Evaluator Guidance

Agency Education Resource – State of Delaware

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Contents

Purpose

This manual provides guidance to agency evaluators responsible for reviewing and scoring vendor proposals in a competitive solicitation.

The purpose of proposal evaluation is to ensure that each response is evaluated **fairly, consistently, objectively, and in accordance with the solicitation as issued**.

Evaluators are expected to use their professional judgment and subject-matter expertise while evaluating only the information provided in the proposal and applying the evaluation criteria established in the solicitation.

The guiding principle: Evaluate what the vendor submitted, against what the State asked for, using the criteria established in the solicitation.

Before You Begin

Before reviewing proposals, evaluators should understand:

- The purpose and scope of the solicitation
- The evaluation criteria
- The proposal submission requirements
- Any requirements specifically identified for evaluation
- The evaluation timeline and deadlines
- The process for submitting scores and comments

Evaluators should review the solicitation carefully before beginning their evaluation.

Remember

The solicitation establishes the **evaluation framework**. Evaluators should not create new requirements, standards, or preferences after proposals have been received.

If the solicitation does not identify something as an evaluation criterion, it generally should not be used as a basis for scoring.

Evaluate the Proposal – Not the Vendor

The evaluation is based on the **proposal submitted**, not on what an evaluator already knows about the vendor.

An evaluator may have worked with a vendor previously, have knowledge of the vendor's reputation, or have prior experience with the vendor's products or services. That information should not influence the evaluation unless the solicitation specifically identifies relevant past performance, references, or prior experience as an evaluation criterion.

Do:	**Do Not:**
Evaluate: • What the proposal says • What the proposal demonstrates • How well the response addresses the stated requirements • The quality and completeness of the response in relation to the evaluation criteria	Score based on: • Personal experience with the vendor • Vendor reputation • Prior relationships • Personal preference for a vendor • Assumptions about the vendor's capabilities • Information that is not part of the evaluation criteria

Example

Do not:	Instead:
I've worked with this vendor for years and know they provide excellent service.	The proposal provides a detailed approach to meeting the required service levels and identifies specific performance monitoring methods.

Key Question

Ask:	Not:
What does this proposal demonstrate in response to the evaluation criteria?	What do I already know about this vendor?

Stay Within the Stated Evaluation Criteria

The solicitation establishes the standards against which proposals must be evaluated.

Evaluators should not introduce new requirements, preferences, or standards after proposals have been received.

Before assigning a score, ask: **Is this something the solicitation told vendors we would evaluate?** If the answer is no, do not use that factor to independently increase or decrease a vendor's score.

Common Examples

An evaluator may personally prefer that a vendor:

- Use a particular software system
- Employ a particular staffing model
- Provide reports in a particular format
- Use a particular implementation methodology
- Have a particular type of industry experience

Those preferences should not influence the score unless they are relevant to the evaluation criteria established in the solicitation.

Remember: Evaluate the solicitation you issued—not the solicitation you wish you had issued.

If the evaluation reveals that an important requirement or preference should have been included, document it as a **lesson learned for a future procurement** rather than creating a new evaluation standard for the current solicitation.

Read the Entire Response Before Determining a Score

Do not necessarily score a criterion based only on the first location where information appears.

Vendors may address a requirement in multiple sections of their proposal. Before concluding that information is missing, make a reasonable effort to determine whether the vendor addressed the requirement elsewhere in its response.

At the same time, evaluators must not fill gaps in a proposal.

Do Not Assume

- "They probably do this."
- "This is standard practice in the industry."
- "They have done this for us before."
- "They must have the resources."
- "They probably intended to address this elsewhere."

The evaluation must be based on what the proposal demonstrates.

When Information Is Insufficient

If the proposal does not provide enough information for the evaluator to determine that a criterion has been satisfied, the evaluator should score the response based on the information actually provided.

Score Based on What the Proposal Demonstrates

A score should reflect the extent to which the proposal addresses the applicable evaluation criterion.

Consider:

- How completely does the response address the criterion?
- Does it demonstrate an understanding of the requirement?
- Does it provide sufficient detail?
- Does it clearly explain the proposed approach?

- Are important elements missing?
- Are there weaknesses or limitations relevant to the criterion?
- Does the response provide the information needed to support the assigned score?

Evaluators should not award points based on assumptions about what a vendor **could** do. Points should be based on what the vendor **demonstrated in its proposal**.

Explain Your Score

Evaluation comments should support the score assigned.

A reviewer should be able to read the evaluator's comments and understand why the proposal received that score.

For example, if a criterion is worth 10 points and a proposal receives 8 points, the comments should provide enough information to understand why the response did not receive 9 or 10 points.

Similarly, a low score should be supported by comments identifying the relevant weaknesses or omissions.

Weak Comment

"Good response." – This does not explain what was good about the response or why the evaluator assigned the score.

Stronger Comment

"The proposal provides a clear description of the implementation approach and identifies key milestones. However, it provides limited detail regarding how implementation risks will be identified and addressed." – The stronger comment connects the score to the proposal and the evaluation criterion.

A Good Evaluation Comment Should

- Be specific
- Be factual
- Refer to the proposal
- Relate to the applicable evaluation criterion
- Explain strengths and/or weaknesses
- Support the assigned score
- Avoid speculation
- Avoid personal opinions or bias

Use Professional and Business-Appropriate Comments

Evaluation comments are part of the procurement record. Evaluators should assume that their comments may be reviewed outside the evaluation team.

