

Attachment B

Evaluation Criteria and Review and Selection Process

- Software and technology items that do not individually cost over \$1,000 (see funding restrictions).

Funding Restrictions

Grant funding cannot be used for the following purposes:

- The purchase of capital equipment. Capital equipment represents individual items purchased at a cost of \$1,000 or more with a life expectancy of more than one year.
- Revenue replacement or revenue losses experienced during the contract period.
- Duplicative expenses already covered in the known grants or contracts.
- Real property.

E. Evaluation Criteria

Each application will be evaluated against the following set of criteria.

Evaluation Criteria	Review Guidelines	Points Awarded
Organizational Eligibility	The applicant clearly meets all minimum Requirements to bid.	1
Capacity Building Plan	The applicant submitted all forms and completed a satisfactory capacity building plan and budget.	1
	Total	2 points

Applicants that meet the criteria will be recommended for funding.

Application Score	Funding Recommendations
2	Green – Recommended for Funding
1 or less	Red – Not Recommended for Funding

F. Review and Selection Process

The following is a general description of the process by which a contractor will be selected for award of a contract to perform the services described in this ITN:

1. Invitation to Negotiate (ITN) is released to prospective contractors.
2. To help ensure that all prospective contractors are treated consistently during the selection process, all questions regarding this ITN, as well as CTAC's responses to the questions will be posted on CTAC's website. A deadline for the receipt of written questions has been established (See the cover sheet of this ITN for deadline date). Persons or entities who intend to respond to such ITN by submission of a competitive proposal may wish to pose questions, objections, or requests for information, request clarification, or for an interpretation regarding terms, provisions, or requirements of the ITN. In this event, prospective contractors shall not attempt to communicate in writing, electronically or orally, with any CTAC official or employee other than the CTAC employee designated as the Project Manager. The Project Manager may be reached at the e-mail address on the ITN cover page. Prospective contractors shall not contact any other CTAC officials in an attempt to gather information regarding this ITN, or in an attempt to influence the CTAC's consideration of its proposal. All inappropriate communications with CTAC officials or employees will be forwarded to the CTAC Project Manager as well as the proposal

evaluation team. Inappropriate communications by a prospective contractor may, at the discretion of the Project Manager, constitute grounds for disqualification of that prospective contractor’s proposal. Alternatively, the evaluation team may, at its discretion, consider such inappropriate communications when evaluating and scoring proposals.

3. All proposals must be received by CTAC no later than the date and time specified on the cover sheet of this ITN. Late proposals will not be accepted and will not be reviewed.
4. The CTAC’s proposal evaluation team expects to take the following actions to determine the merits of the proposals that are submitted:
 - a. Review the proposals to determine whether they are responsive to the ITN and that they were submitted by responsible companies. Definitions for the terms “responsible” and “responsive” are provided below:
 - b. **Responsible** contractors are those contractors that meet CTAC’s standards with respect to a reasonable expectation that the contractor has the management, technical, financial, equipment, and human resources available to ensure adequate performance of the work described in the solicitation. To be considered responsible, contractors shall also be free of past instances of the material breach of a CTAC contract, free of a conviction (or convictions) for bribery, fraud, conflict of interest, violation of environmental laws, or for convictions for other crimes reflecting poorly on the contractor’s integrity, for the last five (5) years. Contractors that fail to meet the minimum qualifications stated in the solicitation or that have, in the past three (3) years, been debarred or suspended or had a contract terminated for default by any government agency are also determined to be not responsible.
 - c. **Responsive** proposals are those proposals that satisfactorily address all requirements specified in the ITN. Because proposals, unlike bids, are subject to negotiation, certain omissions or variances may be resolved through negotiations to make the proposal responsive. An example of an omission or variance that can be resolved is a proposed period of performance that does not result in completion of the work within the required timeframe. If negotiation with the contractor results in an adjustment to the period of performance matching the required timeframe, the proposal then may be deemed to be responsive.
 - d. Should it be determined that changes are required to the solicitation provisions or any other changes need to be made that might affect the proposed prices of other features of the proposals, all responsible companies, or all the responsible companies in the competitive range, may be requested to submit a best and final offer (BAFO). In this event, the CTAC shall evaluate the BAFOs in lieu of the original proposals.
5. **Review.** Proposals are independently reviewed and scored by a team of reviewers that may include Trust staff, experts in the field and trained volunteers. Using the evaluation criteria, reviewers assess the soundness and completeness of each proposal as well as the vendor’s capacity to effectively deliver what is proposed. Subjectively rated criteria will be scored on a scale of 0-2 according to the scoring scheme below:

SCORING RANGE	SCORING DESCRIPTION
2	Meets all and exceeds several of CTAC’s requirements
0-1	Does not meet minimum CTAC requirements

6. **Interview/site visit.** At the CTAC's discretion, publicly noticed interviews and/or site visits may be conducted at either the vendor's site or the CTAC's offices. Members of the public may attend interviews and/or site visits as observers. The interview/site visit review team may include Trust staff, experts in the field and trained volunteers. The purpose of the interview/site visit is to confirm the applicant meets all minimum requirements to bid and to negotiate terms of the proposed capacity building plan, including funding amounts.

