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| RATING TEAM WORKSHEET | |
| **EVALUATOR: S Lassiter**  **OFFEROR: PHPK**  **SOLICITATION TITLE:** | ***🞏 INITIAL EVALUATION***  🗹 ***FINAL EVALUATION***  ***(Check Applicable Box)*** |
| **SCORING CRITERIA:**  BLUE - SUPERIOR (Numeric Score 4.6 to 5.0)  Offeror’s proposal demonstrates excellent understanding of requirements, and significantly exceeds JLab’s minimum capability and/or performance standards. Proposal has exceptional strengths that provide a high degree of benefit to JLab and/or considerably less than average risk.  GREEN - NOTABLY ABOVE AVERAGE (Numeric Score 3.6 to 4.5)  Offeror’s proposal demonstrates good understanding of requirements, and exceeds JLab’s minimum capability and/or performance standards. Proposal has one or more strengths that provide some degree of benefit to JLab; and there are few, if any, minor deficiencies that result in less than average risk.  WHITE – AVERAGE (Numeric Score 2.6 to 3.5)  Offeror’s proposal demonstrates acceptable understanding of requirements, and meets JLab’s minimum capability and/or performance standards. The proposal provides few or no strengths; and may have minor deficiencies that result in an average risk to satisfactory performance.  YELLOW – MARGINAL (Numeric Score 1.6 to 2.5)  Offeror’s proposal demonstrates shallow understanding of requirements, and only marginally meets capability and/or performance standards. Proposal has a number of minor deficiencies, or one or more major deficiencies that could impact offeror’s capability to provide acceptable performance, and cause JLab to undertake considerable risk.  RED – POOR (Numeric Score 1.0 to 1.5)  Offeror’s proposal fails to meet capability and/or performance standards. Proposal has a gross deficiency (ies) or numerous other deficiencies which causes the Offeror’s proposal to be non-compliant in one or more area(s) and could cause JLab to undertake unreasonably high risks.  **NOTES:**   1. **1. SCORE MUST BE SUFFICIENTLY JUSTIFIED BY THE COMMENTS UNDER STRENGTHS, WEAKNESSES, AND RISKS. COMMENTS SHOULD BE BASED ON INFORMATION THAT HAS BEEN VALIDATED.** 2. **2. FACTORS ARE LISTED IN DESCENDING ORDER OF IMPORTANCE.**   **\*\*\*\*\*\*\*\***  **FACTOR 1: QUALIFICATIONS: EXPERIENCE AND PAST PERFORMANCE (SUBFACTORS ARE OF EQUAL IMPORTANCE) –**  Offeror’s demonstrated current and previous corporate, key management and technical personnel experience and certifications, past performance and qualifications directly related to satisfactory performance of contracts for fabricating similar equipment.  **FACTOR 1 OVERALL RATING**  o BLUE (Superior) 🗹Green (Notably Above Average) 🞏 White (Average) o YELLOW (Marginal) o RED (Poor)  **Subfactor 1: Past Experience.** Experience is the opportunity to learn by doing. Jefferson Lab will evaluate the offeror’s experience on the basis of its breadth, its depth, and its relevance to the work that will be required under the prospective subcontract. Jefferson Lab will consider the extent to which the offeror’s key personnel have worked together in the past. Also the organizational experience of the offeror’s proposed key subcontractors will be evaluated.  **RATING**  o BLUE (Superior) 🗹 Green (Notably Above Average) 🞏 White (Average) o YELLOW (Marginal) o RED (Poor)  NARRATIVE:   * **Strengths - Essential Employees have 20 years or more experience in cryogenics. They have partnership with Mid-Ohio for machining.** * **Weakness** - * **Risks** -   **Subfactor 2: Past Performance.