



**FRCC Planning Committee  
Process to Identify, Retain and  
Manage Independent  
Consultants**

**FRCC-MS-PL-019**

**Effective Date: 10/30/2015**

**Version: 2**

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## 1.0 Purpose

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Establish and document an FRCC process to assist in the identification, retention and management of qualified consultants in support of Order 1000 tasks and other tasks deemed appropriate by the FRCC Planning Committee (PC).

## 2.0 Terms and Definitions

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### 2.1 Cost Effective or Efficient Regional Transmission Solutions (CEERTS)

As defined by the FRCC Regional Transmission Planning Process (RTPP)

## 3.0 Background

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FERC Order 1000 intends to achieve two primary objectives: (1) ensure that transmission planning processes at the regional level consider and evaluate, on a non-discriminatory basis, possible transmission alternatives and produce a transmission plan that can meet transmission needs more efficiently and cost-effectively; and (2) ensure that the costs of transmission solutions chosen to meet regional transmission needs are allocated fairly to those who receive benefits from them. In addition, FERC Order 1000 addresses interregional coordination and cost allocation, to achieve the same objectives with respect to possible transmission solutions that may be located in a neighboring transmission planning region.

In order to meet FERC Order 1000 requirements, FRCC entities have proposed changes to the existing FRCC Regional Transmission Planning Process intended to meet the requirements of Order 1000. These proposed changes require identifying and retaining independent consultants for the purpose of qualifying transmission developers and performing CEERTS project analysis as needed during the FRCC Regional Transmission Planning Process.

From time to time, the FRCC PC may require the assistance of a consultant for other services not related to the RTPP. Consultants qualified under this process can be utilized by the PC and FRCC staff for those services for which they have been qualified, selected and have a current Master Professional Services Agreement (MPSA).

## 4.0 Applicability

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### 4.1 FRCC Planning Committee (PC)

### 4.2 Competitive Selection Task Force (CSTF)

### 4.3 FRCC Planning and Legal staff

## 5.0 Responsibilities

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### 5.1 FRCC PC

The FRCC PC is responsible for initiating this process to identify, retain and manage qualified

consultants; nominating and selecting CSTF members, and reviewing and updating of this document.

## 5.2 CSTF

The CSTF is responsible for overseeing the execution of steps 6.1 – 6.8 of this process.

## 5.3 FRCC Staff

The FRCC Staff is responsible for managing Request for Qualification (RFQ) documents, administrating final contracts with consultants, and management of consultants.

## 6.0 Procedural Steps

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This process is expected to be repeated every three years or as required based on the current needs.

### 6.1 CSTF Develops RFQ and Evaluation Criteria

- 6.1.1 CSTF members, as selected by the PC, take appropriate actions to develop detail associated with the PC request to develop an RFQ and Evaluation Criteria for a specific task or sets of tasks.
- 6.1.2 CSTF will update/modify Attachments B & C as needed to accurately reflect the work to be performed by the successful consultant.
- 6.1.3 FRCC Staff will coordinate the legal review of the updated RFQ document and Evaluation Criteria.

### 6.2 PC Reviews and Approves RFQ and Evaluation Criteria.

- 6.2.1 FRCC Staff will coordinate internally to ensure the RFQ document and Evaluation Criteria are included in the PC meeting agenda for approval.
- 6.2.2 If the PC does not approve the RFQ and Evaluation Criteria, the CSTF will consider and discuss any concerns expressed by the PC and will make conforming changes to the RFQ and Evaluation Criteria documents and repeat step 6.1.1.
- 6.2.3 CSTF will gather a list of firms for consideration as potential bidders from different sources (i.e. PC Members, FRCC Staff, etc.). The comprehensive list of potential bidders will be provided to the PC and FRCC Staff.

### 6.3 Public Announcement of RFQ

- 6.3.1 FRCC Staff will post the approved RFQ documents on the FRCC Website (location to be determined).

