|  |  |  |  |
| --- | --- | --- | --- |
| State of Wisconsin  Department of Administration  Division of Enterprise operations  DOA-3721 (R 08/2019)  S 16.75 WIS STATS | |  | state bureau of procurement  101 East Wilson Street, 6th FLoor  PO Box 7867  Madison, WI 53707-7867  FAX (608) 267-0600 |
| Request for Proposal (RFP)  Evaluation Committee Checklist | | | | | |
| RFP Number and Title | |  | | | |
| Department/Division/Bureau | |  | | | |
| Agency Contact Person | |  | | | |
| Date | |  | | | |

The procurement lead must address the following items during the initial meeting of the evaluation committee.

REVIEW FORM DOA-3780: ASSURANCE OF COMPLIANCE WITH PROCEDURES AND ETHICAL GUIDELINES FOR PROPOSAL EVALUATION

Committee members must hold the proposals in strict confidence.

Do not discuss the proposals with anyone except the committee unless directed by the procurement lead/RFP manager.

Do not have any contact with the proposers except at the direction of the procurement lead.

Review list of proposers with evaluators and see if any conflicts of interest are apparent.

DISCUSS THE COMPLAINT PROCESS (PRO-307) AND THE VARIOUS STEPS INVOLVED.

REVIEW THE BASICS OF THE RFP PROCESS INCLUDING HOW THE EVALUATION WILL OCCUR, COMMITTEE DISCUSSION, COMMUNICATIONS AMONG EVALUATION COMMITTEE MEMBERS, SCORING CRITERIA AND TIMELINES (PRO-306, 307). SPECIFICALLY DISCUSS THE FOLLOWING:

Process for initial individual scoring. Determine whether evaluators will take proposals home to complete scoring. If so, discuss the need to secure proposals and maintain confidentiality. The evaluation committee individually scores each proposal against the RFP technical criteria or scoring benchmarks, not against each other.

Explain any worksheets and scoring guidelines to be used in the process.

Explain the difference between official evaluator scores and working notes. Working notes are for the sole use and benefit of the evaluation committee member, for the convenience of the evaluator and for discussion purposes. They may not be distributed to anyone in a written format.

Procedure by which the evaluation committee may submit questions to the procurement lead, to be asked of the proposers, to help clarify any ambiguities in the proposal. Requests for clarification must be in writing to the procurement lead, who will forward them to the proposers. Written responses are received by the procurement lead and are distributed to the evaluation committee members.

Procedure for discussions regarding scoring. The procurement lead for the evaluation committee may call a meeting for the purpose of clarifying and discussing an evaluator’s score. At this meeting the evaluation committee may discuss any variations in scoring of the technical criteria points. This does not mean scores will be discarded or changed, only reviewed. Based upon information/clarification shared during the discussion an evaluator(s) may elect to change his/her scores, however that is at the sole discretion of each evaluator.

Explain how cost scoring is completed, when and how the cost scores will be added to the evaluation committee’s scores. The RFP cost portion is scored according to the RFP scoring criteria.

Discuss how reference checks will be done. All references are asked the same set of questions, but the committee may split the reference checking among them, or one person may be assigned to complete this task.

DISCUSS ORAL PRESENTATIONS AND BEST AND FINAL OFFER PROCESS (See PRO-306, 308)

Decide the criteria to use for bringing in proposers for oral presentations. Discuss how any oral presentations will be scored.

Decide the criteria to use for bringing in proposers for best and finals offers. Discuss how best and final offers will be scored.

DISCUSS THE EVALUATION COMMITTEE REPORT (See PRO-306, 307)

Explain the purpose and content of the evaluation committee report.

Explain that the procurement lead or designee will draft the report.

Explain that all evaluators must sign the report.

Explain the process to express disagreement with the report.

DISCUSS THE PROCUREMENT FILE (See PRO-306, 105)

Describe the components of the procurement file as required by form DOA-3840, Procurement Recordkeeping Checklist, who will maintain it, and that all written documents (minus personal working notes) including e-mails related to the evaluation become part of the official file.

Explain that all contents of the file are subject to open records.

|  |  |
| --- | --- |
| Procurement lead Signature |  |
| Date of Meeting |  |

This document can be made available to individuals with disabilities upon request.