Blue Mountain State University – A Case Study
Selecting Socially Responsible Contractors for a New Building

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Abstract
In a setting based on an actual university, students are faced with difficulties associated with non-financial metrics, and with integrating financial and non-financial metrics to arrive at a decision. The setting is construction of a new business school building, which required selection of sub-contractors. Sub-contractors were chosen based upon both social responsibility and financial aspects. Social responsibility aspects were determined through use of a questionnaire, which was subsequently scored by Monitoring Committee members. The average score was then used as the measure of social responsibility. The case challenges students to evaluate the (flawed) algorithm for combining financial and social responsibility factors and to design a new system. This case illustrates an issue that arises in many settings where different qualitative and quantitative factors must be combined to make a decision.

Keywords: Social responsibility, performance evaluation, awarding building contracts, qualitative and quantitative performance measures

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Case ID: 030102
Background
In the fall of 20XX, the administration of Blue Mountain State University was confronted with a dilemma. The State’s declining economy, coupled with the University’s increasing national reputation had resulted in record number of applications for admittance. At the same time the University’s facilities were becoming increasingly obsolete and inadequate. Further, the economic decline had resulted in the State’ Governor and legislature agreeing to reduce the State’s support for infrastructure replacement and expansion at its State Universities.

In a meeting with the University’s President, Carolyn Beery, Dean of the University’s School of Business, proposed a solution. She suggested that the University assess all students a building construction and maintenance fee. The President thought the idea had possibilities, but was reluctant to unilaterally impose a significant new fee. Dean Beery suggested that the administration sit down with the officers of the Student Government Association and discuss this issue.

During the meeting, the student representatives surprised the administration by agreeing that the University was in need of new buildings, particularly a new Business School, and that without their help, nothing would happen.

A special campus wide referendum was subsequently conducted and the student body voted in a capital fee, which was to be used for new building projects. The new business school was one of the first projects to receive this funding. The students’ fees would be used to cover 35-40% of the eventual building cost.

The officers of the Student Government Association (SGA) realized that given the magnitude of their financial contribution, they could influence the way that buildings were designed and constructed on campus. They demanded that the SGA have a significant voice in the awarding of construction contracts and the administration agreed.

Corporate Social Responsibility
The following discussion occurred at the SGA meeting subsequent to the passage of the referendum.

Student Body President:
“We have an opportunity to encourage contractors to address and act on their responsibility to consider social and environmental concerns into their business operations and their interactions with local and state community.”

Student No. 1:
“That doesn’t make any sense. In my finance class the professor continually talks about the responsibility of management to maximize the value of the firm from the perspective of their shareholders. Doesn’t that mean that contractors will make bids that maximize their profits from the job that they bid on?”
“What about management’s obligation to act ethically? Isn’t it important for the contractors to consider how their actions affect their employees, their customers, their suppliers, or the community at large? Doesn’t a firm have an obligation to act fairly and do the right thing even if it means lower profits?”

“But doesn’t the contractor have to comply with laws and regulations? Isn’t it the role of government to decide what is appropriate behavior in business? Who says that a firm’s management can or should be making decision about what is best for society?”

“It seems to me that encouraging contractors to consider their social responsibilities is in the interests of their shareholders. Won’t customers like the University prefer to do business with firm’s that have reputation for be good citizens? Won’t the best employees want to work for the best firms?”

“Shouldn’t the contractor be concerned about how their actions damage the environment, endanger the public by the use of poor materials and shoddy construction practices, and/or endanger or improperly treat their employees even if it reduces their profits?”

After a continued discussion, the students agreed to meet the following week. They decided to invite some faculty members and get their inputs. At the next meeting, the faculty presented several concepts of corporate social responsibility (See Exhibit 1). After a lively discussion, the group agreed on the following definition of social responsibility (SR):

Corporation Social Responsibility relates to the efforts corporations make above and beyond those required by laws and regulation to balance the needs of stakeholders with the need to make a profit.

After further discussion, the students identified the stakeholders as students, faculty, university administration, the community, the contractor, the subcontractors, and the construction workers.

Data Gathering on Subcontractor SR
Having settled upon a definition of corporate social responsibility, the student committee quickly agreed that promoting social responsibility among the subcontractors was important, even though it might result in higher building costs. The student’s discussion then turned to trying to identify the characteristics that distinguish a subcontractor that conducts itself in a socially responsible manner. They realized that they needed to take into consideration the different viewpoints of the stakeholders that they had identified earlier.