### 6.4 Bidder Questions

- 6.4.1 Bidder questions received within the timeframe specified in the RFQ package will be reviewed by FRCC Staff.
- 6.4.2 FRCC Staff can respond directly to the bidder regarding general type questions. Other specific type questions will be provided to the CSTF via email and a conference call will be scheduled

to review questions received and develop responses.

## **6.5 Receive Qualifications**

6.5.1 FRCC Staff will collect all RFQ responses from bidders and provide them to the CSTF.

## **6.6 CSTF Reviews Responses to RFQ**

6.6.1 CSTF will schedule any necessary meetings and/or conference calls to review all responses to the RFQ.

6.6.2 CSTF will review and discuss all RFQ responses and develop a score for each bidder based on the Evaluation Criteria

## **6.7 CSTF Ranks RFQ Bidders**

6.7.1 CSTF will score and rank all RFQ bidders.

6.7.2 CSTF will finalize the bidder rankings and select at least three bidders for the short list that will be provided to the PC.

## **6.8 PC Reviews Short List of Bidders**

6.8.1 CSTF will present the short list of bidders to the PC for review and discussion at the earliest PC meeting available.

6.8.2 If the PC accepts the short list of bidders provided by the CSTF, then the short list of bidders will be provided to FRCC Staff for legal review.

6.8.3 If the PC does not accept the short list of bidders provided by the CSTF, then return to step 6.6.2.

## **6.9 FRCC Legal Review**

6.9.1 FRCC Legal Staff will review the terms and conditions provided by the bidders.

## **6.10 FRCC Staff Negotiates Final Professional Services Agreement(s)**

6.10.1 FRCC staff negotiates final contracts including terms and conditions. The FRCC PC may utilize selected consultants for any future assignments for which those consultants were qualified during the RFQ process.

6.10.2 Master Professional Services Agreements with Task Authorization templates are the preferred contract type but others will be considered on a specific work-assignment basis.

## **6.11 FRCC Staff Management of Retained Consultants**

### **6.11.1 Management Conflicts of Interest**

Consultants are responsible for identifying sources of disclosed existing or potential conflicts of interest (“COI”) at any time they may arise, including, at minimum, during the Request for Qualifications process and each time FRCC Staff sends a scope request.

FRCC Staff will review disclosed COI for each consultant and will send scope requests to

those consultants without disclosed COI issues.

If no consultants that have been qualified and retained (signed MPSAs) are without disclosed COI issues, FRCC Staff will review COI details with FRCC Legal and, if needed, with the Planning Committee to determine whether alternative methods of management of the potential COI risks can be achieved.

Should FRCC Staff determine that the only course of action includes use of a consultant that has a disclosed COI risk, that decision will be subject to a PC vote, as the PC must approve proceeding with a consultant with a disclosed COI. Upon approval, FRCC Staff will provide the PC with an informational briefing regarding how they intend to address, mitigate, and/or resolve the conflict. Nothing in this process shall be interpreted to restrict FRCC Staff from resolving and/or addressing disclosed COIs as they deem necessary.

#### **6.11.2 Competitive Pricing**

Whenever possible, FRCC Staff shall seek to request scope and pricing from multiple qualified consultants. This will allow for competitive pricing on any work requested.

## **7.0 References**

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### **7.1 FRCC Regional Transmission Planning Process (RTPP)**

## **8.0 Attachments**

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### **8.1 Attachment A – Independent Consultant Selection Process Map**

### **8.2 Attachment B – Electric Transmission Engineering and Consulting Services – RFQ Template**

### **8.3 Attachment C – RFQ Evaluation Criteria**

### **8.4 Attachment D – Action Plan Timeline**

## 9.0 Revision History

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CURRENT REVISION LOG			
Date	Revision Number	Description of Change	Pages Affected
10/30/2014	0	New Procedure	All
04/07/2015	1	Placed document in new template and updated Attachment C with new approved Bid Evaluation Matrix Template	Attachment C
09/18/2015	2	Added section 6.11 regarding Management of retained consultants. Updated Attachments A and C. Various minor updates to body text.	6.11, Attachments A & C

