

**Appendix B**

**Rubric for Evaluation of Proposals**

**PROPOSER'S NAME** \_\_\_\_\_

**COMMENTS:**

| <b>EVALUATION CRITERIA</b>  | <b>RATING</b>  |
|---|--|
| <p><b><u>Section A: Pricing</u></b></p> <ul style="list-style-type: none"> <li>● Break down cost</li> <li>● Addresses time assumptions to minimize exceeding total project cost</li> </ul>  | <p>Pricing Break-down Rating Scale<br/>                     1 = no cost break-down information provided<br/>                     3 = incomplete information<br/>                     5 = complete information</p> <p><b>Pricing Breakdown Rating:</b></p> <p>Proposed Price Rating Scale<br/>                     1 = pricing is high, does not provide high value<br/>                     3 = pricing is high and provides high value; or pricing is low but demonstrates limited value<br/>                     5 = pricing is low and provides high value</p> <p><b>Proposed Price Rating:</b></p> |
| <p><b><u>Section B: Operating Requirements</u></b></p> <ul style="list-style-type: none"> <li>● Process requirements: provides evidence of                             <ul style="list-style-type: none"> <li>○ design and implementation of process</li> <li>○ best practices</li> <li>○ institutional context</li> <li>○ measuring systematic difference in salary by gender</li> </ul> </li> <li>● Analysis requirements: provides evidence of                             <ul style="list-style-type: none"> <li>○ data validation</li> <li>○ methodology and assumptions</li> <li>○ model building techniques</li> <li>○ model results</li> <li>○ model diagnostics</li> <li>○ strengths and limitations</li> </ul> </li> <li>● Reporting requirements: provides evidence of                             <ul style="list-style-type: none"> <li>○ campus wide dissemination plan</li> <li>○ technical report</li> <li>○ computer output</li> <li>○ NSF grant requirements</li> </ul> </li> </ul> | <p>Operating Requirements Rating Scale<br/>                     1 = criteria not met/partially met; some evidence, but does not demonstrate ability to meet criteria.<br/>                     3 = criteria fully met; adequate evidence and demonstrates ability to meet criteria.<br/>                     5 = criteria exceeded; extensive evidence and provides relevant insights and additional details</p> <p><b>Process Requirements Rating:</b></p> <p><b>Analysis Requirements Rating:</b></p> <p><b>Reporting Requirements Rating:</b></p>   |

Appendix to:

Marchetti, C. E. & Bailey, M. B. (2022). The Importance of HOW in Faculty Salary Equity Studies: Development and Impact of an ADVANCE Salary Equity Study and Workshop Series to Promote an Inclusive Academic Environment, *The Advance Journal*.

|   |  |
|---|--|
| <p><b><u>Section C: Quality Metric/Performance Metrics</u></b></p> <ul style="list-style-type: none"> <li>● 2-3 month scope of work/timeline provided</li> <li>● Key deliverables outlined</li> <li>● Evaluation plan for process design, implementation, and communication described</li> </ul>  | <p>Quality/Performance Metrics Rating Scale<br/> 1 = criteria not met/partially met; some evidence, but does not demonstrate ability to meet criteria.<br/> 3 = criteria fully met; adequate evidence and demonstrates ability to meet criteria.<br/> 5 = criteria exceeded; extensive evidence and provides relevant insights and additional details</p> <p><b>Timeline Rating:</b></p> <p><b>Deliverables Rating:</b></p> <p><b>Evaluation Plan Rating:</b></p>  |
| <p><b><u>Section D: Evidence of Business Performance</u></b></p> <ul style="list-style-type: none"> <li>● Consultant Expertise - Analysis <ul style="list-style-type: none"> <li>○ compensation data analysis</li> <li>○ salary models</li> </ul> </li> <li>● Consultant Expertise – Communication <ul style="list-style-type: none"> <li>○ supportive communication planning</li> <li>○ similar compensation analysis/reporting</li> </ul> </li> <li>● Consultant Expertise – Context <ul style="list-style-type: none"> <li>○ within a higher education setting</li> <li>○ Preferred: at an NSF ADVANCE IT institution</li> </ul> </li> <li>● References –contact information and examples of work</li> </ul> | <p>Expertise Rating Scale<br/> 1 = very limited evidence of related experiences in required areas<br/> 3 = evidence of related experiences in all required areas<br/> 5 = evidence of related experiences in all required AND preferred areas</p> <p><b>Analysis Expertise Rating:</b></p> <p><b>Communication Expertise Rating:</b></p> <p><b>Context Expertise Rating:</b></p> <p>References Rating Scale<br/> 1 = no contact information, no examples<br/> 3 = contact info and examples provided<br/> 5 = contact info PLUS examples are high quality</p> <p><b>References Rating:</b></p> |
| <p><b><u>Section E: Sustainability (Green Strategy)</u></b></p> <ul style="list-style-type: none"> <li>● Sustainability Efforts</li> </ul>  | <p>Sustainability Rating Scale<br/> 1 = no info provided<br/> 3 = incomplete info provided<br/> 5 = complete info provided</p> <p><b>Sustainability Rating:</b></p>  |

|   |   |
|---|---|
| <p><b><u>Section F: Terms and Conditions</u></b></p> <ul style="list-style-type: none"> <li>• &lt;University&gt; Purchase Order Terms and Conditions Met</li> <li>• Bid Qualification Form Completed</li> </ul> | <p>Terms and Conditions Rating Scale<br/> 1 = no info provided<br/> 3 = incomplete info provided<br/> 5 = complete info provided</p> <p><b>Terms and Conditions Rating:</b></p> |
|---|---|

**OVERALL PROPOSAL RATING**

| Section | Section Weight | Criteria                  | Rating (1-5) | Item Weight |
|---------|----------------|---------------------------|--------------|-------------|
| A       | 15%            | Pricing Breakdown         | 1            | 5%          |
|         |                | Proposed Pricing          | 1            | 10%         |
| B       | 25%            | Process Requirements      | 1            | 5%          |
|         |                | Analysis Requirements     | 1            | 15%         |
|         |                | Reporting Requirements    | 1            | 5%          |
| C       | 20%            | Timeline                  | 1            | 7%          |
|         |                | Deliverables              | 1            | 7%          |
|         |                | Evaluation Plan           | 1            | 6%          |
| D       | 25%            | Expertise - Analysis      | 1            | 15%         |
|         |                | Expertise - Communication | 1            | 5%          |
|         |                | Expertise - Context       | 1            | 5%          |
|         |                | References                | 1            | 5%          |
| E       | 5%             | Sustainability            | 1            | 5%          |
| F       | 5%             | Terms and Conditions      | 1            | 5%          |
|         |                | <b>TOTALS:</b>            | n/a          | 100%        |