

## Proposal Evaluation

Once the proposals have been reviewed and deemed responsive by the Purchasing Department, the evaluation team shall be provided with the qualified responses. Most evaluations are conducted in the same room evaluating the proposals at the same time. This will facilitate questions by team members to the purchasing staff or the technical experts. However, it is possible to have evaluation members working from their respective workspaces. Purchasing staff and technical experts need to be available to answer technical questions regarding responses. For example, if a proposal recommends the use of a software product one of the team members is not familiar with, the team member should discuss the pros/cons of this software with a technical expert if the evaluation member is allowed to do so by the evaluation guide; otherwise, if not allowed to conduct independent conversations, all questions must be presented to the team leader, who may seek out the answers to such questions. Evaluation team members should only ask questions in the areas related to the evaluation criteria presented in the solicitation document or the evaluation guide.

Once the evaluations are complete, the team leader will collect all of the evaluation score sheets and responses. The team leader totals the score sheets and verifies the accuracy of calculations for input into the final evaluation formula.

If it is apparent that one or more team members' evaluations differ significantly from the majority, the team leader should conduct a meeting with all team members to discuss the situation to ensure the criteria was clear to all team members and that information was not overlooked or misunderstood. If after this discussion, a team member feels that he/she did not understand the criteria, the requirement, or missed information that was included in the response, the evaluator, at his own discretion, may revise his evaluation score. Under no circumstances should any team member attempt to pressure other members to change evaluation scores.

It is recommended that the cost or price information be scored by the Purchasing Department as cost/price is an objective criteria that should be calculated through predetermined formulas outlined in a spreadsheet. A sample of an evaluation score sheet is included in **Appendix 12**.

### References

The evaluation team may verify any references included in the proposal and conduct any other reference or credit check deemed appropriate. This activity may also be accomplished through the Purchasing Department that would contact all references and attempt to receive answers to questions developed by the evaluation team. The evaluation team may also use the Vendor Performance System in evaluating past vendor performance. [http://www.window.state.tx.us/procurement/prog/vendor\\_performance/](http://www.window.state.tx.us/procurement/prog/vendor_performance/)

All reference checks must be documented in writing. The same script or format of questions must be used when conducting reference checks so that the results are consistent and fair to all respondents. A sample reference check form is provided in **Appendix 8**.

Sometimes it is difficult to obtain information from the references provided, either because the references have a policy of not providing reference information or because they cannot be reached in a timely manner. Depending on the importance of the procurement, agencies may want to consider using the following statement in the solicitation document in lieu of checking references for all respondents.

*[Agency name] reserves the right to check references prior to award. Any negative responses received may be grounds for disqualification of the proposal.*

By using this clause, agencies are not required to check references but may choose to do so. Whether or not to check references as part of the evaluation criteria is at the discretion of the agency based on the individual procurement.