



RFP Writing: Evaluation & Selection Criteria

Module 6: RFP Writing - Evaluation & Selection Criteria

In this module, you will:

- Understand how adding transparency to your evaluation criteria can help proposers gain better clarity on how the evaluation team will assess their proposals.
- Learn how tailored, well-organized proposal submittal requirements can facilitate an easier evaluation process.
- Draft a set of evaluation criteria and proposal submission requirements.

6.1 Best Practices

Evaluation and Selection Criteria

At this point in drafting your RFP, you probably have a good sense of what work you want a vendor to do! However, you will need to select the vendor best able to deliver the services required to achieve your goals. This module will help you learn more about how to draft a set of evaluation criteria to assess the proposals you receive. You will also develop a clear idea of the different components you would like a prospective vendor to include in their proposal.

Proposal Submission Requirements

A prospective vendor's proposal is the primary opportunity for the vendor to show how they can meet your goals, solve the problems you face, and accomplish the scope of work. Generally, the proposal will be an opportunity for the proposer to tell you about how they meet your service requirements, what budget they can offer, whether they have the skills and qualifications you seek, and whether they have strong past performance doing similar work. The information you ask the proposer to submit should be the information you truly need to make a decision!

Depending on the RFP content, proposal submission requirements will vary. Regardless of the proposal submission requirements you include, it is important to put yourself in the shoes of the proposer, and to check that the submission requirements are clear and directly tied to either evaluation criteria, or government legal and policy requirements.

Sometimes, it can make sense to minimize requiring long narrative responses and instead ask for multiple short answer responses in a questionnaire format. By asking shorter, tailored questions, you can often solicit specific needed information about a proposer's experience, or understand the unique way they might approach a problem you have. This also allows you to focus vendors on your department's priorities for service delivery and tie successful responses to addressing these priorities.

Often, it is also beneficial to provide a separate submission template and budget template, incorporating all of the required information and questions you need a vendor to answer (rather than embedding this information in the RFP text), which can make it especially easy for a vendor to understand what they will need to submit in their proposal. Both minimizing the burden of multi-page narratives and using submission templates can also make responses more consistent and easier to evaluate.

Developing Evaluation Criteria

In an RFP, you have the opportunity to consider factors other than the lowest bid in how you select your vendors. The cumulative set of evaluation factors should allow you to identify the best solution or vendor that meets your full set of needs. Developing evaluation criteria that fairly and accurately assess what a proposer can bring to the table and how well their proposal meets your goals, budget, and service requirements is a key step in making sure that your procurement is results-focused. You certainly will not be able to meet your intended outcomes if you have not hired the right vendor for the job!

Furthermore, by clearly spelling out “how you will choose” from the proposals you receive, you help the proposer further understand your vision of success by articulating all the factors that you predict would enable a vendor to be a successful partner for your jurisdiction. As an example, consider an RFP that selects a vendor based 70% on price, and 30% on staff’s prior experience. By omitting a category around “project plan” or “approach”, you will not know about the vendor’s plan for how to accomplish your goals.

KEY CONCEPT: CHARACTERISTICS OF GOOD EVALUATION CRITERIA

1	<p>Connect to your specific outcome goals, metrics, and scope of work.</p> <p>The evaluation criteria should flow from the prior sections of your RFP, as a logical continuation of your goals, metrics, and scope of work.</p>
2	<p>Give the right balance between multiple priorities.</p> <p>The evaluation criteria generally should not weigh any one criterion too highly. If one criterion heavily outweighs the others, make sure you have good justification, and understand how the weighing might strongly influence selection. For example, focusing too heavily on price can come at the detriment of other equally important evaluation criteria that might help you assess the vendor’s ability to deliver results.</p>
3	<p>Provide sufficient information to let proposers know what a successful response looks like.</p> <p>Generally, you and your evaluation committee should have a clear idea of what a high scoring proposal would look like in each criterion before evaluations begin. Depending on the RFP, it can be helpful to share this information with proposers. Furthermore, if a criterion includes multiple different sub-components, designating points for the sub-components can help proposers and reviewers pay sufficient attention to each unique dimension of a criterion. For example, you might have a category called “work experience,” but within that category you might designate points for each different aspect of “work experience,” which could include components such as “project management experience” and “municipal finance experience.”</p>
4	<p>Clearly align to proposal responses and submittals requested.</p> <p>Each evaluation criteria should connect to one or more pieces of information that a proposer submits. Take time to reflect on each piece of information that you are asking a proposer to submit and consider whether it will tell you what you need to know to assess a proposer on the evaluation criterion to which it corresponds.</p>
5	<p>Are fair to all proposers, free of bias, consistent, and not overly restrictive.</p> <p>You should ensure that all evaluation criteria are fair, and do not give a preference to incumbent vendors. If you are establishing minimum requirements, they should not be so limiting that they weed out vendors who could actually perform the job well, especially small and minority firms. What underlying biases might be present in your evaluation criteria, the makeup of your evaluation panel, or in the evaluation process that could unnecessarily advantage or disadvantage certain types of proposers?</p>

6.2 Example

The example below shows evaluation criteria from a city that issued an RFP to hire a local non-profit to administer and manage an economic mobility program that had previously been run in-house. In this RFP, by sharing the relative importance of the evaluation criteria, and by breaking out the specific qualification areas that the city was interested in knowing more about, the city was able to have an improved understanding of a proposer's specific strengths and qualifications. In the right column, we share what the city asked proposers to submit in each qualification area.