As the discussion took place, the secretary recorded and summarized on the whiteboard the ideas generated by the group. By the end of session it was clear that the attributes could be sorted into five major areas.
Major Areas of Social Responsibility
1. Relationships between the subcontractor and its employees.
2. The subcontractor’s concern for the environment.
3. The subcontractor’s efforts to be a “good” member of the local community.
4. The relationship between the subcontractor and the University.
5. The subcontractor’s use of socially-responsible suppliers.

The students recognized that this list was too general and too large. It was agreed that the list of characteristics needed to be narrowed down and made more explicit.

During the next week the students talked to selected faculty, personnel from facilities management in the university with experience in construction and maintenance and the general contractor. The students decided that their primary concern in the evaluation of subcontractors should be the ability of the subcontractor to deal equitably and compassionately with its employees. A consensus emerged that socially responsible subcontractors should be concerned about employee interests such as health and safety programs for employees, employee training, union membership and a few other items.

The student representatives then meet with the President of University, the University Controller, the Dean of the Business School, and the Vice President for Facilities Management. It was agreed that in reviewing bids for the new Business School building, the social responsibility conduct of subcontractors (with an emphasis on responsibility to employees) would be an important element.

It was agreed that a University Contract Monitoring Committee (the UCMC) would be formed. This Committee consisted of six members: two representatives from the Student Government, two faculty members and two personnel from Facilities Management (the university department that oversees construction projects on campus).

In an effort to help control cost from the very beginning of the design process a General Contractor had been hired to manage both the design and the actual construction process of the new Business School. The General Contractor subsequently became the seventh member of the UCMC. The UCMC then assumed the responsibility for the selection of the subcontractors who would do the actual work.

The initial task of the UCMC was to finalize a questionnaire that would be used to collect information about the social responsible conduct of the subcontractors bidding on work. The initial version of this questionnaire drew heavily from the minutes of the student discussions on SR. In particular it asked questions about health and safety programs for employees, employee training, and union membership. The version of the questionnaire finally agreed upon by the Committee is included as Exhibit 2, and contains questions on the following major categories:

A. Project team, staffing and transparency
B. Project approach
C. Project experience and prior performance
D. Miscellaneous
This questionnaire was sent by the Committee to each potential subcontractor that wished to submit a bid for a given trade. The subcontractor filled out these forms with supporting documentation as they deemed appropriate. The completed forms and supporting documentation formed the basis for development of a score for social responsibility.

**Contract Evaluation**

After the questionnaires were developed, the UCMC met to consider how to analyze the information provided in the process of awarding the contract. The student representatives wanted to ensure that SR scores were given priority over the size of the bid submitted by the subcontractor. After some discussion it was agreed that a 100 point scale would be used to evaluate each bid. Sixty points of a subcontractor’s score would be based on SR performance and forty points on the relative magnitude of the amount of the bid. The formal process was as follows:

1. Solicit bids from sub-contractors for a given trade.
2. When a bid is received, forward a “Subcontractor (SC) Evaluation Questionnaire” to the SC.
3. At this point a SC can opt out of the process by choosing not to respond.
4. UCMC members individually evaluate the returned questionnaires, using the “Qualifications of Contractors Scoring Sheet.” Exhibit 3.
5. Average the scores from each UCMC member.
6. Compute the bidding cost score (max 40 points).
7. Add the qualitative social responsibility score (max 60 points) to the bid score.
8. Award the contract to the SC with the highest total score.

**Rater Evaluation**

The Social Responsibility rating system developed by the UCMC required each of its seven members to review the submission made by a subcontractor and assign a numerical score to each of the 12 attributes. Each member was required to assign a score between 0 (poor) and 5 (exceptional) to each of the attributes. Thus, a subcontractor could be awarded a maximum of 60 points (12 x 5) by any evaluator.

For the attributes with sub-parts (e.g., item 4 under Project Team, Staffing and Transparency), scores for each sub-part were averaged to compute the attribute’s score. Accordingly, for the attribute “Apprenticeship and Training Program” the score would be the average of 4a, 4b, 4c and 4d.

The basis for assigning scores to each attribute was detailed on the questionnaire sent to each prospective subcontractor. This information was shown in boxed in area which followed the description of the information requested for each attribute and subpart.

For the bid costs, to encourage competitive bids, the lowest bidder was awarded the full 40 points. The points assigned to the other bids were based on the ratio of the low bid to that subcontractors bid: (Low Bid/Subcontractors Bid) * 40 points. Thus subcontractors submitting bids relatively similar to the low bidder, received a high bidding score.
Bids
The first set of bids was solicited for construction of the steel framework for the new building. Inquiries were received from fifteen potential subcontractors, ten of whom requested the bidding package put together by the UCMC. Six subcontractors submitted completed bidding packages.

