MBDA Business Center Competitive Panel Review Form

Application Information

Competition ID#:
Application #:
NEC: Center Location
Applicant Organization Name:
Applicant Point of Contact Name:
Address: City, State, Zip
Telephone: Email:

Administrative Review	**Yes**	**No**	**Points Deducted**
Was a table of contents provided?			0.5
Were the pages numbered consecutively?			0.5
Were all required standard and commerce forms submitted?			1
Total Points Deducted			

For any of the five areas above where points were deducted, please specify the missing element(s) and/or document(s):

Preliminary Cost Information	**Year 1**	**Year 2**	**Year 3**	**Year 4**
Federal Share				
Non-Federal Cost Share				
Program Income*				
Cash*				
In-Kind*				
Total Non-Federal Cost Share				
Total Project Cost				

**Includes applicant and 3rd party in-kind contributors with commitment letter.*

Summary of Points Awarded	**Max Points**	**Actual Points**	**Percent**
Section I. Applicant Capability	30		
Section II. Resources	20		
Section III. Techniques & Methodologies	30		
Section IV. Proposed Budget	20		
Administrative Points Deducted			
Subtotal	100		
Service Innovation Bonus Points	10		
Final Score	110		

Panelist Name:
Initials:_____

MBDA Business Center
Competitive Panel Review Form

Panelist Instructions

The competitive review panel will score each application based upon the evaluation criteria. **Scoring is restricted to the information contained in the application.** Previous knowledge concerning the applicant organization or staff may not be taken into consideration. Panelists are not to compare or contrast applications in determining scores. Each application must be reviewed based on its individual merits.

Scoring sheets have been designed to capture the requirements of the Federal Funding Opportunity Announcement. The scoring of each criterion must be based on the strengths and weaknesses of the application. **Only the following ratings may be assigned: Outstanding, Good, Adequate, Fair, Poor or Not Addressed.** To assist in assigning an appropriate score, **the following shall be used as a guideline**:

- Outstanding: Applicant fully addresses all elements of the criterion, convincingly demonstrates that it will meet the program requirements, and demonstrates no weaknesses.

- Good: Applicant fully addresses a majority of the elements of the criterion, convincingly demonstrates a likelihood of meeting the program requirements, and demonstrates only a few minor weaknesses.

- Adequate: Applicant addresses most of the elements of the criterion and demonstrates an ability to meet the program requirements. The application may contain significant weaknesses and/or a number of minor weaknesses.

- Poor: Applicant fails to address a majority of the elements of the criterion and the information presented does not demonstrate the likelihood of successfully meeting the program requirements. Significant weaknesses are evidenced and clearly outweigh the strengths presented.

- Unacceptable: Applicant does not address a majority of the elements of the criterion and the information presented indicates a strong likelihood of failure to meet the program requirements.

- Not Addressed: Applicant failed to address the criterion.

Comments are mandatory. Each merit review panel member is required to provide substantive written strengths and weaknesses with regard to each evaluation criterion. The comments should correspond with the panelist’s rating and will serve as a basis to assigning a score to the application. Each panelist’s written comments on the application's strengths and weaknesses are critical to the evaluation.

A strength is an aspect of an application that, when compared to the stated evaluation criterion, appears to positively affect the applicant's probability of successful program outcomes

A weakness is an aspect of an application that, when compared to the stated evaluation criterion, appears to negatively affect the probability of successful program outcomes.

In general, a significant weakness in the proposal is a flaw that appreciably increases the probability of unsuccessful program performance by the applicant. Further, where descriptions of elements in the panel evaluation tool include the word "must," an applicant's failure to address the referenced element is also considered to be a significant weakness.

Please write in complete, coherent sentences. Phrases are often difficult to interpret, and this information will be used to develop a scoring summary and may be provided to the applicant in a debriefing.

In addition to providing comments on the strengths and weaknesses of the applicant's response to each criterion, **panelists must indicate whether the applicant addressed all elements of the criterion.** In alignment with the above rating guidelines, **if an applicant fails to address <u>all</u> elements of a criterion, the highest rating available for that criterion shall be a rating of "Good."**

No calculation of points is required on the part of the panelist. The panel evaluation form is an electronic tool that will automatically assign the number of points that corresponds to the adjectival rating (i.e. Outstanding – Not Addressed) assigned by the panelist. Points will be given for each evaluation criterion not to exceed the maximum number of points allowed for each criterion.

Consistent with the guidance above, if a panel reviewer finds and indicates that an applicant failed to address a specifically required element of any criterion, the available rating selections for said criterion will be limited on the electronic panel evaluation form to no higher than "Good."

The form will also roll up a total for each of the major application sections and the overall application. A short summary is provided under the header of each major section of the application providing a listing of the rating categories and the corresponding points assigned to each. The maximum number of points for each major section, as well as each criterion, is provided.

