and were provided in a clear, concise and thorough manner. a.) Case Management functions for consumer assessments and care plan development include actions steps; number of staff involved; consumer to case manager ratios and average timelines. Specifically address the timeline procedures from the ADRC pre-enrollment authorization date through service initiation. The timeline should correlate with the current applicable pre-enrollment guidelines and with processes that are streamlined to ensure consumers are promptly assessed and enrolled. b.) Includes information on the provision for overall coordination of the proposed method of informing consumers of all the programs and services accessible through the lead agency c.) Includes the procedures for reviewing ongoing eligibility for transfer of consumers from general revenue funded programs into the Statewide Medicaid Managed Care Long Term Care program. Explain your agency's process for reviewing general revenue funded clients for potential services in other DOEA funded and non-funded programs, including steps staff will utilize when wait listing clients. Please note – The Lead Agency's process should include a mechanism for notifying the ADRC when an individual appears to be eligible for Statewide Medicaid Managed Care Long Term Care (SMMC LTC) services; however, it is the ADRC's responsibility to enroll the individual on the Assessed Prioritized Client List (i.e. APCL for LTCC) for Medicaid Waiver services (preferred method is a fax referral). d.) Describes how all other available alternative resources for consumer services will be explored, utilized and documented prior to using state general revenue funding to provide services. e.) Includes bidder's internal procedures for assessing and collecting co-payments. Identify any changes your agency plans to make to the internal procedures to improve the assessing, billing or collection of co-payments.		

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Item #	PROGRAM MODULE ITEM	RATING	COMMENTS
4	Services		MAXIMUM POINT VALUE = 4
	Bidder presented material in a clear, concise and thorough manner. It is important that Lead Agencies ensure that a variety of home-delivered, day care services, and other basic services needed to prevent institutionalization are available within your service area. When planning your agency's service array, please take into account the recent Area Agency on Aging of Palm Beach/Treasure Coast, Inc. Area Plan indicating priority service needs. Make sure to address the required and optional services in SECTION B.1.d "Services to be Coordinated" section of the RFP. Material included: a.) List the services your agency will offer other than Case Management. Note: A detailed explanation of each service must be provided in section "II.A.12. "Description of Service Delivery". b.) The bidder has indicated which services will be provided directly. c.) The bidder has indicated which services they intend to subcontract. d.) IF APPLICABLE - The bidder provided the procedure(s) used for selection of qualified subcontractors. e.) Outline the process for ensuring all required subcontractor employees/volunteers have successfully completed a level 2 background screening. f.) IF APPLICABLE - The bidder has included an action plan for monitoring subcontractors. The action plan includes a monitoring schedule and report timeline. Presented in a clear, concise and thorough manner. g.) Complete the attached "Subcontract Monitoring Schedule" on the following page. Include information on all subcontractors who will provide services with State General Revenue funding. h.) Copies of all proposed and existing CCE, HCE, and ADI subcontracts were submitted with the SPA.		

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Item #	PROGRAM MODULE ITEM	RATING	COMMENTS
5	Quality Assurance		MAXIMUM POINT VALUE = 4
	Bidder presented material in a clear, concise and thorough manner. Material included: a.) The bidder provided a description of the methods and procedures that will be utilized to assure the delivery of quality service(s) by its staff. The description included process and frequency. Provide current copies of your Quality Assurance/Quality Initiative procedures in the SPA Appendix. b.) IF APPLICABLE - The bidder provided a description of the methods and procedures used to assure the delivery of quality service(s) by its subcontractors. The description included process and frequency. c.) The bidder provided a description of how the results of the quality assurance process will be used to improve services and/or service delivery. Provide a narrative of quality improvement initiatives undertaken by your agency during the 2025 contract year as appropriate. d.) In-Service Case Management Staff Training 1. Describe your plan to provide required six (6) hours of in-service training to case management staff. Your plan should include the minimum standards as outlined in the DOEA Programs and Services Handbook. 2. List and describe all Case Management Staff Training Lesson Topics and your anticipated schedule for training dates (see Chapter 2, In-Service Training Program for required standards). 3. Include a copy of the bidder's current Case Management Training records in the SPA Appendix in order to provide assurance that all case managers are current and have received the required training for their positions. Include certification documents for all currently employed case managers to ensure they have received the required training on the new DOEA Comprehensive Assessment (DOEA 701B) screening form. e.) Provide current copy of the policies and procedures your agency uses to evaluate consumer satisfaction in the SPA Appendix. The policies should include: 1) the proposed survey schedule, 2) proposed sample size, 3) tabulation information, 4) analysis and follow up process, 5) information on how the results are utilized to make improvements to services, and 6) timeframe for forwarding the results of the survey to the Area Agency on Aging of Palm Beach/Treasure Coast, Inc. Please provide a sample survey, copy of the agency's 2025 consumer satisfaction survey results, including the analysis and any necessary follow-up in the SPA Appendix.		