Each of the seven members of the UCMC evaluated these six questionnaires. Table 1 summarizes the scoring for each of the four major categories for each subcontractor by each member of the UCMC. In the table, members of the Monitoring Committee are identified with the numbers 1-7. Potential sub-contractors are designated with letters A-F. Table 1 also provides the mean SR score for each contractor, along with the bid price.

The bids for the work ranged from high of $511,734 to a low of $241,650. Subcontractors C and B submitted the lowest and second lowest bids. The averaged SR scores ranged from a high of 42 (out of 60) to a low of 26.86. Subcontractors F and E received the highest and second highest SR scores.

The bid price and the average across the SR scores awarded by the seven members of the UCMC were then combined to form the final recommendation. Subcontractor C with a total score of 75.46 (bid = 36.89, SR = 38.57) was awarded the contract. Table 2 reports a spreadsheet summary of the total scores and rankings of the six bidders.

Assignment Questions

1. Describe the project and process.
2. Discuss implications of including social responsibility in the criteria for sub-contractor selection.
3. Discuss characteristics of the questionnaire. What areas are covered? Are they “the right ones”? Are any missing? How subjective are the questions? Can the answers have multiple interpretations?
4. Evaluate the measurement system for the social responsibility score.
5. What are some issues associated with calculation of the total score?
Exhibit 1: Some Concepts of Social Responsibility

Corporate social responsibility:

“…the duty a corporation has to create wealth by using means that avoid harm to, protect, or enhance societal assets.” In Steiner, G., and J. Steiner, 2000 Business, Government, and Society A Managerial Perspective 9th ed. Irwin McGraw-Hill: 120.


“a concept meaning companies take the initiative themselves to reflect social and environmental concerns within their activities and in their relationships with the various corporate stakeholders.” http://www.eufin.org/glossary.en.41.html Note: Eufin.org is partially financed by the European Commission,

“a corporation should be held accountable for any of its actions that affect people, their communities, and their environment.” In Post, J., Lawrence, A., and J. Weber 2002 Business and Society Corporate Strategy, Public Policy, Ethics, 10th ed. McGraw-Hill Irwin

“Responsibility of an organization for the impacts of its decisions and activities on society and the environment, through transparent and ethical behavior that
– contributes to sustainable development, including health and the welfare of society;
– takes into account the expectations of stakeholders;
– is in compliance with applicable law and consistent with international norms of behavior; and
Exhibit 2: Subcontractor Evaluation Criteria

Questionnaire

A. Project Team, Staffing, Transparency

Provide an estimate of what % of work and type of services your company would typically subcontract for on a project of this size and scope. The Evaluation Team reserves the right to request additional information regarding these sub-subcontractors.

1. Provide an affirmation that employees have the right of self organization and the right to form, join or assist labor organizations, to bargain collectively through representatives of their own free choosing, and to engage in lawful concerted activities for the purpose of collective bargaining or other mutual aid or projection. Affirm that each employee has the right to refrain from any such activities.

Your signature at the bottom of this form will signify your affirmation of the above statement.

Key: Affirmation of the statement receives maximum points. Failure to affirm receives 0 points.

2. Describe the sources to be used for obtaining personnel and how they are inclusive of the member communities residing in state (i.e. Newspapers, word of mouth, union halls).

Key: Higher scores go to firms that show reliable access to a ready supply of skilled labor. Higher scores also go to firms that show active and ongoing participation with diverse communities and organizations that provide access to construction training for women and people of color.

3. Describe how you will ensure that at least 80% of the workers on the project will be residents of the State (examples might include checking driver’s licenses, etc.).

Key: Higher scores go to firms that provide a mechanism or process that ensures documented state residency. Firms that simply assert that their workforce is comprised of 80% in-state residents receive lower scores.

4. For each craft in which you will directly hire craft workers, describe any job skills or apprentice training programs developed or maintained by your company or in which your company participates where employees receive knowledge about the crafts and skills.

Identify both classroom apprenticeship and training programs as well as any “on the job” instruction and describe the following that apply to your company:
a. The types of training programs provided and identity of training providers and whether such programs are registered with and certified by the Bureau of Apprenticeship and Training, U.S. Department of Labor.