## 10.0 FRCC Disclaimer

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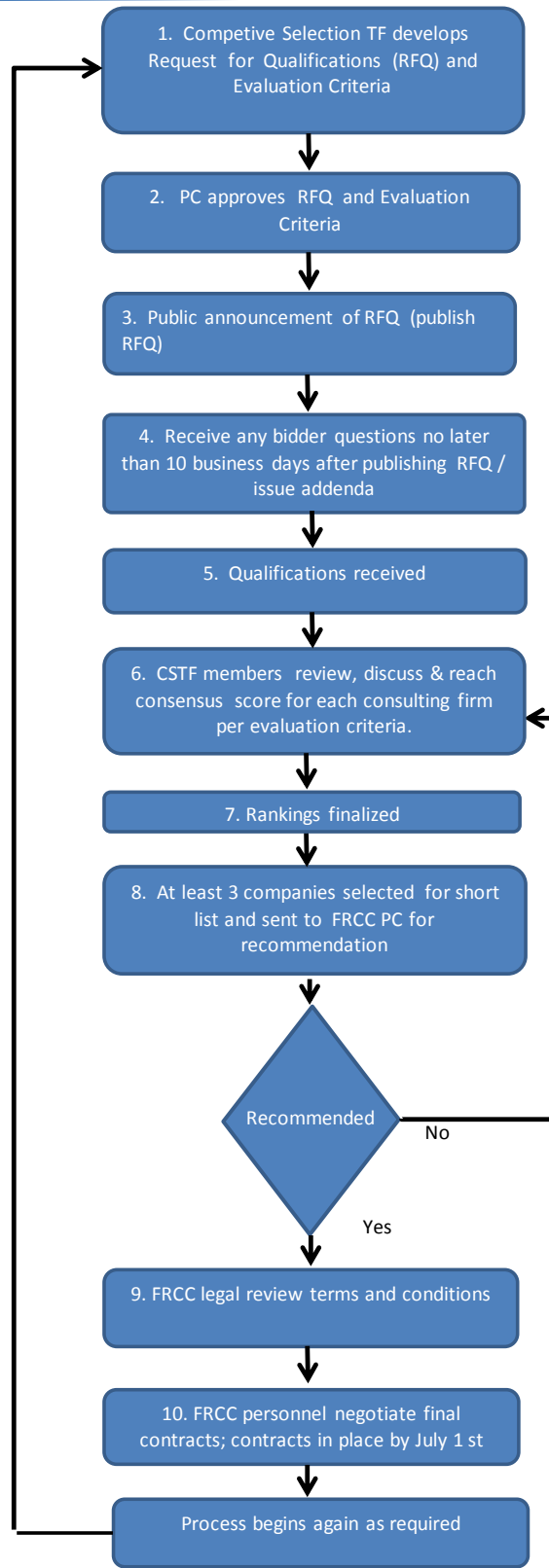
This supporting document may explain or facilitate implementation of one or more NERC Reliability Standard requirements but does not contain any explicit mandatory requirements subject to compliance enforcement. The requirements and procedures described herein are not intended to be fully inclusive of all activities that may support compliance to a specific NERC Reliability Standard referenced or implied within the procedure.

The FRCC committees may revise or terminate this document at any time at its discretion without notice. However, every effort will be made by the FRCC committees to update this document and inform its users of changes as soon as practicable. Nevertheless, it is the FRCC entities' and other users' responsibility to ensure the most recent version of this document is being used in conjunction with other applicable procedures, including, but not limited to, the applicable NERC Reliability Standards as they may be revised from time to time.

