




# RFP's - What's Important - Criteria/Setting Point System/Scores

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## Introductions

- Legal Disclaimer
  - The information presented here today should not in any way be construed as legal advice. Please consider the information we are presenting as “best practice recommendations,” based on our procurement experience at our individual organizations.



## Questions for the Audience

- Does your agency use boilerplate criteria, or do you revise the criteria to reflect the scope of work each time you issue a solicitation?
- Is price the most important criteria in a RFP for your agency, or are there other mitigating factors – service, critical delivery times, and maintenance?
- Do your end users have a say in the criteria, or do you set those standards?
- Does your agency review pricing before evaluating the rest of the RFP?



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## Benefits of a RFP

- The point of issuing a RFP instead of an IFB is to get the additional information your agency needs to make wise and inform source selections.
- Selecting criteria other than low price is as important as writing well defined scope of work/specifications.
- So whether your agency has created good boilerplate criteria, you also need to make sure that the criteria fit the requested products/services.

An additional benefit of RFPs is that your agency is allowed to conduct clarification/discussion to better understand the offer. After the clarification/discussion, you are required to issue Best and Final Offers. R7-2-1048





## What is Weighted Scoring?

- Weighted scoring is setting weights (or point values) for:
  - Requirements of the RFP (pricing, the scope of work/specification, certificate of insurance, financial information, vendor experience, maintenance); or
  - Any additional questions to help you make source selection (delivery time, maintenance schedule).
- Weighted scoring for criteria helps the evaluators to stay focused on what is important to the agency and avoid subjective opinions. (Good or bad past performance)
- Weighted scoring helps your agency determine which vendor meets your agencies' needs.



## Why Use It?

- Helps to create numerical rankings, which makes side-by-side comparison easier
- Weighted scoring helps support fact-based, decision-making – not just subjective opinions
- Focused priorities
- Identifies strengths and weaknesses of responders





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## What to Determine Before You Issue the Solicitation?

- What do you want to score (criteria)?
- What are your priorities – low price, delivery, service, or maintenance?
- What type of scale do you want to use – 100, 1000 points?
  - Question for the audience: Does anyone use 1000 points?

# Examples of Types of Scoring

- Price – 40 points
- Technical requirements – 30 points
- Management and Leadership (Experience) – 10 points
- References – 10 points
- Method of Approach to the project – 10 points

- Experience – 500 points
- Technical Proposal – 300 Points
- Price – 200 points

*Other criteria to consider:*

*Compliance to terms and conditions*

*Value engineering or innovation to a solution*

*Don't make your categories too broad or vague, as you might not get a true apples-to-apples comparison. Don't be afraid to ask specific questions for their method of approach or qualifications and experience.*



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## Using a Scoring Legend for Your Evaluation Committee

Criteria 1 - Price, including favorable pricing and volume discounts (30 Points)

- *Pricing determined by formula*
- **Criteria 2 - Conformance to the terms and conditions, scope of work, and specification documents in the solicitation (25 Points)**
  - 0-5 Many exceptions - Exceptions that will impact an awarded contract; and/or extremely limited scope of work
  - 6-9 Some exceptions - Exceptions that may impact an awarded contract, and/or very limited scope of work
  - 10-14 Some exceptions - Exceptions that shouldn't impact an awarded contract, or limited scope of work
  - 15-19 Few exceptions - Exceptions that shouldn't impact an awarded contract, and/or providing most of scope of work
  - 20-25 No exceptions; providing all or nearly all of scope of work

## Using a Scoring Legend for Your Evaluation Committee Cont.

**Criteria 3 – Primary Vendor Information: Complete response to the Method of Approach and Qualification and Experience pages, Certificate of Insurance, Company Financials (25 Points)**

- 0-10 Disorganized, hard to find/understand, most information missing, experience not demonstrated
- 11-15 Fairly disorganized, able to find some information/some information missing, minimal experience demonstrated
- 16-20 Organized, fairly easy to find everything and understand, most information provided, experience demonstrated
- 21-25 Very well organized, good information, easy to understand, all/nearly all information provided, experience demonstrated

## Using a Scoring Legend for Your Evaluation Committee conf.

### Criteria 4 – Support Contract Documents: Complete support and maintenance information, sample supplemental agreement (15 Points)