<u>Program Narrative</u>

Section I. Applicant Capability (Maximum Points Allowable = 30)

The following ratings (with corresponding points shown) are to be assigned:

Outstanding (5) / Good (4) / Adequate (3) / Poor (2) / Unacceptable (1) / Not Addressed (0)

The following shall be evaluated:

A. Organizational Background and Knowledge of Community (5 points maximum)

Panel Definition: (i.) Applicant's organizational background, emphasizing knowledge of the minority business sector and strategies for enhancing its growth and expansion. (ii) Whether the applicant has a physical presence in the applicable location and past experience providing related services is to be evaluated.

Applicant addressed all elements (i. – ii.) of the criterion? Yes No
Applicant provided a copy of applicant organizational chart? Yes No

Strengths:

Weaknesses:

Rating:

B. Mission Alignment (5 points maximum)

Panel Definition: The extent to which the mission of the applicant organization aligns with the mission of MBDA and the objectives of the MBDA Business Center program.

Strengths:

Weaknesses:

Rating:

C. Access to Markets (5 points maximum)

Panel Definition: (i.) Applicant's knowledge of and experience in public and private sector contracting opportunities for MBEs, as well as (ii.) demonstrated experience in assisting clients into supply chains. (iii.) The applicant's professional working relationships and networks with potential sources of contracts for MBEs are also to be evaluated. Additional evaluation factors are the applicant's experience with (iv.) facilitating large procurement/contract deals on behalf of minority firms, (v.) conducting business matchmaking forums, and (vi.) assisting MBEs with the establishment of joint ventures and teaming arrangements.

Applicant addressed all elements (i. – vi.) of the criterion? Yes No

Strengths:

Weaknesses:

Rating:

D. Access to Capital (5 points maximum)

Panel Definition: Applicant experience in successfully preparing and matching MBEs with (i.) traditional sources of capital, (ii.) alternative sources of financing (i.e., equity and venture capital), (iii.) loan and bonding packages, and (iv.) mergers and acquisitions. (v.) Applicant's professional working relationships and networks with financial institutions (corporate, banking and investment communities).

Applicant addressed all elements (i. – v.) of the criterion? Yes No

Strengths:

Weaknesses:

Rating:

E. Business Consulting to Clients (5 points maximum)

Panel Definition: The applicant's experience with and strategies for (i.) enhancing minority business growth and (ii.) delivery of business consulting services and related successful client outcomes.

Applicant addressed all elements (i. & ii.) of the criterion? Yes No

Strengths:

Weaknesses:

Rating:

F. Key Staff (5 points maximum)

Panel Definition: Qualifications and experience required of proposed staff, including but not limited to the Project Director and business consultants. The applicant may identify a proposed project director within its application or after an award is issued. All staff shall possess the ability to successfully deliver the program services and fulfill the work requirements of the FFO, and must be experienced in utilizing information systems. Position descriptions, qualification requirements, education requirements, and salary range must be provided for each proposed MBDA Business Center staff position (include under program

narrative attachments). If a specific individual is identified for a position, a copy of the individual's resume must be submitted. Applicant's plan for recruiting staff should be addressed.

Applicant provided position descriptions, qualification requirements, education requirements, and salary range for each proposed MBDA Business Center staff position? Yes No

Applicant provided its plan for recruiting staff? Yes No

Was a specific individual identified for the position of Project Director? Yes No

If yes, were a (i.) letter of commitment, (ii.) copy of the individual's resume, and (iii.) three professional references submitted? Yes No

Were specific individuals identified for any position other than Project Director? Yes No

If yes, were a (i.) copy of the individual's resume and (ii.) three professional references submitted? Yes No

Strengths:

Weaknesses:

Rating:

Section II. Resources (Maximum Points Allowable = 20)

A. Partners (10 points maximum)

The following ratings (with corresponding points shown) may be assigned:

Outstanding (10) / Good (8) / Adequate (6) / Poor (4) / Unacceptable (2) / Not Addressed (0)

The following shall be evaluated:

Panel Definition: (i.) The applicant's plans for establishing and maintaining a network of strategic partners and (ii) the extent to which each partner will support the center in implementing the program and meeting program performance goals. (iii.) Whether the partnerships will be leveraged towards assisting

clients with securing contracts, securing financing, job creation, penetrating global markets, achieving size and scale, or providing referrals for services is also to be evaluated. A further evaluation factor is (iv.) how the applicant proposes to interact and coordinate with its strategic partners towards effecting successful client outcomes.

