

## 2016/2017- Review Panel Instructions

### A. Introduction

Proposals must provide services under one of the three priority outcome areas:

- Supportive Living
- Activities for Children and Youth
- Emergency Assistance

Proposals will be randomly assigned to teams. Proposals will not be separated by priority area; therefore teams may be reviewing proposals from several different priority areas. Proposals should be scored based on the value of the written proposal and supporting documentation. Proposals should stand on their own merits and the scoring should be based on the quality of information that is presented.

Only proposals from organizations that met basic bidder requirements, proposal criteria, and are for eligible services will be reviewed by the review panel. Using the *Review Panel Proposal Evaluation Tool* each review panel member will read and individually score each proposal assigned to them. The team will then develop a consensus score.

The written proposal and supporting documentation will be the *sole* basis by which panel members and teams will score. **No verbal dialogue with applicant organizations or written clarification will be permitted.**

### B. Team Instructions

- Individual team members will be allocated 2-4 weeks to review and score all assigned proposals. The questions on the Tool are a guide for individual members to score each proposal. Specific strengths, weaknesses and rationale for scoring about the proposal should be recorded in the evaluation tool.
- The team will then meet publicly to discuss the individual scores and develop a team consensus score for each proposal. DHVS staff will provide a spreadsheet which shows the mean (average) of all team members' scores. When discussing a proposal, **first review the average scores. If the average scores are acceptable to everyone, further discussion regarding the scores is not needed.**
- Each team will select a Team Leader who will facilitate the team meetings, and ensure that each proposal is scored and comments are collected. The team scores, proposal summary sheets and recommendations will be submitted to DHVS staff.
- Each team will also select a Recorder who will record the team score. The Recorder will also summarize key strengths and weaknesses of each proposal if comments were not already included by the individual scorer in the Proposal Evaluation. The notes/comments will be provided as feedback to the applicant organization.
- It is **not** necessary to go over each question on the evaluation tool during the team meetings. It is only necessary to reach a consensus score for each proposal. Members do not need to change their individual scores as long as a group consensus is achieved. Only those proposals with a total composite score of 70% or higher (70 points) will be eligible for funding.
- A final meeting of the entire review panel will be held to rank all proposals based upon the team score and develop a final set of recommendations that will be submitted to the Board of County

Commissioners for consideration. **It is vital that all review panel members attend this meeting. There must be a quorum present in order to finalize the recommendation that will be submitted.**

- Applicant organizations will be notified of the date at which their proposal is scheduled to be evaluated. **However, applicant organizations may not provide verbal or written clarification.**

### **C. Panel Member Instructions/Responsibilities**

Each review panel member will:

- Be aware of the overall meeting and review schedule and allocate time accordingly to review and score the assigned proposals prior to the scheduled meeting and attend all scheduled meetings.
- Read the *Review Panel Proposal Evaluation Tool* carefully in advance of reading and scoring individual proposals to be fully aware of the evaluation criterion and maximum points that can be allocated to each Section.
- Use the Review Panel Proposal Evaluation Tool to score each proposal prior to the scheduled team meetings. The evaluation tool can be completed on-line (**this is preferred**). Individual scores for proposals must be submitted to Maxine Gibbs **in advance** so that the spreadsheet of scores can be prepared in time for the team meeting. If the evaluation is completed on-line, hard copies will not need to be submitted as it can be obtained on-line. A deadline date of several days prior to the scheduled team meeting will be provided.
- Bring enough materials to each meeting, to be prepared to discuss the strengths, weaknesses and scores assigned to each individual proposal, listen carefully to the comments of other team members and agree upon a **team consensus** score, and summary of strengths and weaknesses. Materials that may need to be brought to the team meetings could include: completed Review Panel Proposal Evaluation and notes/comments/rationale for scoring.

### **D. Additional Information**

The following information can be found at: <https://www.leegov.com/dhs/pfr/review>

PFR 16-17 Evaluation Sheet

On-Line Evaluation Tool Instructions for Reviewers

2017 Guide to the Sunshine Law

2017 Glossary of Terms

Signed Final 9-29-16 Minutes

Form 3a (Competitive Bid)

Form 4a (Disclosure)

Form 8b (Voting Conflict)

Lee county Packet for RP appointees (Non Reporting)