Comments should be written in a professional, objective, and business-appropriate manner.

Avoid Personal or Subjective Comments

Avoid	Use Instead
I don't like their approach.	The proposed approach does not address the required transition activities identified in the Scope of Services.
They don't understand the requirement.	The response does not demonstrate how the vendor will meet the stated requirement.
They can't handle this volume.	The proposal does not demonstrate how the proposed staffing model will support the required service volume.
This isn't how I would do it.	The proposed approach does not address [specific requirement].
They should have included more information.	The response does not provide sufficient detail regarding [specific criterion].

Focus on the Proposal

Use language such as:

- "The proposal demonstrates..."
- "The response identifies..."
- "The proposal does not address..."
- "The response provides limited detail regarding..."
- "The proposed approach includes..."
- "The response does not demonstrate..."
- "The proposal provides sufficient detail to..."

Do Not Make Assumptions

Evaluators must base their scores on the information provided in the proposal.

Do not assume:

- A vendor can perform something because of its reputation
- A vendor cannot perform something because of a past experience
- A vendor will use an approach because it has used it previously
- A vendor has resources that are not identified in the proposal
- A missing detail is "probably understood"
- A vendor's past performance will determine its future performance

Instead

If a proposal does not provide sufficient information, document that fact.

Example:

The proposal identifies a project manager but does not provide sufficient detail regarding the project manager's responsibilities or availability during implementation.

This is more useful than:

They don't have enough staff.

The first statement identifies what the evaluator actually observed. The second makes an unsupported conclusion.

Apply the Same Standard to Every Proposal

Evaluators score independently, and it is normal for evaluators to have different professional judgments and scores.

However, evaluators should apply the **same evaluation standard** to every proposal.

If one proposal receives a deduction because it does not address a particular element of a criterion, consider whether the same omission in another proposal would result in the same deduction.

Ask Yourself - *Would I apply this same standard if a different vendor submitted the same response?*

The vendor's name should not change the evaluation standard.

Consistency Does Not Mean Identical Scores

Independent evaluators may reasonably reach different conclusions.

Consistency means that evaluators:

- Use the same stated criteria
- Apply the criteria to each proposal
- Use the same general standard
- Base their decisions on the information provided
- Do not favor or penalize a vendor based on identity or prior experience

Maintain Independent Evaluations

Each evaluator must complete their evaluation independently.

During the independent evaluation period, evaluators should not discuss:

- Their scores
- Their rankings
- Whether they like or dislike a vendor
- What they believe another evaluator should score
- Whether they believe a vendor should win
- Their interpretation of a particular proposal with another evaluator

The purpose of independent scoring is for each evaluator to form their own professional judgment based on the solicitation and the proposal.

Important

Do not allow another evaluator's opinion to influence your initial evaluation.

If an evaluation meeting or consensus process is part of the procurement process, that process should occur **after independent evaluations have been completed** and in accordance with the established procurement procedures.

Risks of Poor Evaluation Documentation

Evaluation comments are more than notes for the evaluator. They are part of the procurement record and may be reviewed if a procurement decision is challenged.

Poor or inconsistent documentation can create questions about whether the procurement was:

- Fair
- Consistent
- Objective
- Based on the stated evaluation criteria

This can increase the risk of a vendor protest.

A protest may result in:

- Additional review and administrative effort
- Delays in the procurement
- Re-evaluation or corrective action
- Delays in contract award
- Cancellation of the solicitation
- Re-starting the procurement process and rebidding

Bottom Line

Poor documentation can put an otherwise sound procurement at risk. In the worst case, the solicitation may have to be cancelled and rebid.

Your score and comments should tell the same story:

What did the proposal demonstrate?
How did it address the criterion?
What strengths or weaknesses affected the score?

Before You Finalize Your Evaluation

Use the following checklist before submitting your evaluation.

Evaluation Checklist

☐ I evaluated the **proposal**, not my personal experience with the vendor.
☐ I evaluated the proposal against the **criteria stated in the solicitation**.
☐ I did not introduce my own requirements, preferences, or standards.
☐ I reviewed the proposal sufficiently before determining that information was missing.
☐ I based my score on what the proposal actually demonstrated.
☐ I did not make assumptions about the vendor's capabilities or resources.
☐ My comments explain the basis for my score.
☐ I explained significant strengths, weaknesses, omissions, or deductions.
☐ My comments are factual, objective, and business appropriate.
☐ My comments do not include personal opinions, speculation, or unsupported conclusions.
☐ I applied the same evaluation standard to each proposal.
☐ I did not allow the vendor's identity or reputation to influence my score.
☐ I completed my evaluation independently and did not discuss scores with other evaluators.
☐ I would be comfortable with the vendor reading my comments.
☐ My score and comments tell the same story.

Quick Reference

When evaluating a proposal, remember the following:

1. READ

Review the proposal and the applicable solicitation requirements.

2. COMPARE

Compare the vendor's response to the stated evaluation criterion.

3. ASSESS

Determine what the proposal demonstrates, not what you assume the vendor can do.

4. SCORE

Apply your professional judgment using the established scoring methodology.

5. DOCUMENT

Explain the strengths, weaknesses, and/or omissions that support your score.

6. REVIEW

Before submitting, make sure your comments are objective, professional, and consistent with your score.

Evaluate the proposal. Apply the stated criteria. Document your reasoning.

Your professional judgment matters—but it must be grounded in the solicitation and the proposal.