- 0-1 Disorganized, hard to find/understand, most information missing, agreement include unacceptable language
- 2-5 Fairly disorganized, able to find some information/some information missing, agreement include unacceptable language
- 6-10 Organized, fairly easy to find everything and understand, most information provided, agreement include some unacceptable language
- 11-15 Very well organized, good information, easy to understand, all/most all information provided, agreement language acceptable

## Using a Scoring Legend for Your Evaluation Committee cont.

**Criteria 5 – Additional Information: Additional vendor information (e.g. SDS, company contacts, maintenance schedule), timeline of project completion (5 Points)**

- 0 No information provided
- 1-2 Very limited additional vendor information, timeline of project not completed
- 3-4 Some additional vendor information provided, timeline of project completion provided; however, additional timeline information is needed.
- 5 All additional vendor information provided, timeline of project completion satisfactory



## Note on Scoring after including any Best and Final Offer responses

Information included in a response to best and final offer may impact the final score. Evaluator(s) must decide prior to their final scoring, the impact of the information that had been requested in the best and final offer to the offer as a whole. Evaluator(s) should document on their score sheet how the response to a best and final impacted their final score, e.g. deducted points for requesting the information, no impact on score if information was provided.

## RFP 17-D Evaluator's Score

Evaluator 1	ABC Company	XYZ Company
1-Pricing Information (Possible 30 Points)	25.10	30
2-Offer and Acceptance, Terms and Conditions, Scope of Work and Specification Documents (Possible 25 Points)	21.50	25.00
3-Primary Vendor Information (Possible 25 Points)	21.00	23.00
4-Supporting Contract Documents (Possible 15 Points)	13.00	14.50
5-Additional Information (Possible 5 Points)	5.00	2.50
Total	85.60	95

Evaluator 2	ABC Company	XYZ Company
1-Pricing Information (Possible 30 Points)	25.10	30
2-Offer and Acceptance, Terms and Conditions, Scope of Work and Specification Documents (Possible 25 Points)	23.00	23.00
3-Primary Vendor Information (Possible 25 Points)	22.00	24.00
4-Supporting Contract Documents (Possible 15 Points)	15.00	15.00
5-Additional Information (Possible 5 Points)	5.00	5.00
Total	90.10	97



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Evaluator 3	ABC Company	XYZ Company
1-Pricing Information	25.10	30
2-Offer and Acceptance, Terms and Conditions, Scope of Work and Specification Documents	24.00	25.00
3-Primary Vendor Information	24.00	25.00
4-Supporting Contract Documents	15.00	15.00
5-Additional Information	5.00	5.00
Total	93.10	100

	Evaluator 1	Evaluator 2	Evaluator 3	Heisman Rank
ABC Company	2.00	2.00	2.00	2.00
XYZ Company	1.00	1.00	1.00	1.00



## Scoring Do's & Don'ts

- **DO** be fair and consistent in the proposal evaluation and scoring.
- **DO** provide comments and accurate references. Your documentation is public information; remember not to include antagonistic or inflammatory comments.
- **DO NOT** evaluate or compare proposals against one another – score them in accordance to the RFP's criteria.
- **DO NOT** score based on criteria that is not included in the RFP.
- **DO NOT** “take it easy” or be “be overly hard”. Fairly evaluate all proposals against the requirements of the RFP.

### *Consideration –*

*Would you be able to defend your score in a debriefing conference or in a protest?  
Can you justify your 0 and 100 point scores?*

The background features a dark blue gradient with a large, stylized, semi-transparent 'MISSION' text in the upper left. A horizontal blue line with a slight gradient and a small arrow at the right end spans the width of the slide. In the upper right, there is a cluster of bright, multi-colored sparks or fireworks.

## Conclusion

- Pre-issue of RFP – Determine what your agency is looking to obtain and/or accomplish with this solicitation.
- Determine what criteria is most important and in what order of importance.
- Determine your points.
- Write your requirements to be associated to specific criteria.
- Justify your source selection by your weighted scores



## Closing Comments, Q&A

- Are there any additional questions from the audience?
- Thank you for coming and participating!