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Item #	PROGRAM MODULE ITEM	RATING	COMMENTS
6	Process for Incident Reporting and Consumer Complaint and Grievance Procedures		MAXIMUM POINT VALUE = 4
	Bidder presented material in a clear, concise and thorough manner. Material included: a.) The bidder explained their policies and procedures for ensuring compliance with the required reporting of incidents as outlined in Paragraph 20 of the Community Care for the Elderly Standard Agreement and consistent with Chapter 415, F.S. and all related Department of Elder Affairs Notices of Instruction. Include a copy of your agency's Incident Reporting Procedure and blank log in the SPA Appendix. b) The bidder provided a summary of the process their agency follows for receiving, reporting and remediating consumer complaints. Include a copy of the agency's Complaint Procedures and blank log in the SPA Appendix. Please be sure that the complaint log allows for detailed information to be maintained, including the criteria outlined in Paragraph 9.2 of the Community Care for the Elderly Standard Agreement. c.) The bidder explained their agency's process for handling consumer grievances; along with the process for appeals regarding denial, reduction, or termination of services. The grievance procedures must provide for informing all consumers of the grievance/appeal process and providing assistance to consumers desiring to file a grievance/appeal. It must be consistent with DOEA Programs and Services Handbook (See Appendix D, Minimum Guidelines for Recipient Grievance Procedures) and all related Department of Elder Affairs Notices of Instruction. Include a copy of your agency's Grievance Procedures and blank log in the SPA Appendix. The applicant's Grievance Procedure must comply with the Community Care for the Elderly Standard Agreement.		

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Item #	PROGRAM MODULE ITEM	RATING	COMMENTS
7	Reporting		MAXIMUM POINT VALUE = 4
	Bidder presented material in a clear, concise and thorough manner. Material included: a.) The bidder outlined the procedures for accurate and timely entry of all service and consumer specific information into the eCIRTS database. The bidder's process includes a sufficient method of checking and cross checking data entered into eCIRTS to ensure accuracy. b.) The bidder described the policies and procedures for utilizing available eCIRTS reports including how these reports are used to improve data integrity in the eCIRTS database. The data integrity maintenance process is thorough and designed to ensure accuracy. c.) Include a listing of all reports run, the schedule for running these eCIRTS reports and required follow-up due dates for staff addressing any exceptions noted as part of this process. d.) Provide current copies of your agency's internal policies and procedures utilized to ensure timely and accurate eCIRTS reporting, data security, and computer system back-up and recovery in the SPA Appendix. These procedures: 1) Describe the concrete steps your agency intends to follow in order to provide for accurate and timely entry and transmittal of all service(s) and client specific information in the eCIRTS database. 2) Describe what security measures are in place to address confidentiality and client-specific information. 3) Address data integrity issues by describing the steps to be followed in order to obtain data security, computer system back-up and recovery. 4) Applicants for Lead Agency designation must demonstrate that they have sufficient resources, in terms of both trained staff and equipment, to complete accurate and timely eCIRTS data entry and access electronic mail from DOEA and the AAAPB/TC. Applicants must present evidence of an adequate number of trained staff to meet the data entry and data maintenance requirements of the CCE, HCE, and ADI programs in a timely fashion.		