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## Attachment A: Independent Consultant Process Map



**Attachment B:****Electric Transmission Engineering and Consulting Services - RFQ Template**

# Request for Qualifications

For:

# Electric Transmission Engineering and Consulting Services (TEMPLATE)

**RFQ Issue Date: DATE**

**RFQ Response to FRCC Date: DATE**

## Electric Transmission, Engineering and Consulting Services

## Request for Qualifications

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***ELECTRIC TRANSMISSION ENGINEERING AND CONSULTING SERVICES RFQ***

**The purpose of this document is to provide the Competitive Selection Task Force (CSTF) an RFQ template that will expedite the issuance of the RFQ to the prospective bidders.**

**The CSTF will need to review all qualification and evaluation criteria to ensure the respondents can meet the scope of work required by the FRCC and listed in the Regional Transmission Planning Process. The CSTF will also need to have the final documents reviewed and finalized by FRCC legal staff prior to issuance.**

## **I. Overview**

The Florida Reliability Coordinating Council, Inc. (FRCC) is requesting qualifications from firms to provide FRCC with electric transmission engineering and consulting services. The selected firms will be considered capable of performing consulting services on a task authorization basis. An FRCC task force consisting of appointed representatives from FRCC members (Task Force) will review the top candidates and perform the functions necessary to provide a final recommendation to the FRCC Planning Committee and the FRCC for consideration and selection.

## **II. Introduction**

The Florida Reliability Coordinating Council (FRCC) is a Florida not-for-profit corporation that was formed in 1996 and is one of the eight regions of the North American Electric Reliability Corporation (NERC). The FRCC's mission is to ensure and enhance the reliability and adequacy of the Bulk Electric System (BES) in Florida now and into the future. The FRCC's Web site is [www.frc.com](http://www.frc.com). The FRCC Region is comprised of all of Florida east of the Apalachicola River. Florida's unique geography and its highly integrated transmission system coupled with its single interface boundary to the rest of the Eastern Interconnection required the development of a reliability focus in the FRCC Region. Membership in the FRCC's Regional Entity Division is open to any entity, without cost, that has a material interest in the reliability of the BES in the FRCC Region. Currently there are 70 Registered Entities within the FRCC Region. A comprehensive list of Registered Entities is listed in Appendix A. The FRCC is governed by a balanced stakeholder Board of Directors, and accomplishes its activities through qualified professional staff and standing committees, which also have balanced stakeholder governance.

The FRCC provides the statutory functions and services for the FRCC Region through its Regional Entity Division. Non-statutory services for the FRCC Region are provided through its Member Services Division. This divisional structure is an efficient and effective means of clearly separating statutory and non-statutory activities and related funding for each. The revised FRCC Bylaws, creating this divisional structure, were first approved by the Federal Energy Regulatory Commission ("FERC") on March 21, 2008.

The FRCC Regional Entity Division works to enhance the reliability of the BES in the FRCC Region pursuant to the approved Regional Delegation Agreement with NERC, as the Electric Reliability Organization ("ERO"), under the authority of the FERC. The functions performed by the FRCC Regional Entity Division include regional reliability standards development, compliance monitoring and enforcement of reliability standards, reliability assessment and performance analysis, event analysis and reliability improvement, training and education, situation awareness and infrastructure security.

The Member Services division of the FRCC provides, coordinates and administers a variety of services relating to the reliable planning and operation of the Bulk Electric System (BES) within the FRCC Region which includes peninsular Florida east of the Apalachicola River. These services are carried out by the FRCC Planning Committee (PC) and the FRCC Operating Committee (OC), various subcommittees, task forces and working groups, as well as FRCC Staff. The Members' Services objectives are to ensure the reliability of the BES within the FRCC Region and to coordinate, plan, operate and maintain reliable bulk electricity supply within the FRCC region.

