



Evaluating Requests for Proposals

2021 Agency Purchasing Conference

Objectives

- ▶ Better understand the role of the RFP evaluation committee in the evaluation process
- ▶ Better understand the basis for awarding contracts utilizing the RFP method of procurement



Evaluating an RFP

- ▶ To determine which vendor can provide the service at the best value to the state of West Virginia



Evaluation Criteria

- ▶ Proposals are evaluated based on criteria set forth in the solicitation and information contained in the proposals
- ▶ The technical evaluation will be based upon the point allocations designated below for a total of 70 of the 100 points
- ▶ Cost represents 30 of the 100 total points

Evaluation Point Allocation:

Project Goals and Proposed Approach

- Approach & Methodology to Goals/Objectives (#) Points Possible
- Approach & Methodology to Compliance with Mandatory Project Requirements (#) Points Possible

Qualifications and experience

- Qualifications and Experience Generally (#) Points Possible
- Exceeding Mandatory Qualification/Experience Requirements (#) Points Possible

(Oral interview, if applicable) (#) Points Possible

Total Technical Score: 70 Points Possible

Total Cost Score: 30 Points Possible

Total Proposal Score: 100 Points Possible

Evaluation Criteria

- ▶ Only paper or faxed bids accepted
- ▶ Online proposals prohibited
 - ▶ Sealed bids
 - ▶ Cost exposed (no way to hide cost once opened)
 - ▶ Other consequences?



Evaluation Criteria:

Mandatory Requirements

- ▶ Failure to meet a mandatory requirement will result in disqualification
- ▶ Cross comparison on Meeting Mandatory Allowed
 - ▶ Vendor should describe how it meets or exceeds all the mandatory requirements
 - ▶ Best in class receives full points; points deducted from other vendor proposals as long as base mandatory requirement is met
 - ▶ Scores Included in technical score



Technical Evaluation

- ▶ Committee Member Independent Review
 - ▶ Re-review RFP document
 - ▶ Check mandatory requirements
- ▶ Review and independently score proposals
 - ▶ All proposals start with a perfect score
 - ▶ Deductions taken for deficiencies
 - ▶ Deductions also taken if cross comparison results in better or worse solution



Technical Evaluation

- ▶ If there was a mandatory pre-bid meeting, did lowest bidder attend?
- ▶ If an addendum was issued for the solicitation, did they sign the Addendum Acknowledgement form?
- ▶ Did the vendor propose alternate terms and conditions? If so, a signed WV96 will need to be provided prior to award



Technical Evaluation

- ▶ Collective Committee Member Evaluation Review
 - ▶ Discuss mandatory requirements
- ▶ Review independent scoring for each proposal
 - ▶ Discuss scores and reasons why score is appropriate
- ▶ Determine consensus score



Technical Evaluation

- ▶ Oral presentations
 - ▶ If established by the Agency in the Schedule of Events, all Vendors participating in the RFP will be required to provide an oral presentation
- ▶ Permitted for clarification only
 - ▶ May not alter, add, subtract, or otherwise modify the content of the vendor's proposal
- ▶ Agency may have set guidelines for oral interview/demonstration

Minimum Acceptable Score

- ▶ Determine which vendors meet the minimum acceptable score, known as MAS
 - ▶ 70% of the technical points available
 - ▶ 49 points in most typical RFPs
- ▶ Vendors not meeting MAS or failing to meet a mandatory specification are disqualified
- ▶ Contact your Purchasing Division Buyer prior to disqualification

Finalizing the Technical Evaluation

- ▶ Final evaluation signed by all voting members
- ▶ Submitted to the Purchasing Division
 - ▶ Buyer reviews for:
 - ▶ Clarity and consistency in deductions
 - ▶ Content
 - ▶ Scores (whole numbers)



Finalizing the Technical Evaluation

- ▶ Best Value Committee Review
- ▶ Cost opening
 - ▶ All cost bids are opened (FOIA/bid disclosure laws)
 - ▶ Only those vendors who meet the minimum acceptable score will have their cost considered



Cost Opening

Step 1: Lowest Cost of All Proposals / Cost of Proposal Being Evaluated = Cost Score Percentage

Step 2: Cost Score Percentage X Points Allocated to Cost Proposal = **Total Cost Score**

Example:

Proposal 1 Cost is \$1,000,000

Proposal 2 Cost is \$1,100,000

Points Allocated to Cost Proposal is 30

Proposal 1: Step 1 – $\$1,000,000 / \$1,000,000 =$ Cost Score Percentage of 1 (100%)
Step 2 – $1 \times 30 =$ Total Cost Score of 30

Proposal 2: Step 1 – $\$1,000,000 / \$1,100,000 =$ Cost Score Percentage of 0.909091 (90.9091%)
Step 2 – $0.909091 \times 30 =$ Total Cost Score of 27.27273

The Final Evaluation

- ▶ Add cost scores to technical scores
 - ▶ Show all math
 - ▶ Double check for accuracy
- ▶ Final consensus evaluation submitted to the Purchasing Division
 - ▶ Signed by all voting members
- ▶ Submit to the Purchasing Division for Final Best Value Committee review and award

The Final Evaluation

- ▶ Purchasing Forms that may be required prior to award
 - ▶ Purchasing Affidavit
 - ▶ Certifies that vendor does not owe any debt to the state in the amount greater than \$1,000.00
 - ▶ Date of vendor signature must match date of notary
 - ▶ Certificate of Insurance
 - ▶ Disclosure of Interested Parties form (if over \$1,000,000.00)

Contract Management

- ▶ Purchasing Division Procedures Handbook, Section 6.5
 - ▶ For contracts of commodities and services exceeding \$1 million, the following contract management procedures apply:
 - ▶ Post award conferences: Ensure a clear and mutual understanding of all contract terms and conditions and the respective responsibilities of all parties
 - ▶ Monitoring: Measure outcomes, monitor compliance with contract requirements, and assess contractor performance
 - ▶ Reports: Status reports and activity reports

Effective Evaluations



- ▶ A good evaluation can help:
 - ▶ Avoid protests
 - ▶ Prevent cancellations
 - ▶ Keep your name and/or project name out of the media
- ▶ Reduce bias and/or the appearance of impropriety
 - ▶ Ethics
 - ▶ Impartiality

Do you have any questions about Evaluating an RFP?

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