Applicant addressed all elements (i. – iv.) of the criterion? Yes No
Applicant provided original letters of commitment from strategic partners listed indicating their willingness to work with the applicant? Yes No

Strengths:

Weaknesses:

Rating:

B. Resources (5 points maximum)

The following ratings (with corresponding points shown) are to be assigned:

Outstanding (5) / Good (4) / Adequate (3) / Poor (2) / Unacceptable (1) / Not Addressed (0)

The following shall be evaluated:

Panel Definition: Resources that will be used in implementing the program in each of the four program years are to be evaluated. Resources include, but are not limited to, existing prior and/or current data lists that will serve in fostering immediate success for the MBDA Business Center.

Applicant provided original letters of commitment from resources listed indicating their willingness to work with the applicant? Yes No

Strengths:

Weaknesses:

Rating:

C. Location/Equipment (5 points maximum)

The following ratings (with corresponding points shown) are to be assigned:

Outstanding (5) / Good (4) / Adequate (3) / Poor (2) / Unacceptable (1) / Not Addressed (0)

The following shall be evaluated:

Panel Definition: (i.) The applicant's strategic rationale for the proposed MBDA Business Center office (the center location must be close to private and public sector resources and potential clients, and be professional in appearance). (ii) The applicant plans to satisfy the information technology requirements, including computer hardware, software requirements, creation and support of a network map (*see* Appendix C, "Information Technology and Computer Requirements") is also to be evaluated.

Applicant addressed all elements (i. & ii.) of the criterion? Yes No
Center location proposed by applicant is the same as location specified in the FFO? Yes No

Strengths:

Weaknesses:

Rating:

Section III. Techniques and Methodologies (Maximum Points Allowable = 30)

The following ratings (with corresponding points shown) may be assigned:

Outstanding (10) / Good (8) / Adequate (6) / Poor (4) / Unacceptable (2) / Not Addressed (0)

The following shall be evaluated:

A. Performance Measures (10 points maximum)

Panel Definition: (i.) For each of the four (4) funding periods, the applicant's techniques and methodology to be used in implementing the program are to be evaluated, including the quarterly breakdown of the performance goals. In addition, (ii.) the applicant's recognition of and strategy for addressing existing market conditions in achieving performance goals are also to be evaluated. A further evaluation factor is (iii.) how the applicant proposes to establish a system that corresponds to, or may compliment, MBDA's tracking and validation of contracts and financings. (*See* Estimated Performance Goals for each MBDA Business Center location are listed in Appendix B, Estimated Performance Goals by Center Location, of the FFO.) Please note that deviations, either above or below, from the Estimated Performance Goals require justification.

Applicant addressed all elements (i. – iii.) of the criterion? Yes No

Did applicant propose goals that were either above or below those listed in Appendix B – Estimated Performance Goals? Yes No

If yes, was justification provided for the deviation(s) from the suggested performance goals? Yes No

Strengths:

Weaknesses:

Rating:

B. Start-up Phase (10 points maximum)

Panel Definition: (i) The applicant's strategic plan for commencement of the MBDA Business Center operations within the initial 60-day period (the center shall have sixty (60) days to become fully operational after an award is made - *see* Section I.A.4., Operational and Performance Requirements, of the FFO) is to be evaluated. Please note that the applicant must submit (ii) a schedule with significant implementation milestones, such as the hiring of key staff and the opening of the facility.

Applicant addressed all elements (i. & ii.) of the criterion? Yes No

Strengths:

Weaknesses:

Rating:

C. Work Requirements Execution Plan (10 points maximum)

Panel Definition: The (i.) applicant's description for how staff time will be used effectively and efficiently to achieve the work requirements of the overall program, including the start-up phase, is to be evaluated. Please note that the (ii.) applicant must include a specific four-year plan-of-action detailing how the program work requirements will be met for each of the four (4) funding periods. (*See* Program Details and Work Requirements in Section I.A.4, of the FFO.) A staff allocation chart for each of the four (4) years must also be included as part of the work requirements execution plan.

Applicant addressed all elements (i. & ii.) of the criterion? Yes No
Applicant provided a staff allocation chart for each of the four program years? Yes No

Strengths:

Weaknesses:

Rating:

Section IV. Proposed Budget and Budget Narrative (Maximum Points Allowable = 20)

The following ratings (with corresponding points shown) may be assigned:

Outstanding (10) / Good (8) / Adequate (6) / Poor (4) / Unacceptable (2) / Not Addressed (0)

The following shall be evaluated:

A. Reasonableness, Allowability and Allocability of Proposed Costs (10 points maximum)

Panel Definition: (i.) All of the proposed program costs expenditures should be broken down into their individual units and discussed. (ii.)The budget narrative must match the proposed line item budget, time phased plan, and staff allocation table. (iii.) Fringe benefits and other percentage item calculations should match the proposed budget line-item and narrative. (iv.) Line item amounts in the detailed budget and budget narrative must match the budget numbers reflected in Standard Form (SF) 424 (one for all four years) and 424A (one for each of the four years). (v.) All costs included in the proposed budget must be allowable, allocable and reasonable. (vi.) Each item of cost must be accompanied by a sufficiently detailed description and cost breakdown to enable reviewers to make a determination regarding its allowability, allocability and reasonableness. One word descriptions and lump sum amounts are not adequate for justifying costs. Each budget item should be broken out and described fully so that there is no ambiguity as to its relevance to MBDA Business Center program objectives and its reasonableness.