### III. Qualification Requirements

Qualifications for electric transmission engineering and consulting services must include the following:

- An overview of your firm's experience in electric transmission and engineering consulting services;
- Qualifications, including specific experience with the electric utility industry and not-for-profit entities;
- Biographical sketches of the principal(s), task leads, and staff who would be assigned to this activity;
- Firm's proposed rate table, and any payment provisions requested. Specify at minimum how expenses will be charged;
- A list of client references and contact information. References may be contacted during evaluation;
- A list of any current clients that are FRCC Registered Entities as listed in Appendix A with:
  - a description of the type of work associated with the current project(s) for that client
  - if any such project(s) include(s) litigation/arbitration support services related to a matter in which one of the other FRCC Registered Entities shown in Appendix A are a party or could become a party;
  - if any such services include design engineering or consulting services for or related to a project which may qualify as a CEERTs project as defined in the FRCC Regional Transmission Planning Process
- Proof of liability insurance and amount;
- Statement attesting that all information provided in your proposal to FRCC is true and accurate to the best of your knowledge; and
- Procedures for managing and identifying existing or future Conflict of Interest issues

### Statement of Need

FRCC is seeking responses from firms with expertise in electric transmission engineering and consulting services. The primary objective of this RFQ is to establish a preferred list of firms from which FRCC will select a firm(s) to conduct the electric transmission and engineering consulting services on an on-going, as needed basis as part of FRCC's Biennial Transmission Planning Process.

### IV. Nature Of The Electric Transmission and Engineering Consulting Services

The FRCC is requesting qualifications from firms interested in entering into a Professional Services Agreement for electric transmission and engineering consulting services. The term of the Agreement will be three (3) years with two (2) additional one year period options to renew. The type of work to be performed under such agreement will be assigned on a "task authorization" basis, and will include any engineering/technical/financial consulting services associated as described in the FRCC "Regional Transmission Planning Process" and additionally may include NERC standards that require regional analysis such as the proposed TPL-007 and CIP-014 standards or other future assignments for services for which the consultant is qualified through this RFQ process. FRCC may elect to select different firms to conduct various parts of the proposed scope of work, depending upon the qualifications received.

### Summary of the Requested Services from the Consulting Firm

The Competitive Selection Task Force intends to refer its recommendation(s) to the FRCC PC upon completion of the process. FRCC will engage a consulting firm(s) from the recommended list to provide one or more electric transmission and engineering and consulting services below on a “task authorization” basis:

- Technical analysis for the purpose of developing or validating (provided) Cost Effective and/or Efficient Regional Transmission (CEERTS) project information as outlined in FRCC’s “Regional Transmission Planning Process” document.
- CEERTS Project Cost-benefit analysis as outlined in FRCC’s “Regional Transmission Planning Process” document.
- Assist in evaluating the qualifications of potential developers as outlined in FRCC’s “Regional Transmission Planning Process” document.
- Assessments/studies related to NERC reliability standards.
- Other electric power engineering and transmission consulting related services as required.

### Scoring and Evaluation

FRCC will use the "Selection Criteria" listed below to evaluate the Respondents Proposals. FRCC may make its Award decision based solely upon the information submitted in the Proposals. FRCC may also request firms make presentations to representatives of FRCC. It is always in the best interest of the Firm to provide informative, concise, well-organized technical and business information relative to the Work.

### Professional Staff Experience (40 Points)

Firm shall provide resumes of the professional staff to be assigned to perform the Work. The resumes provided shall identify the Project Manager, Team Leads, and associated Staff responsible for the majority of the proposed services (collectively, the "Team Members"). Note, the Project Manager must be a direct employee of the Firm submitting the Proposal and not a sub-consultant. If a sub-consultant is proposed, the submittal must clearly identify which staff are associated with the sub-consultant and which services the sub-consultant will provide to FRCC. Persons whose resumes are submitted as a Team Member must perform the majority of the services. Should the Firm desire to utilize alternate Team Members, these resumes shall be transmitted to FRCC for approval prior to services being rendered.

At a minimum, each resume shall present the Team Member's name, title, years of service with Firm, applicable professional registrations, education, and work experience. Clearly identify the Team Member's role in potential Task Authorizations and ensure the title or a project specific title identifies the Team Member's billing class/rate. Resumes shall also identify any specialty or technical process expertise. Each resume shall be no more than two (2) pages in length, single sided, and on 8.5" by 11" sized paper.

