

RFP Evaluation Committee Guidelines

RFP Evaluation Committee Objective:

The objective of an RFP evaluation committee is to provide UVM Purchasing Services (“Purchasing”) with a recommendation as to which vendor proposal is most responsive to the University needs specified in an RFP.

Committee Tasks:

In order to fulfill this objective, the committee members are required to perform the following tasks:

1. Develop a work plan and define committee member responsibilities.
2. Before the RFP is released, analyze requirements and develop evaluation criteria to be included in the RFP.
3. Evaluate and analyze proposals against established evaluation criteria.
4. Prepare a scoring report based on the established evaluation criteria. The scoring report requirement may be waived by Purchasing. (see sample scoring report)
5. Prepare a written recommendation for Purchasing’s review and approval. (see sample guidelines)
6. Be prepared to answer questions, support the recommendation, and aid in defending the award.

Committee Rules and Procedures:

1. Each committee member will be asked to sign an RFP Evaluators’ Conflict of Interest and Confidentiality Statement.
2. Vendor contact MUST be strictly through Purchasing during the RFP process. If a vendor contacts a member of the committee, the vendor must be referred to Purchasing Services. Committee members shall not partake in any individual meetings, telephone conversations, emails or any other direct contact with vendors (unless such contact is pre-approved by Purchasing).
3. The committee shall perform its functions in a fair and equitable manner as required by the University’s Code of Business Conduct.
4. Any items in question by the committee when reviewing bidder proposals shall be brought to Purchasing. Purchasing will draft the committee’s questions and send to the appropriate bidders. Responses by the bidder will be requested electronically via email to Purchasing and then forwarded to committee members.

5. After evaluating all vendor proposals, the committee may identify finalist for Purchasing to invite for negotiations and/or presentation of a best and final offer.
6. During the RFP process, the committee shall maintain complete confidentiality. No member shall communicate with anyone outside of Purchasing or the RFP committee with any preliminary information, results, bids, or internal workings. This will remain in effect until all bidders have been officially notified by Purchasing.
7. After the RFP process, any vendor requests for public record documentation shall be forwarded to Purchasing and processed through the VP of Executive Operations, in conjunction with the Office of the General Counsel.
8. The final evaluation and selection of a vendor must be approved by the Director of Purchasing Services.

Sample Guidelines:

- Excel - RFP Scoring Report
- Word - RFP Evaluation written recommendation guidelines

SAMPLE

RFP Number/Name		Vendor Name 1	Vendor Name 2	Vendor Name 3	Vendor Name 4
Pricing (per item/service/hour/etc.)		3.00	1.00	5.00	0.00
	Weighted multiplier 15	45.00	15.00	75.00	0.00
Service/Support					
authorized sales/service		3.00	3.00	3.00	
commitment to on-going end-user training		5.00	3.00	3.00	
commitment to meet/exceed minimum response/repair times		3.00	3.00	3.00	
demonstrated program for service/support		3.00	3.00	1.00	
	Average	3.50	3.00	2.50	
	Weighted multiplier 15	52.50	45.00	37.50	
Equipment/Technology					
equipment meets minimum requirements		3.00	3.00	3.00	
demonstrated ability to support existing technology		5.00	5.00	1.00	
demonstrated ability to integrate equipment/software into UVM environment		5.00	5.00	1.00	
	Average	4.33	4.33	1.67	
	Weighted multiplier 15	65.00	65.00	25.00	
Environmental Initiatives					
Energy Star certified equipment		5.00	3.00	3.00	
demonstrated program for recycling parts/toner		3.00	3.00	3.00	
waste reduction		3.00	3.00	3.00	
demonstrated electronic document management solutions		5.00	5.00	1.00	
	Average	4.00	3.50	2.50	
	Weighted multiplier 10	40.00	35.00	25.00	
References					
list of 5 current customers		3.00	3.00	3.00	
list of 3 customer accounts lost		3.00	3.00	0.00	
references within Higher Ed		3.00	1.00	1.00	
references were positive and consistent with requirements		5.00	5.00	1.00	
	Average	3.50	3.00	1.25	
	Weighted multiplier 5	17.50	15.00	6.25	
Documentation					
Completed RFP thoroughly		5.00	3.00	3.00	
Provided COI as requested		3.00	3.00	3.00	
Financial statements		3.00	3.00	3.00	
sample invoice		3.00	1.00	3.00	
Quarterly Report Samples		3.00	3.00	0.00	
	Average	3.40	2.60	2.40	
	Weighted multiplier 5	17.00	13.00	12.00	
TOTAL SCORE		237.00	188.00	180.75	0.00
Other Criteria Evaluators:					
	Scoring				
* Performance record		5 - Exceeds minimum requirements			
* Safty Record		3 - Meets minimum requirements			
* Relevent Experience providing similar services/projects of size		1 - Partially meets minimum requirements/unclear			
* Overall quality of Proposal (conforms with specs, terms, conditions, etc)		0 - Does not meet minimum requirements			
* Qualification of vendor personnel to be assigned					
* Specific relevant qualifications needed to ensure contract performance					

SAMPLE

RFP Evaluation - Written Recommendation Guidelines

RFP#:

RFP Title:

GUIDELINES:

The evaluation committee will need to prepare a written recommendation regarding the RFP evaluation. The committee should incorporate the scoring report and recommend an award to the vendor with the highest score (best proposal). The shaded areas below are examples to include in the written recommendation. This information will be filed with the RFP and likely available as a public record, if requested.

1. EXECUTIVE OVERVIEW:

A. STRENGTHS AND WEAKNESSES:

Provide a narrative paragraph or two on each vendor's response.

- Describe strengths and weaknesses of each response based on the stated evaluation criteria.
- Identify any areas that caused the committee to rate a vendor's response lower than others or to reject a response.
- For RFPs that include a scoring report, identify that you have included the score and total rank assigned to each vendor.

2. AWARD:

A. AWARD RECOMMENDATION:

Describe your recommendation for award.

- Identify which vendor(s) you are recommending for award based on their highest rank.
- Identify the dollar amount of the award per vendor.
- State if this dollar amount is annual or if it covers the entire contract period.
- Note: if award is greater than \$1 million, Board approval must be acquired prior to award. (please allow extra time for this approval process in your timeline)
- Attach any mutually agreed to modifications to the vendor's proposal resulting from any Purchasing approved negotiations with finalist.
- The final evaluation and selection of vendor must be approved by the Director of Purchasing Services.