Training Series

Number	Title
Module 1	Introduction to Local Governance Policy
Module 2	The Local Workforce Development Board
Module 3	Competitive Procurement 3A: Workforce Procurement Introduction, Standards & the LWDB's Role in Procurement
	Competitive Procurement 3B: Competitive Procurement Process
	Competitive Procurement 3C: Procurement Monitoring & RFP Best Practices
Module 4	Competitive Procurement: Evaluating Proposals
Module 5	Setting Up Clear Agreements

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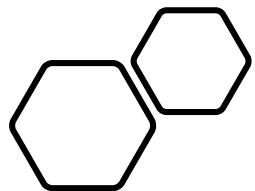
Application Guide

As you go through this training, you will see these icons which indicate a prompt for reflection. You can:

1. Pause the training and do the prompt, OR

2. Complete the training and then go through the guide.

Agenda

Welcome/ Introduction

Evaluating RFP Best Practices

Evaluation Phase of Procurement

Wrap Up

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Objectives

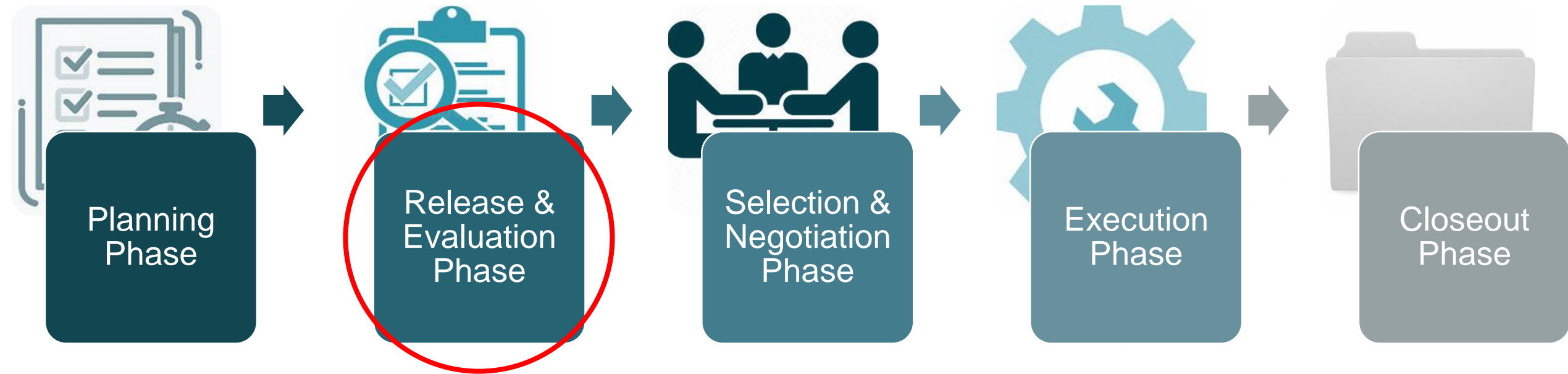Explain the importance of proposal scoring in competitive procurement.

Describe key aspects of the evaluation phase of competitive procurement process.

Apply RFP evaluation best practices in selecting the best proposal response.

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The Evaluation Phase of the Competitive Procurement Process

Evaluating and Scoring Proposals

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Review – Competitive Procurement Process

Planning Phase → Release & Evaluation Phase → Selection & Negotiation Phase → Execution Phase → Closeout Phase

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Review – Release & Evaluation Phase

Promote Competition

Collection of Proposals

Evaluate & Score Proposals

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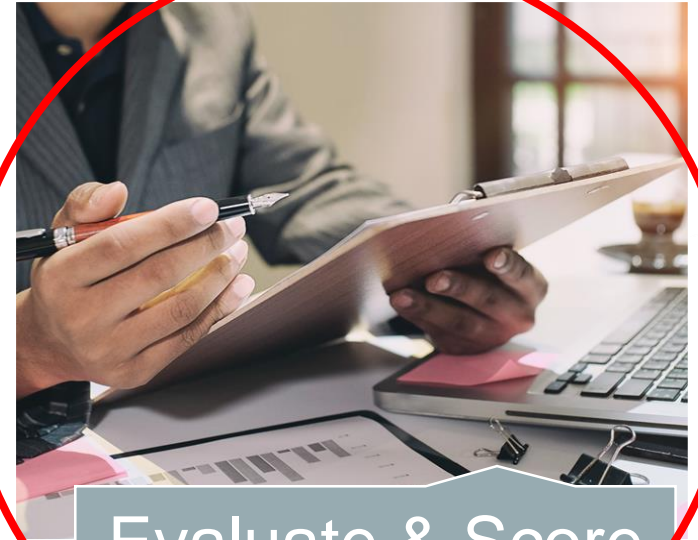
Review - Evaluate & Score Proposals

Review scoring procedures → Establish competitive range → Conduct evaluation & scoring