7. **Staff recommendations.** Taking into consideration the above review process results, the Executive Director of the CTAC develops a recommendation. When considering Direct Community Services, consideration is also given to factors such as alignment with the CTAC's priority investment areas, effective and economical distribution of funding across Alachua County and/or in underserved geographic areas/populations in Alachua County (if applicable), minimizing duplication of efforts, and reasonable program costs for the services and outcomes proposed. Based on consideration of all of the above factors, a recommendation is made to the CTAC Board.
8. **Board review and award.** Executive Director recommendations are reviewed and considered by the CTAC Board at a publicly noticed meeting. Applicants are encouraged to attend these meetings. CTAC Board approval of the recommendations will allow the contract negotiation process to begin, in an amount not to exceed the CTAC Board's approved award. Negotiation may include reframing the proposed services, and adjusting the total allocation, budget, or any other changes necessary to comply with the requirements of the solicitation and resulting contract. Any future amendments, extensions or modifications to the contract that would exceed the CTAC Board's approved award amount or the approved contracting period require further Board approval.
9. **Protests.** Any actual or prospective bidder or proposer, who is allegedly aggrieved in connection with the issuance of a bid or proposal package or pending award of a contract, may protest the decision by following the procedure below.
 - a. **Posting.** The Trust shall publicly post the award on the Trust's website within three (3) full business days after the Board's award decision has been made. All bidders or proposers will be sent an e-mail with the notice of award to the e-mail address provided in the bid or proposal.
 - b. **Requirements to Protest.**
 - i. A formal written protest must be filed no later than 5:00 PM EST, on the fifth business day after the notice of award has been posted. The formal written protest shall identify the protesting party and the solicitation involved; include a clear statement of the grounds on which the protest is based; refer to the statutes, laws, ordinances, applicable section(s) of the solicitation or Board policy, or other legal authorities which the protesting party deems applicable to such grounds; and specifically request the relief to which the protesting party deems itself entitled by application of such authorities to such grounds.
 - ii. A formal written protest is considered filed when the Executive Director receives it and it is date-stamped by the CTAC. Accordingly, a protest is not timely filed unless it is received within the time specified above. Failure to file a formal written protest within the time period specified shall constitute a waiver of the right to protest and result in relinquishment of all rights to protest by the actual or prospective Applicant.
 - c. **Sole Remedy.** These procedures shall be the sole remedy for challenging an award of bid or proposal. Proposers are prohibited from attempts to influence, persuade, or promote a protest through any other channels or means.
 - d. **Authority to Resolve.** The Executive Director shall resolve the protest in accordance with the terms of the bid or proposal and shall render a written decision to the protesting party no later than 5:00 PM EST on the fifth business day after the filing of the protest.
 - e. **Review of Executive Director's Decision.**
 - i. The protesting party may request a review of the Executive Director's decision by the CTAC Board by delivering a written request for review of the decision to the Executive Director by 5:00 PM EST on the fifth business day after the date of the written decision. The written notice shall include any written or physical materials, objects, statements, and arguments, which the Applicant deems relevant to the issues raised in the request for review.
 - ii. The CTAC Board will consider the request for review at the next regularly scheduled CTAC Board meeting after the request is received. It is within the CTAC Board's discretion whether to allow testimony or argument from the protesting party at the CTAC Board meeting. If it is determined by majority vote of CTAC Board members

present at the meeting that the award is in violation of law or the regulations and internal procedures of the Trust or any another applicable authority, the Board shall cancel or revise the award as deemed appropriate within three (3) business days after the Board meeting.

- iii. If it is determined by majority vote of CTAC Board members present at the meeting that the award should be upheld, the CTAC Board shall direct staff to notify the protesting party in writing of the Board decision with a copy furnished to all substantially affected persons or businesses within three (3) business days of the CTAC Board meeting. The decision shall be final and conclusive.

- f. **Stay of Procurement during Protests.** The decision to stay a procurement during protests shall be at the sole discretion of the Executive Director.

10. The CTAC reserves the right to:

- Reject any or all submittals
- Request clarification of any submitted information
- Waive any informalities or irregularities in any response
- Not enter into any contract
- Not select any firm
- Cancel this process at any time
- Amend this process at any time
- Interview firms prior to award
- Enter into negotiations with one or more firms, or request a best and final offer (BAFO)
- Award more than one contract if it is in the best interests of the CTAC
- Issue similar solicitations in the future
- Request additional information from prospective contractors

SECTION 3: SUBMISSION INSTRUCTIONS

A. Submission Checklist

The response to this ITN shall consist of:

- A completed **FORM 1 - Prospective Contractor Certification** (included in this solicitation).
- A completed **FORM 2 - Organizational Information** (included in this solicitation).
- A completed **FORM 3 - Capacity Building Self-Assessment Tool** (included in this solicitation).
- A completed **FORM 4 - Capacity Building Plan and Budget** (included in this solicitation).
- Additional Documents Required for Submission
 - Proof of Corporate Status and Legal Address (note: from SunBiz)
 - Proof of OST program revenue from most recent fiscal year (such as tax documents IRS 990, audited financial statements, balance sheets, Philanthropy hub profiles etc.)
 - Copy of IRS 501(c)(3) Determination Letter (if applicable)

All completed application shall be submitted via email Procurement@childrenstrustofalachuacounty.us by deadline. Emails should include the following details:

- Subject Line: [Organization Name] – Youth Development Capacity Building Collaborative
- PDF attachments above forms must be included in a single email to be considered completed. Please clearly label all application materials with form name and organization.

B. Application