



Ride the Wave

POLICY FOR EVALUATING PROPOSALS

Proposal types:

Request For Qualifications (RFQ's),

Request for Proposals (RFP's),

Invitation For Bids (IFB's)

March 2003

Ground Rules

(1) Proposer identities, proposal contents, and prices shall be treated with discretion to avoid compromising results or giving unfair competitive advantage. Proposal information is often provided with a confidentiality provision which must be honored.

(2) The bid selection committee shall not discuss any aspects of the proceedings with anyone not designated as a bid selection committee member or Chairperson for this procurement. This applies even after award of the contract.

(3) Do not discuss the source selection evaluation with your supervisors, except to convey a general progress or status report. Do not discuss any details regarding the number of proposals, the identity of the proposers, their ranking, etc.

(4) Refer any attempted communication by proposers to the Procurement Officer.

(5) If additional information or clarification is needed on a proposal, the committee member shall score/rate the proposal as is and prepare written questions for ambiguous areas. The questions will be submitted to the Procurement Officer with the initial evaluation report. The Procurement Officer will seek the additional information or clarifications during negotiations. Unless otherwise instructed by the procurement officer, the bid selection committee is prohibited from contacting proposers to discuss their technical proposals. Generally speaking, any

such communication constitutes discussion and is to be performed by the Procurement Officer. Another acceptable format would be a "conference type" discussion consisting of the Procurement Officer, other bid selection committee members and the proposer.

(6) No gratuities shall be accepted from any proposer.

(7) Each bid selection committee member must read all proposals in their entirety to gain a general idea of content, and to look for obvious errors or omissions.

(8) If necessary, re-read proposals for detailed understanding. This will provide the basis for evaluation.

(9) When more than one bid selection committee member is assigned and ratings vary, individual bid selection committee members may revise and/or finalize their ratings/scores if, after discussions (but prior to submitting the ratings/scores to the Committee Chairperson), they see things differently or believe they made an error.

(10) After individual evaluations, a consensus rating value should be developed for each factor/sub-factor and/or the overall proposal. The bid selection committee should attempt to resolve all differences of opinion.

(11) Use only the rating values and scoring methodology specified on the evaluation sheets.

(12) When more than one bid selection committee member is assigned, final ranking is the responsibility of the Committee Chairperson.

Other Considerations

(1) Your evaluation may be supported by a narrative assessment identifying any strengths, deficiencies and omissions for each factor and sub-factor evaluated. Do not use phrases such as "looks good to me" or "strong write-up" in this area. (Note: To streamline the evaluation process, bid selection committee members should try to minimize write-ups by hitting the high points as succinctly as possible.)

(2) Do not downgrade a proposal because it did not address something we never asked for in the proposal.

(3) In evaluating strengths and deficiencies and in developing narratives and questions, proposal page numbers will be used to facilitate

discussions.

(4) All portions of the proposal should be analyzed based on the exact language appearing in the offer.

(5) Avoid the tendency to interpret the meaning of each proposal when writing is ambiguous.

(6) Recognize that the assignment of a rating value to a factor or sub-factor is subjective and based upon your best reasonable judgment.

(7) Recognize ambiguities, inconsistencies, errors, omissions, irregularities, and deficiencies that can affect scoring/rating.

(8) Recognize that proposers often use "catch phrases," buzz words, and technical acronyms which may indicate a less than thorough understanding of the solicitation.

(9) Recognize any substantial quality of the proposal. Look for content.

(10) Recognize flattery on the part of the proposer.

(11) Avoid forming "first impressions" of a proposer that might influence the rating value to be assigned.

(12) Advise the Procurement Officer if any proposals are totally unacceptable and would require a major rewrite.

(13) Keep a running list of questions for use during discussions. The questions should not be in the form of suggestions. Do not tell a proposer how to obtain a "perfect score."