Key: Higher scores go to BAT-certified training programs. Higher scores also go to training programs that teach a complete range of skills appropriate to the craft, and to programs that are already in existence.

Describe the qualifications, credentials and length of experience of the instructor(s) of the program.

Key: Higher scores go to training programs where instructors have longer experience and both skills licenses and teaching certifications. In addition, higher scores go to training programs that provide teaching certification and/or university coursework to instructors.

Include how these programs are incorporated into your project organization and staffing plan.

Key: Higher scores go firms with greater integration of training programs into project work. Evidence of this includes higher journeyman-to-apprentice ratios (less apprentices to each training journeyman), and higher proportions of workers on site having either graduated or currently enrolled in the apprenticeship training program.

b. The classroom hours and total hours required to complete both apprenticeship and job skills training programs and types of accreditations and/or certifications earned upon completion of the programs.

Key: Higher scores go to more extensive training programs with a greater proportion of classroom training, and that provide graduates with recognized accreditations and/or certifications.

c. The annual dollar amount invested in such programs for the past 5 years and whether the program participants are required to pay any portion of the program costs.

Key: Higher scores go to training programs that show substantial financial investment by contractors and that minimize costs to enrollees.

d. Participation and graduation rates (expressed as a percentage of the total number of the enrollees in such programs over the previous 5 years).

Key: Higher scores go to training programs with both high participation and graduation rates, but with a greater stress on graduation rates. Firms with very high participation but very low graduation (or vice versa) may be marked down as evidence of training programs that are either ineffective or exclusive.
5. Please describe any employee healthcare coverage programs maintained by your company or in which your company participates where employees and/or their dependents receive hospitalization and medical benefits.

Please include:

a. The types of benefits and coverage provided.

Key: Higher scores go to health care programs that offer comprehensive rather than limited or catastrophic care, and that include family members as well as craft employees.

The employer and employee contributions to the cost of the plan
Please provide contribution ratios for both individual employee coverage as well as any family/dependent coverage plan that is offered.

Key: Higher scores go to health care programs that have a higher ratio of employer-to-employee costs of enrollment.

Deductible amounts:

Key: Higher scores go to health care programs with lower deductibles.

b. The percentage of employees covered by the plan.

Key: Higher scores go to health care programs that have higher rates of participation by craft employees.

And the percentage of employees, both full and part-time, for whom a plan is available.

Key: Higher scores go to health care programs that are available to a higher proportion of craft employees.

c. Whether the plan automatically provides employee coverage or is on a voluntary opt-in basis.

Key: Higher scores go to health care programs that provide automatic coverage of craft employees.

Whether employee dependents are covered and whether dependent participation is automatic or on a voluntary opt-in basis

Key: Higher scores go to health care programs that provide automatic dependant coverage for craft employees.

6. Outline your company’s employee grievance and dispute resolution process and procedures and who bears the costs. Include steps and actors involved in the process.
B. Project Approach

1. Describe any of your environmental programs on project job sites that apply to your trade (such as use of recycled materials, indoor air quality capabilities, hazardous waste reduction, etc.).

   Key: Higher scores go to firms with more comprehensive and innovative environmental programs.

2. Describe in detail the comprehensive safety program your company proposes to implement on the Project

Please Include:

a. Any safety training or incident avoidance programs used by your company for management and craft personnel, including OSHA courses and standards, substance abuse programs, etc.

   Key: Higher scores go to firms with systematic and regular safety training for all craft workers and new employees.

b. Provide a copy of any applicable written health and safety plan used by your company. Describe how the program is incorporated into your Project organization and overall staffing plan.

   Key: Higher scores go to firms with mandatory rather than voluntary health and safety programs, and with greater integration of the health and safety plan into the project.

c. Provide by year, the number of OSHA violations your company has received on projects during the past five (5) years. Describe the violation and provide the final results for each citation identified.

   Key: Higher scores go to firms with fewer citations, but points may be added for evidence of vigorous and timely action taken to correct violations.

d. Describe by year your company’s workers compensation claims filed and the final result.

   Provide your company’s experience modification rating for the past three years:
   2005: _____________________________
   2004: _____________________________
   2003: _____________________________

   Key: Higher scores go to firms with fewer claims and lower experience modification ratings (a rating below 1.0 is favorable, above 1.0 is problematic).
C. Project Experience/Past Performance

1. Provide a copy of your firm’s resume and any additional information regarding your general and specialized experience and expertise and its relation to the prospective contract work.

Key: Adequate provision of this information receives maximum points, with points being deducted for missing information.

