

ANNEX “C”

PROPOSAL TECHNICAL EVALUATION CRITERIA

POINT RATING

The Offeror is requested to provide resume(s) clearly demonstrating educational background, qualifications and work experience related to the type of work described in this offer.

If more than one person will be providing services for this requirement, resumes must be provided for each potential resource. Each proposed resource will be evaluated against the criteria and an average score will be used to calculate the Offerors total score and ranking. Only the person or persons who qualify will be allowed to provide services under the resulting SO.

Each potential financial expert providing work under this RFSO will have to respond to each of the criteria in the overall requirements.

The technical component of the proposal will qualify if it achieves **an overall score** equal to or in excess of 70%.

The technical proposal must not refer specifically to personal or confidential information gained under a previous contract for similar services. As well, it is forbidden to make specific references to individuals or businesses that might directly or indirectly reveal personal or confidential information.

The Offeror is requested to use the table provided to identify where the information can be found in the proposal – replicate the table for each proposed resource.

POINT-RATED CRITERIA

Rated Criteria Number	Description	Scoring Grid	Cross Reference to Proposal
1	<p>The Offeror should demonstrate that the proposed financial expert has relevant education / designation. Relevant education includes the following:</p> <ul style="list-style-type: none"> • university degree in Accounting or Agriculture or Business Administration • Accounting Designation: CA or CMA or CGA • college Diploma in Accounting or Agriculture or Business Administration • certification of completed training course(s) in Accounting or Agriculture or Business Administration. <p>Proof of education / certification (copy of certificate) should be provided to demonstrate compliance.</p>	<p>A Maximum of 10 Points will be awarded as follows:</p> <ul style="list-style-type: none"> • University Degree: 10 points OR • Accounting Designation: 10 points OR • College Diploma: 7 points AND • Completed training course: 1 point for each certification for each completed training course, with a maximum of three (3) certificates 	

2	<p>The Offeror should demonstrate that each proposed resource has a minimum of three (3) years of experience in financial/accounting matters pertaining to agriculture or small business such as preparing and analyzing historic and pro-forma financial statements (balance sheets, revenue and expense statements, business ratio analysis, source and use of funds schedules, cash flow statements) on both a cash and accrual basis.</p> <p>The Offeror should include relevant work history with a description of the work.</p>	<p>A maximum of 15 Points will be awarded as follows:</p> <ul style="list-style-type: none"> • 11 points for a minimum of three (3) years of experience <p>AND</p> <ul style="list-style-type: none"> • 1 point for each additional year (maximum of 4 additional years) 	
3	<p>The proposed financial expert should explain how they would conduct third party verification of liabilities and how you would determine the current valuation of assets.</p>	<p>A maximum of 10 Points will be awarded as follows:</p> <ul style="list-style-type: none"> • Up to 5 points for the description of how to conduct third party verification of liabilities AND • Up to 5 points for the description of how to determine the current valuation of assets. 	
4	<p>The proposed financial expert should provide a brief summary of their understanding of the role of the financial expert as outlined in the Farm Debt Mediation Act.</p>	<p>Up to 5 points will be awarded.</p>	
5	<p>The proposed financial expert should provide 2 examples with outcomes that demonstrate experience in preparing and analyzing a financial statement, formulating options and developing solutions for financial recovery as per the statement of work included in the RFSO. The examples should be provided on computer spreadsheet.</p>	<p>Up to 15 points per example will be awarded for a maximum of 30 points.</p>	
6	<p>The proposed financial expert should provide one example</p>	<p>A maximum of 10 Points will be awarded as follows:</p>	

	<p>that describes experience in assisting individuals or groups in stressful situations including marital, family, partnership issues or financial difficulty in your professional capacity. Provide information on impact of the current situation, steps taken to lead to the resolution of the situation and the outcome of your intervention.</p>	<ul style="list-style-type: none"> • Identification of situation 2 points; • Impact on participants 1 point; • steps taken (up to 4 steps) Max 4 points; • outcome 3 points 	
		<p>TOTAL SCORE</p> <p>MINIMUM POINTS REQUIRED TO PASS</p>	<p>80 points</p> <p>56 points (70%)</p>