



Guide to Proposal Evaluations

Just as the Request for Proposal is often the suppliers' "first impression" of the buyer, the quality of proposals and the ensuing evaluation process speaks volumes for the efficiency, accuracy, and legitimacy of the procurement process... this can "make it or break it" for the stakeholders on the project! CPE's Foundations for Procurement Excellence™ lay the groundwork for a successful buy. Ensure that the procurement process is:

- **Fair** = all suppliers are given equitable treatment
- **Open** = maximize opportunities for competition
- **Transparent** = clearly and concisely state the scope requirements (as best as possible)
- **Integrity** = high ethical standards and being consistent in application of rules

Procurement Best Practices to Proposal Evaluations

- **Understand different types of evaluation criteria.** All evaluation criteria are "weighted" or "non-weighted". **Weighted** criteria are based on individual committee member evaluation scores (e.g., 1-10 rating) or numerical calculations (e.g., price). **Non-weighted** criteria are typically pass / fail (e.g., minimum qualifications) or reference information for procurement's review.
- **Create a Source Selection Plan (SSP).** The SSP describes how **the evaluation and scoring of proposals** will be conducted and serves as a guide for evaluators (plus, it serves as excellent documentation for auditors!). It explains the roles of procurement, evaluation procedures, how to manage potential conflicts of interest, and other critical items. The SSP should be finalized BEFORE releasing the RFP. CPE has created a free template for download at center4procurement.org.
- **Manage the Size and Composition of your Evaluation Committee.** Very small or simple projects should be assigned **3-5 evaluators**, while more complex project should aim for **5-7 evaluators**. CPE also recommends limiting the number of technically-oriented evaluators. Their insight can be invaluable but should be reserved for detailed "Procurement Clarification" sessions.
- **Avoid Consensus Meetings!** CPE resolutely **discourages all forms of consensus meetings**, where the committee gathers together and collectively decides numeric scores or on which supplier to further negotiate or award a contract. Consensus meetings waste time and introduce bias by embedding subjectivity into the evaluation process. Instead, procurement should simply calculate the average the evaluator scores to streamline the evaluation process – it is simpler, takes less time, and is easier to justify. It meets the Foundations of Procurement Excellence.
- **Use Standardized Proposal Forms.** A wide range of supplier proposals formats is difficult to navigate, creating confusion for all parties involved (suppliers, procurement professionals, evaluators). Instead, **transform all evaluation criteria to a proposal template form** with fill-in-the-blank spaces and tables.
- **Reduce the Length of Evaluated Documents.** Evaluators are frequently taxed with numerous commitments outside of the procurement for which they are assigned. CPE recommends to enforce proposal page limits (regardless of project size, type, and other factors). This approach helps reduce effort by the evaluators and assists the proposers in highlighting the key areas of their solution. Research has shown that setting page limits (among other changes) can reduce evaluation time by up to 50%.