

PROPOSAL EVALUATOR GUIDELINES

RFP Name: Gender Equity Analysis

INTRODUCTION

- You have been selected to serve as an RFP evaluator. Thank you for your time and expertise. Your participation is an integral part of the procurement process. Therefore, it is imperative that you fully understand the policies regarding the RFP evaluation process, potential conflicts of interest, and the confidential nature of the proposals and their content.
- The purpose of this document is to provide a brief overview of the evaluation process and provide guidelines on evaluation conduct and responsibilities.

EVALUATION TEAM MAKEUP

- The evaluation team is a group of individuals chosen to evaluate a specific RFP. The team is generally made up of a non-voting procurement official and subject matter experts with knowledge of the service or combination of products and services being proposed.
- The evaluation team may designate a “lead” that is responsible for logistics including establishing timelines, booking conference rooms, and sending out meeting invitations. The lead may also be involved in creating and approving the final score sheet to evaluate the proposals.
- The role of the procurement officer is to assure that the evaluations are conducted in a fair and impartial manner and maintain complete records of the process. The procurement official also facilitates evaluation team meetings and must be present whenever there are any discussions with proposers. The procurement officer may perform an administrative review to ensure that all proposals are responsive to any minimum qualifications and all required forms have been submitted.

INSTRUCTIONS FOR EVALUATORS

- There should be no discussion of proposals outside of scheduled team meetings that are facilitated by the procurement officer.
- Do not discuss any aspect or opinion of the evaluation process with other evaluators or the public. This includes e-mails, as well as verbal communications. It is acceptable to discuss the process during evaluation team meetings (in the presence of a procurement officer) or with the procurement officer directly.
- To assure that evaluations are independent, proposals must be reviewed and evaluated with no assistance.
- If consultants are utilized, evaluators should only confer with them in a team setting with the procurement officer present.
- Always refer all questions/comments directly to the procurement officer.
- Do not give preferential treatment to any of the proposers. If you are contacted by any of the proposers during this evaluation, please refer them directly to the procurement officer. Do not respond to their inquiry and then refer them!

- If your job requires you to work with or contact representatives from any of the proposing firms on matters not related to the RFP, please limit this contact to avoid any perception of favoritism or conflict of interest.
- Never accept gifts, meals, or any type of gratuity from any of the proposers. Do not have meals, conversations, or contact with proposers, lobbyists, citizens or friends.
- To ensure uniformity in scoring, use the score sheets that you are provided. Please follow the instructions that should be included with each form. Do make notations, comments, etc. on the forms to assist in your evaluation. At this time, individual evaluation forms are not subject to public disclosure; however, you will be asked to submit your completed and signed evaluation sheets to the procurement officer at the end of the evaluation process.
- As a general rule, you must score every evaluation factor for the criteria you are being asked to evaluate. For example, if you are scoring technical criteria, you must score all of the evaluative elements in that section.
- Evaluators must evaluate and score only the material that you are provided (the proposals). Don't score based on hearsay ("I once heard....."). The evaluation process does allow the City to reconcile a prior experience with what was proposed. However, this may be done through reference checks, oral presentations, demonstrations, etc.
- Do not underestimate the importance of your role and the time commitment that is necessary to properly perform your duties as an evaluator. All team members must be present and participate in all team meetings. All team members must be present 100% of the time at oral presentations. Proposing firms will have solid ground for a protest if they become aware that evaluators are not present, leaving the room to take calls, etc.
- There is no secret scoring. In a team setting, all evaluators will be asked to provide a verbal summary of each proposal, and explain their resulting scores and rankings.
- When not evaluating, please make every attempt to secure proposals in a private area so that others cannot see them. At the conclusion of the evaluation process, proposals must be returned to the procurement officer.

CONFLICT OF INTERST AND CONFIDENTIALITY FORMS

- In addition to reviewing and acknowledging the guidelines in this document, evaluators are also required to read and sign the City's Conflict of Interest and Confidentiality forms.

I have read the above, and I understand and agree with these instructions:

Name (printed): _____

Signature: _____

Date: _____