2. Provide a list of all projects completed in the past three (2) years that have a value of $500,000 or more. For each project, provide the following data regarding the contract or subcontract work performed by your firm (if there were more than 10 projects, limit this list to the 10 most recent):

- Project Name
- Contact Information for Project Owner, General Contractor or AE
- The original bid or proposal price and final amount paid to your firm for the project; the original schedule completion date and final completion date. You may provide an explanation for budget growth or schedule growth, as you deem appropriate.

Key: Higher scores go to firms that show a better record of on-schedule and on-budget performance, but points may be restored for firms that can show that schedule delays or budget inflation were not the fault of the firm.

D. Miscellaneous Considerations

1. Provide information for the last 5 years on any charges or violations of law and regulations, litigation, and claims (including pending and anticipated claims), Explain the issue and outcome or anticipated outcome.

Key: Higher scores go to firms with fewer charges, violations, and claims. Firms discovered to have failed to disclose such charges, violations, or claims receive zero points.

2. Other

This category is included for other items presented by the respondent. Inclusions may include standard firm promotional literature, testimonials, awards, corporate memberships in professional organizations or sponsorships, additional project/contract histories, etc.

Key: Points may be awarded to firms that show Minority Business Enterprise (MBE), Women’s Business Enterprise (WBE), Disadvantaged Business Enterprise (DBE), or Small Business Enterprise (SBE) certification. Points may also be awarded for evidence...
of especially excellent qualifications, such as awards or unique certifications, or for additional employee benefits, such as pension plans. Awarding of these points may be discussed with others on the evaluation team.

Company Name:__________________________________________

Signature:________________________ Date:_______________
Exhibit 3: Qualifications of Contractors

Scoring Sheet

Name of Firm ____________________________________________________________

Evaluator________________________________________ Date__________________

Scores should be awarded on a 0-5 (0 being the worst, 5 being the best) ranking scale in each qualification category. Scores within subcategories (e.g., 4a-4d) are averaged to provide a total of 5 points for each category. The sum of all scores constitutes 60% of the firm’s final rating.

A. PROJECT TEAM, STAFFING, TRANSPARENCY (PTST)
   1. Self Organization Affirmation
   2. Personnel Sources and Community Inclusion
   3. 80% State Residency Assurance
   4. Apprenticeship and Training Program
      4a. Program Qualifications & Project Integration
      4b. Length, Classroom Hours, & Accreditations
      4c. Investment in Program & Enrollee Costs
      4d. Program Participation and Graduation Rates
   5. Health Care Program
      5a. Benefits, Family Coverage, Employee Costs
      5b. Plan Availability & Employee Participation
      5c. Automatic vs. Opt-In Coverage
   6. Employee Grievance & Dispute Resolution Process

B. PROJECT APPROACH (Approach)
   1. Environmental Program
   2. Safety Program
      2a. Training & Courses
      2b. Written Plan & Project Integration
      2c. OSHA Violations & Rectification
      2d. Worker’s Comp. & EMR Record

C. PROJECT EXPERIENCE/ PAST PERFORMANCE (PEPP)
   1. Resume & Experience/Expertise
   2. Project History & On-time/On-Budget Record

D. MISCELLANEOUS CONSIDERATIONS (Misc)
   1. Charges, Violations, & Litigation
   2. Other Unique Qualifications & Considerations

TOTAL (max 60) __________
### Table 1: Contractor Scores

#### Contractor A

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Bid: $511,734  
Average Score: 27.86

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Bid: $346,084  
Average Score: 37.71

\(^a\)Note: PTST = Project Team Staffing, Transparency, Approach = Project Approach, PEPP = Project Experience/Past Performance, Misc = Miscellaneous Considerations. See Table 1 for details.
### Table 1 Continued: Contractor Scores

#### Contractor C

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Bid: $262,047  
Average Score: 38.86

#### Contractor D

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Bid: $241,650  
Average Score: 32.86

<sup>a</sup>Note: PTST = Project Team Staffing, Transparency, Approach = Project Approach, PEPP = Project Experience/Past Performance, Misc = Miscellaneous Considerations. See Table 1 for details.
### Contractor E

<table>
<thead>
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\(^a\)Note: PTST = Project Team Staffing, Transparency, Approach = Project Approach, PEPP = Project Experience/Past Performance, Misc = Miscellaneous Considerations. See Table 1 for details.

### Contractor F

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Table 2: Scoring Process Results

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<th>Rank Bid</th>
<th>SR Score</th>
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