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Item #	PROGRAM MODULE ITEM	RATING	COMMENTS
8	Client Confidentiality		MAXIMUM POINT VALUE = 4
	Bidder presented material in a clear, concise and thorough manner. Material included: a.) The bidder's security measures ensure confidentiality of consumer information by all employees, service providers and volunteers. Describe what security measures are in place to address confidentiality and consumer-specific information as it relates to state and federal (HIPAA) requirements. Submit a copy of your Privacy Notice. The applicant's Privacy Notice must be HIPAA compliant and included in the SPA Appendix. Bidder's security measure meet HIPAA requirements. The bidder included a copy of the Privacy Notice. b.) The Lead Agency must ensure consumers are notified of the purpose for collecting an individual's social security number in compliance with section 119.071(5), F.S. Whenever possible, when a eCIRTS identification number is available, it is to be used for reporting purposes in lieu of a social security number. For example, when communicating information for billing or client concerns to the Area Agency on Aging of Palm Beach/Treasure Coast, Inc. the provider should use the eCIRTS identification number provided by DOEA and use encrypted transmission. Include a copy of your agency's current consumer notification which discloses the purpose for which the client's social security number is being collected in the SPA Appendix. c.) The Lead Agency is responsible for complying with Executive Order Number 11-116 and all applicable Department of Elder Affairs instructions related to the requirements to utilize the U.S. Department of Homeland Security's E-verify system to verify the employment of all new employees hired by the agency. Include a brief summary of the procedures implemented by your agency to be certain that all required employees are properly verified and determined eligible for hire through the U.S. Department of Homeland Security's E-verify system. Provider is required to maintain documentation to assure new employees hired by the agency within the contract period are eligible for employment. Verification of eligibility must be maintained for monitoring purposes by the Area Agency on Aging of Palm Beach/Treasure Coast, Inc. d.) The Lead Agency must ensure that all employees, volunteers and contractors have successfully completed the background screening process pursuant to Chapter 2010-114, Laws of Florida (L.O.F.) and Sections 430.0402 and 435.01(2) Florida Statutes and all applicable Department of Elder Affairs' Notices of Instruction. Include a brief summary of the procedures implemented by your agency to be certain that all applicable parties are properly screened and determined to have no disqualifying offenses prior to employment. Be sure to include your agency's process for notifying the Area Agency on Aging of Palm Beach/Treasure Coast, Inc. when staff/volunteers are no longer employed by your organization. Provider is required to maintain documentation to assure required direct service providers utilized by the agency have successfully completed the level 2 background screen through the Department of Elder Affairs. Verification assuring compliance must be maintained for monitoring purposes by the Area Agency on Aging of Palm Beach/Treasure Coast, Inc.		

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Item #	PROGRAM MODULE ITEM	RATING	COMMENTS
9	Disaster Preparedness		MAXIMUM POINT VALUE = 4
	The Bidder provided a clear description of the key elements of Disaster Preparedness: a.) Designation of a Disaster Coordinator and alternate. b.) Plans to ensure continuity of operations and services following a disaster. c.) Plans for contacting all at-risk consumers, on a priority basis, prior to and immediately following a disaster. d.) Plans for collecting and communicating information to the AAA on disaster response such as services delivered and unmet needs. e.) Plans for receiving referrals and conducting outreach and delivering services, before and after a disaster, to elderly persons in need who are not current consumers. f.) Plans for helping at-risk consumers register with the Special Needs Registry of the local emergency management agency. h.) Plans for delivering meals to consumers prior to and following a disaster.		
10	Volunteer Plan		MAXIMUM POINT VALUE = 4
	The Bidder included a written plan of action to assure that it maintains procedures on recruitment, training, utilization and retention of volunteers to assist with agency functions.		
11	Organizational Chart		MAXIMUM POINT VALUE = 4
	The Bidder included an organizational chart for staffing for the three programs related to their submittal (including existing and proposed positions) and illustrating the structure and relationship of positions, units, supervision and functions of the agency.		