Finally, the Firm shall provide an organizational chart delineating Firm's personnel responsibilities and functions associated with the Work which utilizes the roles identified for the Team Members.

### Firm Experience (35 Points)

Firm shall provide the following:

- Past Firm and Project Team experience / performance that can demonstrate successful management/engineering in regards to the following areas of expertise. Provide the number of clients served within the past 5 years for each service.
  1. Financial analysis of electric utility capital projects.

2. Engineering design, cost estimating, project management and Independent Engineering analysis of electric transmission lines, substations, and/or Flexible AC Transmission projects.
3. NERC Transmission Planning Standards.
4. Other applicable examples applying to services as listed in FRCC's "Regional Transmission Planning Process" document.

Firm's response to this section should be limited to no more than ten (10) pages, 1-sided, single-spaced. Please use your own form for this section. Responses that are longer than ten (10) pages will not be evaluated after page ten.

### **Financial Responsibility (10 Points)**

At minimum, Firm shall provide the following information:

- Form of business (i.e., proprietorship, partnership, corporation);
- Years in business;
- Revenues of the Firm in 2013.
- Firms Credit Rating [Not sure how to word this but we need a statement of credit rating or something (pretty sure that is typical)]

### **Internal Processes / Procedures (20 Points)**

At minimum, Firm shall provide the following information:

- Plan to manage Staff Workload & Project Schedules
- Plan to meet Budget Requirements
- Procedure to manage and identify existing and future Conflicts of Interest
- Plan to provide Quality Assurance

### ***Conflict Of Interest/Statement of Non-Collusion***

All respondents must disclose with their bid the name of any officer, director, or agent who is also an employee of the FRCC or FRCC member as listed in Appendix A. Further, all respondents must disclose the name of any employee of FRCC or FRCC member who owns, directly or indirectly, any interest of the respondent's firm or any of its branches.

The respondent shall certify that he/she has not, either directly or indirectly, entered into any agreement, participated in any collusion, or otherwise taken any action in restraint of free competitive bidding in connection with the bid and that the respondent is not financially interested in, or otherwise affiliated in a business way with any other respondent.

The respondent shall have disclosed any conflict of interest or on-going relationships with any of the Registered Entities as listed in Appendix A within the past two years from the date this Request. All respondents shall also submit their process for identifying existing or future conflicts of interest and their process for reporting and managing the conflict.

## **V. Addenda**

It is the respondent's responsibility to contact the FRCC prior to submitting a proposal to ascertain if any addenda have been issued, to obtain all such addenda and return executed addenda with the submittal.

The failure of a respondent to submit acknowledgement of any addenda may be considered an irregularity and may be cause for rejection of the submittal.

## VI. Instructions for Submitting Qualifications

Responses and all related materials must be received by **TIME** (a.m. or p.m.) on **DATE**. Responses may be delivered to FRCC:

Florida Reliability Coordinating Council, Inc.  
Vince Ordax – Director of Planning  
3000 Bayport Drive, Suite 600  
Tampa, FL 33607-8407  
[FRCC\\_PA@frc.com](mailto:FRCC_PA@frc.com)

The FRCC at its sole discretion reserves the right to waive technicalities or irregularities, to reject any or all submittals, and/or to select those submittals which are in the best interest of the FRCC. The selection of these submittals, if made, may be based on various considerations, including without limitation; Respondent's experience and/or qualifications, past experience, administrative cost, standardization, technical evaluation and oral and/or written presentations as required. The FRCC may seek Professional Service Agreements with one (1) or more of the selected respondents. The FRCC reserves the right to award Task Authorizations for all or part of the Services outlined in FRCC's "Regional Transmission Planning Process" to one or more of these respondents. The submittals selected will be the most responsive to the FRCC needs in the judgment of the FRCC.

