User Group Evaluating / Scoring

Request for Proposal

Government Support Services
website: gss.omb.delaware.gov

updated March 2014
Who Does What?

- RFP’s issued for central contracts
  - **Contract Officer:**
    - Review submissions for responsiveness and notify user group of any non-responsive proposals
    - Determine if any offerors are on federal excluded parties listing
    - Provide User Group members with a copy of each responsive offeror’s proposal and an evaluation /scoring form
    - Score the cost component of the RFP
  - **User Group (Evaluation Committee):**
    - Each member completes an evaluation / scoring form for each responsive proposal. Each score to be supported with a brief written explanation.
      - Scoring form matches evaluation criteria in RFP
      - Evaluators to work individually
      - Score all criteria except cost
      - Check the business references for each offeror
Confidentiality

• The need for confidentiality is paramount!

• Proposals received, evaluations sheets, communications between the Contract Officer and the user group are not to be disclosed outside of the user group

• A confidentiality breach may, at a minimum, result in the need to cancel the procurement.
  • A breach could also expose the State to litigation
Determining Responsibility and Responsiveness

- **Responsiveness**
  - Does the proposal contain all of the basic requirements identified in the ITB or RFP
    - Correct number of copies of proposal in required format
    - Required forms (RPP attachments /exhibits)
    - Submission of or compliance with any other criteria established in the RFP

- **Responsibility**
  - DE Code identifies the following as considerations for responsibility of the offeror:
    - Offeror’s resources (financial, physical, personnel, or other)
    - Offeror’s record of performance and integrity (references)
    - Whether the offeror is qualified legally to contract with the State
    - Whether the offeror supplied all necessary information (responsiveness)
    - Any other criteria established in the RFP
Example of Basic Scoring Criteria Included in a Request For Proposal

<table>
<thead>
<tr>
<th>Item</th>
<th>Criteria</th>
<th>Points</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Demonstrated experience in successfully providing services and equipment of a similar type on a similar scale</td>
<td>35</td>
</tr>
<tr>
<td>2</td>
<td>Methodology proposed in meeting the requirements set forth in the scope of services</td>
<td>25</td>
</tr>
<tr>
<td>3</td>
<td>Proposed timeline in meeting the requirements set forth in the scope of services</td>
<td>25</td>
</tr>
<tr>
<td>4</td>
<td>Appropriateness of costs as they relate to the proposed delivery of service and equipment</td>
<td>25</td>
</tr>
<tr>
<td>TOTAL</td>
<td></td>
<td>110</td>
</tr>
</tbody>
</table>
## More Defined Scoring Criteria

<table>
<thead>
<tr>
<th>Item</th>
<th>Criteria</th>
<th>Points</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Experience &amp; qualifications of the offeror’s proposed team members for this procurement</td>
<td>25</td>
</tr>
<tr>
<td>2</td>
<td>Offeror’s proposed methodology to meet the overall scope of work</td>
<td>25</td>
</tr>
<tr>
<td>3</td>
<td>Offeror’s ability to offer a solution compatible with the technical environment identified in RFP Section 2.5</td>
<td>30</td>
</tr>
<tr>
<td>4</td>
<td>Offeror’s implementation plan as identified in RFP Section 3.20</td>
<td>30</td>
</tr>
<tr>
<td>5</td>
<td>Offeror’s project plan, approach, and ability to meet milestones as identified in RFP Section 4.1</td>
<td>30</td>
</tr>
<tr>
<td>6</td>
<td>Offeror’s communicated methodology in addressing organizational change management</td>
<td>15</td>
</tr>
<tr>
<td>7</td>
<td>Proposed Cost</td>
<td>40</td>
</tr>
<tr>
<td>TOTAL</td>
<td></td>
<td>195</td>
</tr>
</tbody>
</table>

updated March 2014
# Partial Example of a Scoring Form

<table>
<thead>
<tr>
<th>Item</th>
<th>Criteria</th>
<th>Points Available</th>
<th>Evaluator Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Demonstrated experience in successfully providing services and equipment of a similar type on a similar scale</td>
<td>35</td>
<td>17</td>
</tr>
<tr>
<td></td>
<td>Evaluator Comment: <strong>Insufficient detail on service.</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Methodology proposed in meeting the requirements set forth in the scope of services</td>
<td>25</td>
<td>25</td>
</tr>
<tr>
<td></td>
<td>Evaluator Comment: <strong>well defined approach</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Proposed timeline in meeting the requirements set forth in the scope of services</td>
<td>25</td>
<td>21</td>
</tr>
<tr>
<td></td>
<td>Evaluator Comment: <strong>Time allotted for training is excessive</strong></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

*updated March 2014*
Important Points

• **Evaluate and score based only on the content of the proposal and the evaluation criteria**
  - Do not “read into” or dismiss proposal content based on any personal knowledge or perception of the offeror.
    - If an offeror fails to sufficiently address a component of the scope of work the scoring should reflect the degree of shortcoming.
    - If proposal content creates conflict with the terms, conditions, requirements outlined in the RFP this should be reflected in scoring.
  - Comments explaining the numerical score given should be short and to the point.
  - Yes, the user group is a team but for evaluations each team member works individually. Do NOT compare scores or notes with other evaluators.
  - The Contract Officer may provide past performance information. If provided, each evaluator may consider the impact on the proposal score.

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Remember It’s Public Information

• All evaluation forms should be objective and professional
  • Evaluation forms are public documents and subject to being made available through the FOIA process
    • Evaluator names are redacted from any documents made available through the FOIA process but if a bidder should pursue legal avenues evaluator names could be subject to disclosure.

• E-mails related to a procurement and any notes that might be taken during the evaluation process are also subject to disclosure through the FOIA and /or legal process.
Final Steps

• Contract Officer pulls the results together:
  • Tallies user group scores and includes cost scoring
  • Solicits best and final offers from offerors
  • Provides User Group with scoring summary and award recommendation

• User Group
  • Reviews / approves award recommendation

• Contract Officer brings the process to closure:
  • Negotiates terms and conditions where applicable
  • Issues award notifications
  • Creates a permanent record