EVALUATION CRITERIA	
<i>Qualification Area</i>	<i>Proposal submittal information</i>
<p>ORGANIZATIONAL CAPACITY AND EXPERIENCE (XX%) Based upon the respondent's overall capacity and experience that is relevant to the work in this RFP, and demonstrated ability to provide successful program management, technical and data expertise, partnership management, and fundraising efforts during the term of the contract. The City understands that an organization might need to hire for new capacity, and may give full credit to responses that present a thoughtful, realistic plan about how new capacity and expertise will be hired or developed.</p>	<p>Five short-answer questions asking about the proposer's capacity and experience in relevant topic areas.</p>
<p>METHOD OF APPROACH (XX%) Referring to the soundness of the proposer's planned approach to the project, including ability to address current and future challenges, planned approach to working in partnership with the City, evidence of organizational buy-in, and proposed staffing approach.</p>	<p>Four short-answer questions asking about the proposer's approach, ability to tackle challenges outlined in the RFP, and plan to work collaboratively with the City.</p>
<p>EQUITY AND ECONOMIC MOBILITY APPROACH (XX%) Based upon the respondent's understanding and planned approach to address equity and economic mobility in program design, execution and administration.</p>	<p>Three short-answer questions assessing the proposer's ability to consider equity in their efforts and understand the needs of the target population.</p>
<p>BUDGET AND RESOURCE ALLOCATION (XX%) Referring to the respondent's planned approach to allocate City financial resources and ability to supplement those resources with in-kind or outside support. The Issuing Office reserves the right to negotiate a final project price and scope in accordance with the City Code of Ordinances.</p>	<p>Proposers completed a cost proposal outlining their plan to allocate financial resources and supplement with outside or in-kind support.</p>

MODULE 6: WORKBOOK

6.3 DISCUSSION QUESTIONS

Gather your RFP drafting team and discuss the questions below.

1. Think back about the goals and scope of work that you drafted. For each of those goals, what would you need to know about a company to know whether they could meet those goals and accomplish your scope of work?

2. Imagine the perfect vendor -- one that would lead to 100% satisfaction at the end of the contract. Put down a few words about your “dream” vendor. What experience and qualifications would they have? How would you work with them? What staff would be on the project? What price would they offer?

3. Do you have any absolute requirements that a prospective vendor would need to meet for you to consider them for this project/service?

Note: Consider the minimum amount of experience, qualifications, licenses, or permits needed. However, remember that you do not want to be too restrictive or you may disqualify a perfectly capable vendor, or a small or minority business very capable of doing the work! If something is not a deal breaker, but rather a preference, consider whether you could incorporate it in the evaluation criteria rather than as a minimum requirement.

4. (Optional) If you anticipate awarding multiple contracts from this RFP, what information will you collect from proposers that helps you to distribute the work among selected vendors?

Note: Consider whether you need unique evaluation criteria for different service types, or whether you need proposers to tell you what areas of the city/or types of work they are interested in being considered for.

6.4 DRAFTING PROMPTS

1. Drawing on your responses from the above set of questions, write a set of evaluation criteria that reflect the characteristics of good evaluation criteria, which you will include in your RFP. As you write these, remember that clear, reasonable criteria will also make the process easier for your evaluation team. Include the percentage weight of the total that each evaluation criterion will be worth (or number of points), and a few sentences describing what a top score would look like for each criteria. The first row provides an example answer.

Evaluation Criterion	% of total points (or number of points)	What would a top score look like?
<i>Example: Performance History</i>	<i>Example: 20% of total</i>	<i>Example: Proposer has no history of major performance problems as reported in their proposal, and all references report excellent quality work.</i>

2. After drafting your evaluation criteria, consider what information a proposer will submit to allow you to assess how well they meet the criteria. Using the table below, indicate in the first column: the evaluation criterion, and in the second column: what a proposer will submit that connects to that evaluation criterion.

Note: If price, be clear about how the price information will be collected – fixed lump sum cost? Monthly cost? Additionally, it can often be helpful to conduct interviews or product demos to help you go beyond just written responses to know whether a company is qualified to help you reach your goals (especially as part of a second round evaluation). Finally, for submission requirements that do not align with the evaluation criteria but exist for legal or policy reasons, put N/A under the evaluation criterion it connects with.

Evaluation Criterion	Proposal Submission Component	Notes
<i>Example: Past Experience</i>	<i>Example: Short Answer Question - "Please tell us about your experience providing similar services to City governments."</i>	<i>Example: Proposer will submit a 400-word overview of their experience providing similar services to City governments.</i>