

**California Public Employees' Retirement System****Professional Actuarial Services Spring-Fed Pool****Proposal Evaluation Sheet**

Firm's Name \_\_\_\_\_

☐ SB/MB vendor☐ DVBE vendor

DVBE Incentive \_\_\_\_\_%

**Identify each service category covered in the Proposal**

(Select the appropriate service category for each service submitted in the proposal response – more than 1 service can be selected)

**Service Category:**☐ A) Retirement Services☐ B) Health Services☐ C) Long-Term Care Services

I.	Proposal Questionnaire Response	Maximum Points	Proposer's Points
	A. Background	140	_____
	B. Organization	140	_____
	C. Services to be Provided	140	_____
	D. Professional Staff	140	_____
	E. Firm References	140	_____
	<b>Total Technical Points*</b>	<b>700</b>	_____

\* The highest scoring proposals, as determined by CalPERS, will continue in the evaluation process.

Firm's Name Enter Firm's Name

II.	Fee Proposal	Maximum Points	Proposer's Points
	Lowest Average Fee Over Five Years	300	_____
	<b>TOTAL FEE POINTS</b>	<b>300</b>	_____
Combined Section I And II Total Points		Maximum Points	Proposer's Points
	Section I Total Technical Points	700	_____
	Section II Total Fee Points	300	_____
	<b>Total Sections I and II Points**</b>	<b>1,000</b>	_____

\*\* The highest scoring proposals, as determined by CalPERS will be Finalists.

**PROPOSER SELECTED AS FINALIST?**Yes ☐No ☐**Background and Reference Checks**

If conducted, background and reference checks satisfactory? Yes ☐ No ☐ N/A ☐

III.	Total Combined Points	Maximum Points	Proposer's Points
	Total Technical Points	700	_____
	Total Fee Points	300	_____
	<b>Total Points</b>	<b>1,000</b>	_____

Firm’s Name Enter Firm's Name

DVBE / SB Preference Points	Maximum Points	Proposer’s Points
SB Preference Points	50	<hr/>
DVBE Incentive Calculation (if applicable)	50	<hr/>
Grand Total Points		<hr/>