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Item #	PROGRAM MODULE ITEM	RATING	COMMENTS
12	Description of Service Delivery (by Service)		MAXIMUM POINT VALUE = 4
	Bidder presented material in a clear, concise and thorough manner. The bidder fully completed Section II.A.12. Description of Service Delivery for each service including case management. Material included: a) Subcontractor: Will your Agency provide this service directly? ____ Yes ____ No If your Agency will subcontract this service then list all subcontractors below: Subcontractor(s) Business Name: Address: Phone Number: License Number (if applicable): Contract Start/End Date: Anticipated Monitoring Date: b.) Site Location: (Bidder may attach a list of site locations.) c.) Days And Hours Of Operation d.) The bidder described the specific activities that will be provided for each service. e.) The bidder's orientation and annual in-service training required of direct service staff providing the service, is adequate, sufficient and meets all program requirements. f.) The bidder's method of reconciling and validating service units from referral, to service delivery, to billing Area Agency on Aging of Palm Beach/Treasure Coast, Inc. is adequate, sufficient and appears to ensure accuracy. The bidder's validation and reconciliation processes and procedures includes eCIRTS service unit data entry and accuracy.		
13	Strategies and Performance Measures		MAXIMUM POINT VALUE = 4
	In keeping with the legislatively mandated requirements for performance-based budgeting, the Bidder provided implementation strategies to be utilized in keeping with the four (4) key performance measures outlined by the DOEA for the Aging Network. PERFORMANCE MEASURE 1: Adult Protective Services (APS) referrals who are in need of immediate services to prevent further harm who are served within 72 hours. PERFORMANCE MEASURE 2: New service recipients' ADL assessment scores have been maintained or improved. PERFORMANCE MEASURE 3: New service recipients' IADL assessment scores have been maintained or improved. PERFORMANCE MEASURE 4: Improving the environment score for elders with high or moderate risk environments.		
	Total Rating:		

Area Agency on Aging of Palm Beach/Treasure Coast, Inc.

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Item #	CONTRACT MODULE ITEM	Rating	Comments
1	Personnel Allocations Worksheet		MAXIMUM POINT VALUE = 4
	The Personnel Cost Flow Worksheet submitted lists all agency staff and the available hours for each staff member. The required information provided is in sufficient detail, accurate and complete. Staff time is allocated to the appropriate category.		
2	Unit Cost Worksheet		MAXIMUM POINT VALUE = 4
	The appropriate Wages & Salary information is linked from the Personnel Cost Flow Worksheet. The Unit Cost Worksheet submitted reflects all services provided by bidder and includes all costs associated with those services regardless of funding source. Costs appear to be allowable, reasonable and necessary.		
3	Supporting Budget by Program Activity - Units		MAXIMUM POINT VALUE = 4
	The Supporting Budget Schedule by Program Activity tracks to the units of service, and total cost calculated on the Unit Costing Worksheet. All calculations are correct and the form has been completed correctly.		
4	Supporting Budget by Program Activity - Match		MAXIMUM POINT VALUE = 4
	The matching funds categories (cash and in-kind) is at least 10% of the "Adjusted Budgeted Costs". All required forms to document the bidder's commitment to match the state grant are properly completed, signed by the person authorized to bind the bidder to contractual agreements, and dated.		
5	Supporting Budget by Program Activity - Unit Cost		MAXIMUM POINT VALUE = 4
	For each service the adjusted cost per unit of service is competitive and does not exceed the maximum rate allowed for the 2027/2028 contract year.		
	Total Rating:		

