Wisconsin Department of administration

Division of Enterprise operations

DOA-3835I

(R 08/2019)

**RFP Evaluation Committee Report-Instructions**

This document provides instruction for how to complete form DOA-3835, Evaluation Committee Report.

The Evaluation Committee Report form DOA-3835, and all attachments must become part of the procurement file for an RFP. The report will be forwarded to the procuring agency head or staff with signatory authority prior to issuing an “Intent to Award” notice.

Complete the information box at the top of the page. The “Author” is the person writing the Evaluation Committee Report, typically the procurement lead.

**Section 1. RFP Scope**: Mirror the scope as stated in the RFP or summarize the scope to ensure that the intent is easily understood by a non-technical person.

**Section 2. Summary of RFP Development and Management Process**: Brief summary (one to two paragraphs) of the process used to develop the RFP as follows:

• Identify the agencies represented on the RFP development committee and the role the committee played in creating RFP requirements, evaluation criteria benchmarks and weights.

• Indicate whether any events such as proposer conferences were conducted, and if so, when and who attended.

• Identify whether any issues regarding the solicitation were raised that were not addressed in the response to vendor questions.

• Provide the calendar of events/milestones with dates

• Identify number of proposals submitted and who submitted them.

**Section 3. Evaluation Committee Composition**:

• Identify each scoring member of the Evaluation Committee person in the first column. In the next column, provide a brief description of the unique perspective this individual brings to the evaluation process. Additionally, identify if the person is employed by your agency, outside of the agency or outside of state government.

• Describe the efforts used to find evaluation committee members from outside the procuring agency and/or from outside state government. If it was determined that the use of an outside evaluator was not appropriate for the solicitation, explain that determination.

• If any exception was requested to the use of the guidelines outlined in 2006 Executive Order 137, describe the impact on the evaluation committee.

• Identify all non-scoring subject matter experts (SMEs) involved with advising the Evaluation Committee, including their name, agency and brief description of their expertise.

• In abstracting, scores of individual evaluators’ names are not tied to the scores represented on the final tabulation.

**Section 4. Summary of RFP Evaluation Process**: Include a description of the following:

• How was the initial evaluation done to narrow the initial proposers list?

• Were any proposals rejected, and if so, why and what point in the process?

• What point methodology was used to evaluate the RFP and what categories were evaluated? How were the weighting factors determined? What benchmarks for points were developed and by whom? When were benchmarks distributed and discussed with the evaluation team? It is important to write this section in a way that a non-technical person can understand the rationale for the way the RFP scoring methodology was developed.

• Were oral presentations conducted, and if so, when, who attended and which proposers were invited? Cover the following points:

o Evaluation committee determined the need for oral presentations

o Evaluation committee determined how information would be used and decided which proposers to invite

o Summary of process including committee discussion following oral presentations and scoring methodology

• Was a BAFO conducted? If so, what was included (price only; technical only; price and technical)

o How did the lead and/or evaluation committee determine the need for the BAFO process and how did they decide which proposers to invite, the content of the BAFO and scoring methodology?

• Were reference checks conducted? Which proposers were checked? How was that decided? Who developed the reference check questions and who conducted the reference checks? How were committee members informed of the reference check results?

• How did the committee reach its recommendation?

**Section 5. Evaluation Committee Meetings**: In column 1, briefly describe the reason for the meeting (e.g.: evaluation committee kick off meeting; general RFP specifications discussion; oral presentation).

In column 2, document the date of each meeting.

In column 3, provide a brief summary of the meeting (e.g.: “The Evaluation Committee met to review each specification and associated benchmark to ensure a common understanding of the RFP requirements.”). Include a summary of any meetings that were held to discuss scoring anomalies and the results of the meeting.

**Section 6. Evaluation and Disclosure of Cost**: It is common practice for cost to be independently scored by the RFP manager/procurement lead, and for evaluation committee members not to be provided with access to price or cost information prior to the completion of technical/functional scoring. If determined by the procurement lead to be in the agency’s best interests, a subject matter expert can be consulted to evaluate highly technical cost proposals, and/or the cost information can be shared with the evaluation committee prior to completion of technical or functional scoring. In this section, indicate how cost proposals were handled.

**Section 7. Summary of Award Recommendation**:

• Name of vendor(s)

• Statement that consensus of evaluation committee was reached or note any dissenting opinions

**Section 8. Signatures**: In the first column titled “Name”, identify each evaluation committee member who scored the proposals. Each person must write “agree” or “object” in the second column. If there is an objection, the person must clearly write the reason for his/her objection. Each person must sign his/her name in the “Signature” column and date the signature in the “Date” column.

**Attachments**: Attach the required documents and place an “X” in the box to ensure each was attached.