## VII. Response Package

The following items must be included in the response and packaged in a box or envelope clearly marked **Electric Transmission and Engineering Consulting Services**.

Responses should provide a straightforward, concise description of the Respondent's capabilities to satisfy the requirements of the RFQ. Marketing and sales type information should be excluded. All parts, pages, figures, and tables should be numbered and clearly labeled.

The package should include **NUMBER OF COPIES NEEDED** (**numerical number**) complete printed or electronic copies of the response. All electronic files should be submitted in unprotected PDF or Word format.

## VIII. Questions/Additional Information

The respondent may submit questions and/or requests for additional information via email to FRCC at the following email address [FRCC\\_PA@frc.com](mailto:FRCC_PA@frc.com). Questions to clarify the RFQ document and any related attachments must be received on or before **DATE & TIME a.m. /p.m.** **[10 business days typical]**. FRCC will publish all questions and all FRCC answers to all respondents within 15 business days of the RFQ issue date.



### Attachment C: RFQ Evaluation Criteria

Evaluation Criteria Template					
Specification : Template RFQ		Firm: Joe Smith Consulting		Evaluator: John Doe	
Professional Staff Experience (40 Points)	PROFESSIONAL STAFF EXPERIENCE				
	Depth of Experience		Subjective -- 0-40 points max		
	Resume - Project Managers / Task Leads	Maximum Number of Points	Score		Totals
	Team Leadership with relative experience	15	9		9
	Team Support with relative experience	15	7		7
	Staff Depth	10	5		5
	<b>Totals - Professional Staff Experience:</b>				<b>TOTAL</b>
Company Experience (35 points)	COMPANY EXPERIENCE: Select Scoring Method - (1)Average of Topical Areas or (2)Max By Individual Topical Area				
	Scoring Method (1 or 2):	1	Select only one box per row. Fill in the selected score from the available range. Fill in Rows based on Section IV of RFQ "Summary of the Requested Services". Select Scoring Method after initial topical area scores have been entered.		
	Past Company and Project Team experience / performance that can demonstrate successful management/engineering in regards to the following areas of expertise:	Very Good (21-35 points)	Good (6-20 points)	Average/ No Information (0-5 points)	Individual Totals
	1. Review of Project Financing/Financial Analysis of electric utility capital projects	33			33
	2. Review of Utility engineering and project management practices.	30			30
3. Review of utility financial statements, annual reports, credit ratings, et.al.		17		17	
<b>Total Score (Avg or Max) - Company Experience</b>					26.66666667
Financial Responsibility (10 points)	FINANCIAL RESPONSIBILITY				
	Years in Business (3 points)	> 10 yrs (3 points)	5 to 10 yrs (2 points)	< 5 yrs (1 point)	3
	Revenues in 2013 (3 points)	>\$10M (3 points)	\$500,000 - \$10M (2 points)	< \$500,000 (0 points)	3
	Financial Metrics (4 points)	Credit Rating, Bankruptcy, Outsanding Liens, etc.			4
	<b>Total Score - Financial Responsibility</b>				10
Internal Processes / Procedures (20 points)	Internal Processes / Procedures				
	Plan to manage Staff Workload & Project Schedules	Very Good (4-5 points)	Good (2-3 points)	Average/ No Information (0-1 points)	4
	Plan to provide Quality Assurance	Very Good (4-5 points)	Good (2-3 points)	Average/ No Information (0-1 points)	5
	Procedure to handle existing and future Conflict of Interest	Very Good (4-5 points)	Good (2-3 points)	Average/ No Information (0-1 points)	0
	Plan to meet Budget Requirements	Very Good (4-5 points)	Good (2-3 points)	Average/ No Information (0-1 points)	0
<b>Total Score - Internal Processes/Procedures</b>					9
				<b>TOTAL SCORE</b>	<b>66.67</b>
Reviewer Comments:					
List Bidder/Respondent Exceptions:					

# Attachment D: Action Plan Timeline