**Area Agency on Aging of Palm Beach/Treasure Coast, Inc.
2027/2028 Organizational Capability Evaluation Instrument**

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Item #	ORGANIZATIONAL CAPABILITY ITEM	RATING	COMMENTS
1	Audit		MAXIMUM POINT VALUE = 4 (Only a score of 0 or 4 is possible)
	A copy of the most recent audited financial statements and compliance reports package was submitted. There were no significant findings or questioned costs and all recommendations made by the independent auditor to improve internal controls were implemented. Overall financial condition is strong.		
2	Certificate of Insurance(s)		MAXIMUM POINT VALUE = 4 (Only a score of 0 or 4 is possible)
	A certificate(s) of insurance is provided. The bidder has General Liability, Professional Liability, Automobile Liability Hired/Non-Owned, Auto for Owned Vehicles, if applicable and Worker's Compensation Insurance at a minimum. Coverage at a minimum is as follows: 1M/2M General Liability; 1M/3M Professional Liability; 500K Auto Liability.		
3	Organizational Chart & Job Descriptions		MAXIMUM POINT VALUE = 4
	Bidder submitted copies of its organizational chart and all job descriptions for all positions indicated on the Personnel Allocations Worksheet . It is clear from these documents that proper lines of supervision and adequate staffing are in place.		
4	Personnel Policies Statement		MAXIMUM POINT VALUE = 4
	Bidder submitted a statement certifying its current Personnel Policies meet the minimum requirements specified in the RFP under "Personnel Standards and Employee Benefits" section.		
5	Administrative Assessment Checklist		MAXIMUM POINT VALUE = 4
	The Administrative Assessment Checklist was submitted. All items were answered. Indication is given that the agency adheres to sound fiscal and administrative standards for its operations.		
6	Certification of 60 days operating funds		MAXIMUM POINT VALUE = 4
	Certification of the availability of 60 days operating funds was provided in a signed statement.		
7	Notice(s) of Deficiency for Contract Non-compliance		MAXIMUM POINT VALUE = 4
	The Bidder submitted a statement that it has not been subject to notice(s) of deficiency for contract non-compliance for programs of similar services in the last two years, or has submitted copies of notice(s) and any Corrective Action Plan(s)including a current status of each CAP (resolved (when/how); pending/unresolved (projected resolution date).		

**Area Agency on Aging of Palm Beach/Treasure Coast, Inc.
2027/2028 Organizational Capability Evaluation Instrument**

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Item #	ORGANIZATIONAL CAPABILITY ITEM	RATING	COMMENTS
8	Documentation of Experience		MAXIMUM POINT VALUE = 4
	The Bidder forwarded documentation of experience they have had in provision of service(s) to frail elders, as well as the length of time (in years) they have worked to meet the needs of elders in the State of Florida. If the Bidder has not provided service(s) in the State of Florida, service history elsewhere is submitted as support documentation. The Bidder supplied contact person(s), name, address, telephone number of contracting agencies.		
	Transition Plan Statement		
	The Bidder forwarded a statement agreeing to forward a transition plan within 20 days of bid award.		
	Board Roster & By Laws		
	A current board roster and/or current roster of legal governing body and corporate bylaws were submitted. Board composition, in general, reflects that of the county where service is to be rendered. The bylaws provide for board oversight and involvement in all aspects of the agency.		
	Articles of Incorporation & IRS Determination		
	Copies of the articles of incorporation and the IRS determination letter granting tax exempt status (if applicable) were submitted.		
	IRS 990 or FORM 1120/1120S		
	A copy of the most recent IRS Form 990 (Not for Profit) or Form 1120/1120S (for Profit) was submitted (if applicable). Overall financial condition is strong.		
	Monitoring Reports		
	The bidder submitted the requested 2024 and 2025 monitoring reports: two fiscal and two programmatic reports. Resolution of problems identified in the report were addressed appropriately.		
	Total Rating:		

APPENDIX VIII

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RATING SUMMARY SHEET

Program Module	
Total Rating:	
Divided by Number of Questions:	13
Section Total:	
Weight	60%
Contract Module	
Total Rating:	
Divided by Number of Questions:	5
Section Total:	
Weight	30%
Organizational Capability (See note below)	
Total Rating:	
Divided by Number of Questions:	8
Section Total:	
Weight	10%

TOTAL WEIGHTED SCORE (by component)

Program Module (60%)

Contract Module (30%)

Organizational Capability (10%) _____

TOTAL WEIGHTED SCORE: