Proposal Evaluation

Once the proposals have been reviewed and deemed responsive, the evaluation team may begin the evaluation process. The recommended method for evaluation is to have all team members in the same room evaluating the proposals at the same time. This will facilitate questions by team members to the purchasing staff or the technical experts. Purchasing staff and technical experts may answer technical questions regarding proposals. For example, if a proposal recommends the use of a software product one of the team members is not familiar with, the team member can discuss the pros/cons of this software with the technical expert. Team members who are unfamiliar with a particular respondent should not ask other team members about their experience with the respondent unless it was specified in the solicitation that factors other than price will be considered in determining which bid or proposal is the best value for the state.

Once the evaluations are complete, the team leader will collect all of the evaluation score sheets and proposals. The team leader totals the score sheets and verifies the accuracy of calculations for input into the final evaluation formula.

If it is apparent that one or more team members’ evaluations differ significantly from the majority, the team should discuss the situation to ensure the criteria was clear to all team members and that information was not overlooked or misunderstood. If after this discussion, a team member feels that he/she did not understand the criteria, the proposal requirement, or missed information that was included in the proposal, the evaluator, at his/her own discretion, may revise his/her evaluation score. The team leader must be present during these discussions to ensure that no team member tries to influence the decision of other team members. Under no circumstances should any team member attempt to pressure other members to change evaluation scores.

Typically, the cost information is scored by the Purchasing Department as cost is an objective criteria that can be calculated through predetermined formulas outlined in a spreadsheet. A sample of an evaluation score sheet is included in Appendix 14.

References
The evaluation team may verify any references included in the proposal and conduct any other reference or credit check deemed appropriate. The evaluation team may also use the Vendor Performance System in evaluating past vendor performance.

All reference checks must be documented in writing. The same script or format of questions must be used when conducting reference checks so that the results are consistent and fair to all respondents. A sample reference check form is provided in Appendix 8.

Sometimes it is difficult to obtain information from the references provided, either because the references have a policy of not providing reference information or because they cannot be reached in a timely manner. Depending on the importance of the procurement, agencies may want to consider using the following statement in the solicitation document in lieu of checking references for all respondents.

[Agency name] reserves the right to check references prior to award. Any negative responses received may be grounds for disqualification of the proposal.

By using this clause, agencies are not required to check references but may choose to do so. Whether or not to check references as part of the evaluation criteria is at the discretion of the agency based on the individual procurement.