** Past performance is a measure of the degree to which an offeror satisfied its customers in the past and complied with Federal, state, and local regulations. Jefferson Lab will contact some of the offeror’s customers to ask whether or not they believe: (1) that the offeror was capable, efficient, and effective; (2) that the offeror’s performance conformed to the terms and conditions of its contract; (3) that the offeror was reasonable and cooperative during performance; and (4) that the offeror was committed to customer satisfaction. In evaluating past performance, Jefferson Lab may also contact other sources of information including, but not limited to: Federal, state, and local government agencies, better business bureaus, published media, and electronic data bases. Jefferson Lab will only evaluate the offeror’s organizational past performance on the basis of the personal past performance if that performance is considered relevant to this effort. Jefferson Lab may also evaluate the organizational past performance of the offeror’s proposed key subcontractors.  **RATING**  o BLUE (Superior) 🗹 Green (Notably Above Average) 🞏 White (Average) o YELLOW (Marginal) o RED (Poor)  NARRATIVE:   * **Strengths - PHPK has had many successful projects with JLAB and other DOE labs.** * **Weakness** - * **Risks** - | |
| **Relevancy for the purposes of evaluating the factors in paragraphs (1) and (2) above shall generally be defined as experience and past performance in the areas listed below:**  1. Corporate and Key Personnel experience and past performance in the production of Cryogenic Transfer Lines of a similar type.  2. Written confirmation of useful contributions that the company and/or Key Personnel have made in the past to the production of Cryogenic Transfer Lines or related technologies.  **~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~**  **FACTOR 2: RESOURCES: FACILITIES, PLANNING, AND MANAGEMENT (SUBFACTORS ARE OF EQUAL IMPORTANCE) -**  Based on the offeror’s Technical Proposal, Jefferson Lab will evaluate the extent and availability of offeror’s facilities and manpower and the sufficiency of the production capabilities, equipment, milestone planning, and personnel. JLAB will assess the value, merit and realism of the offeror’s proposed manufacturing plan, production timeline, quality assurance, testing, and manpower utilization.  **FACTOR 2 OVERALL RATING**:  o BLUE (Superior) 🗹 Green (Notably Above Average) 🞏 White (Average) o YELLOW (Marginal) o RED (Poor)  **Subfactor 1:** Existing production facilities are compatible to the work required and the required delivery schedule RATING: o BLUE (Superior) 🗹 Green (Notably Above Average) 🞏 White (Average) o YELLOW (Marginal) o RED (Poor)  NARRATIVE:   * **Strengths – 31,120 sq ft plant plus Mid Ohio has 30,000 sq ft machining building** * **Weakness** - * **Risks** -   **Subfactor 2:** Existing production personnel are compatible to the work required and the required delivery schedule. RATING: o BLUE (Superior) 🗹 Green (Notably Above Average) 🞏 White (Average) o YELLOW (Marginal) o RED (Poor)  NARRATIVE:   * **Strengths – Organizational chart with Key personnel and resumes provided.** * **Weakness** - * **Risks** -   **Subfactor 3:** Manufacturing Plan for fabricating and delivery of the Cryogenic Transfer Line within the required schedule provides a:  i. Logical and comprehensive approach to project management, production planning and manpower allocation, including organizational structure and personnel responsibilities.  ii. Production timeline for the fabrication and delivery of required Cryogenic Transfer Line is realistic, including consideration for potential scheduling conflicts with current and future work, and meets delivery dates outlined in Terms and Conditions of the RFP.   RATING: o BLUE (Superior) o Green (Notably Above Average) 🗹 White (Average) o YELLOW (Marginal) o RED (Poor)  NARRATIVE:   * **Strengths – Can meet 12 ARO requirement. Key on safety issues. PHPK is ASME VIII Div 1 and 2 certified.** * **Weakness** - * **Risks** – **Manufacturing details use proprietary PHPK designs, not disclosed.**     ~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~  **FACTOR 3: UNDERSTANDING OF THE REQUIREMENT (SUBFACTORS ARE IN DESCENDING ORDER OF IMPORTANCE) -**  Jefferson Lab will evaluate the understanding of the requirements, including conformance to the specifications and schedule, based on the detail and clarity of the offeror’s Proposal. Any exceptions to Jefferson Lab specifications will be subject to Jefferson Lab review and approval prior to award. Jefferson Lab will also evaluate the merit and value of useful change suggestions.  **FACTOR 3 OVERALL RATING** RATING: o BLUE (Superior) o Green (Notably Above Average) 🗹 White (Average) o YELLOW (Marginal) o RED (Poor)  **Subfactor 1:** Offeror’s proposal is in conformance with the applicable JLab Specification(s); demonstrates a clear understanding of the specification requirements; and clearly addresses all discrepancies, conflicts or exceptions taken to Statement of Work. RATING: o BLUE (Superior) o Green (Notably Above Average) 🞏 White (Average) 🗹 YELLOW (Marginal) o RED (Poor)  NARRATIVE:   * **Strengths -** * **Weakness** – **Shipping restraints will be for 0.5g not 3g, this to decrease heat load, but risk of transport damage.** * **Risks** -   **Subfactor 2:** Change suggestions are useful, well supported, and include price and schedule impacts. RATING: o BLUE (Superior) o Green (Notably Above Average) 🗹 White (Average) o YELLOW (Marginal) o RED (Poor)  NARRATIVE:   * **Strengths – Will calculated expected heat leak. LN2 cold shock test.** * **Weakness** – * **Risks** -   ~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~  **FACTOR 4: QUALITY ASSURANCE (SUBFACTORS ARE IN DESCENDING ORDER OF IMPORTANCE) -**  Jefferson Lab will evaluate the offerors’ Quality Assurance Plans and procedures (see Section 6.0 of Specification 67145-SPEC-00700).  **FACTOR 4 OVERALL RATING**  o BLUE (Superior) o Green (Notably Above Average) 🗹 White (Average) o YELLOW (Marginal) o RED (Poor)  **Subfactor 1:** Submitted QA Plan supports ability to effectively manage the project and ensure all requirements of the specification are met, a quality product is produced, and all required documentation is submitted. Non-destruction Examination (NDE) Personnel are qualified to ASNT, or equivalent, standards. RATING: o BLUE (Superior) o Green (Notably Above Average) 🞏 White (Average) 🗹 YELLOW (Marginal) o RED (Poor)  NARRATIVE:   * **Strengths -** * **Weakness** – QA plan provided but is not certified. * **Risks** -   **Subfactor 2:** Submitted Weld Procedure Specification (WPS) demonstrates ability to ensure all requirements of the specification are met, a quality product is produced, and all required documentation is submitted. RATING: o BLUE (Superior) o Green (Notably Above Average) 🗹 White (Average) o YELLOW (Marginal) o RED (Poor)  NARRATIVE:   * **Strengths – Detailed WPS given They are code U2, R and U certified.** * **Weakness** - * **Risks** - | |
| **Subfactor 3:** Company methodology for avoiding problems and dealing with problems that are encountered.. RATING: o BLUE (Superior) 🗹 Green (Notably Above Average) 🞏 White (Average) o YELLOW (Marginal) o RED (Poor)  NARRATIVE:   * **Strengths – Provided examples of changes and delivery schedule impacts from other projects.** * **Weakness** - * **Risks** – | |

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| INDIVIDUAL EVALUATION RATING WORKSHEET | |
| **EVALUATOR:**  **SOLICITATION TITLE:** | ***🞏 INITIAL EVALUATION***  ***🞏 FINAL EVALUATION***  ***(Check Applicable Box)*** |

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| **Vendor’s** | **Team Technical Rating: (Blue, Green, White, Yellow, Red)** | | | |
| Factor 1 Qualifications: Experience and Past Performance | **Factor 2** Resources: Facilities, Planning, and Management | **Factor 3** Understanding of the Requirement | | **Factor 4** Quality Assurance | **NOTES** |
| **Vendor 1** |  |  |  | |  |  |
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| **Vendor 2** |  |  |  | |  |  |
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| **Vendor 3** |  |  |  | |  |  |
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| **Vendor 4** |  |  |  | |  |  |
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| **Vendor 5** |  |  |  | |  |  |
| **Evaluator Name and Signature:** | |  | |  | | |
| **Date:** | |  | |  | | |