The following Office of Management and Budget (OMB) Circulars and Federal Acquisition Regulations (depending on the type of recipient) will be used to determine allowable costs, and will apply to the entire amount of the MBDA Business Center award, including both the federal and non-federal program costs:

- 2 C.F.R. part 220 (OMB Circular A-21, “Cost Principles for Educational Organizations);
- 2 C.F.R. part 225 (OMB Circular A-87, “Cost Principles for State, Local and Indian Tribal Governments);
- 2 C.F.R. part 230 (OMB Circular A-122, “Cost Principles for Nonprofit Organizations); and
- 48 C.F.R. part 31 for commercial organizations and for those organizations listed in Appendix C to 2 C.F.R. part 230

Applicant addressed all elements (i. - vi.) of the criterion? Yes No
Applicant provided a budget detail and narrative for each of the four program years? Yes No

Strengths:

Weaknesses:

Rating:

B. Performance-Based Budgeting (10 points maximum)

Panel Definition: The extent to which the line-item budget and budget narrative relate to the accomplishment of the MBDA Business Center work requirements and performance measures (*i.e.*, performance-based budgeting) is to be evaluated. The budget will be compared to the program narrative to determine whether the budget is realistic from a programmatic perspective and whether costs are necessary to complete the work requirements. Costs included in the budget that are determined to be unrealistic will be considered as an indication of an applicant's lack of understanding of the requirements of the program and/or the methods that must be utilized to deliver services. Program Income (*i.e.*, client fees, membership fees, success fees, and/or other acceptable fee structures proposed) must be adequately addressed and properly documented, including but not limited to how the proceeds will be billed, collected, waived and used by the applicant in furthering the program objectives.

Proposed budget is realistic from a programmatic perspective and costs are necessary to complete the work requirements. Yes No

Applicant submitted a line item budget (SF 424A) and corresponding budget narrative for EACH of the four (4) funding periods under the award. Yes No

Applicant included the correct federal contribution to the budget designated for the award (as set forth in Appendix A, "Anticipated Funding Availability by Center Location," of the FFO), which must not be exceeded in the proposed project budget. Yes No

Applicant included costs for each of the training events set forth in Appendix E, "MBDA Business Center Training Requirements." Yes No

Applicant itemized non-federal cost share on the SF-424A, the program line-item budget and in the budget narrative. Yes No

Applicant included original signed commitment letters for all third-party, in-kind contributions. Yes No

For each of the four anticipated funding periods under the MBDA Business Center award, Applicants identified: (i) how program income will be generated by the program; (ii) the anticipated amount of program income (which must be identified as non-federal cost share in the project's proposed budget); and (iii) and how the program income will be used to further the MBDA Business Center program objectives. In this respect, all proposed fee structures and other methods for the center's generation of program income must be acceptable to MBDA and approved by the Grants Officer. Yes No

Applicant clearly articulated methodology for estimating the amount of fees to be billed and to be collected. Yes No

Applicant included a discussion of their policy for fee waivers and/or accounts not collectable, indicating, for each of the funding periods, at what point fees are charged to its clients (e.g., upon completion of work assignment and/or successful completion of awarded transaction) and how it intends to collect and manage fees. Yes No

Strengths:

Weaknesses:

Rating

Service Innovation – Bonus Points (Maximum Points Allowable = 10)

The following ratings (with corresponding points shown) may be assigned:

Outstanding (10) / Good (8) / Adequate (6) / Poor (4) / Unacceptable (2) / Not Addressed (0)

The following shall be evaluated:

Panel Definition: Bonus points may be awarded to applicants proposing innovative MBE services that enhance the required MBDA Business Center program scope. This component is optional and any service(s) proposed under the "Service Innovation" is in addition to the core MBDA Business Center services listed under the "Program Details and Work Requirements" in Section I.A.4., of the FFO.

Proposed innovations cannot be used as a substitute or otherwise in lieu of the defined MBDA Business Center program and service requirements.

An applicant proposing a "Service Innovation" must fully describe the aspects of any innovative addition(s) to the work requirements that the applicant will implement. Some examples have been provided in Appendix F – Sample Service Innovation Concepts, of the FFO. Applicants are not required to utilize these examples. MBDA encourages any innovative solutions; however, proposed ideas (including the stated examples) must be fully developed and articulated, including processes and anticipated results.

Applicant proposed a 'Service Innovation?" Yes No

If yes, was proposed idea fully developed and articulated, including processes and anticipated results? Yes No

Strengths:

Weaknesses:

Rating