Document results ← Decide recommendation

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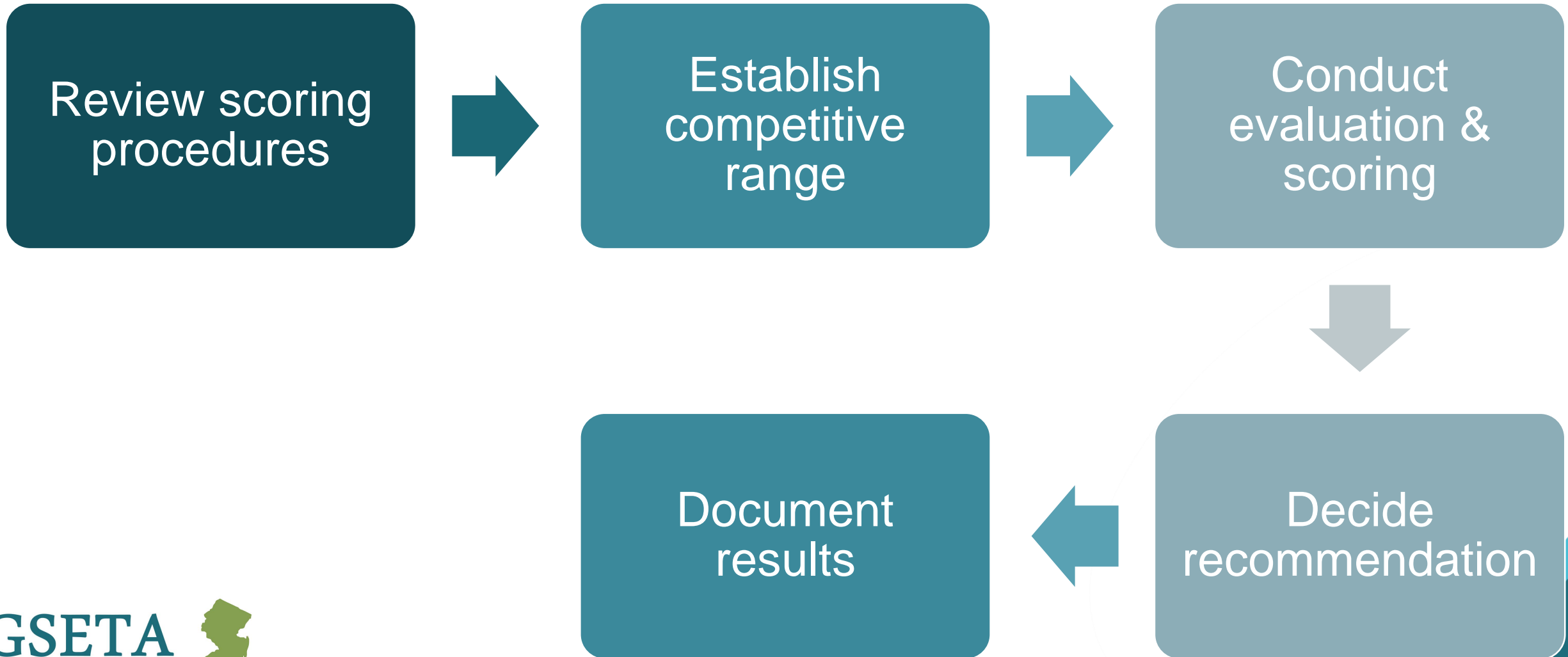
Review Scoring Procedures: Importance of Scoring

Scoring with a rubric that incorporates evaluation criteria allows you to:		
Grade proposals objectively and fairly	Identify a proposer's strengths and weaknesses	Compare and contrast prospective service providers

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Review Scoring Procedures: Evaluation Criteria & Rubric

Use Evaluation Criteria

To Make a Rubric

With Different Sections (and Weights)

Review Scoring Procedures: RFP

Example of information shared in RFP:

Proposal Review Scoring Rubric	
1 & 2. Cover Sheet and Executive Summary	Required, but not scored
3. Organization Description	20 points
4. Program Narrative	60 points
5 & 6. Program Costs/Budget	20 points
7. Attachments	Used to support scores of related proposal sections
Total Points Available	**100 points**

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Review Scoring Procedures: Model Evaluation Criteria

1. Technical criteria:

i. Proposed methodology:

(1) Does the vendor's proposal demonstrate a clear understanding of the scope of work and related objectives?

(2) Is the vendor's proposal complete and responsive to the specific RFP requirements?

(3) Has the past performance of the vendor's proposed methodology been documented?

(4) Does the vendor's proposal use innovative technology and techniques?

ii. Are sound environmental practices such as recycling, energy efficiency, and waste reduction used?

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Review Scoring Procedures: Model Evaluation Criteria

2. Management criteria:

 i. Project management:

  (1) How well does the proposed scheduling timeline meet the contracting unit's needs?

  (2) Is there a project management plan?

 ii. History and experience in performing the work:

  (1) Does the vendor document a record of reliability of timely delivery and on-time and on-budget implementation?

  (2) Does the vendor demonstrate a track record of service as evidenced by on-time, on-budget, and contract compliance performance?

  (3) Does the vendor document industry or program experience?

  (4) Does the vendor have a record of moral integrity?

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Review Scoring Procedures: Model Evaluation Criteria

2. Management criteria (continued):

iii. Availability of personnel, facilities, equipment and other resources:

(1) To what extent does the vendor rely on in-house resources vs. contracted resources?

(2) Are the availability of in-house and contract resources documented?

iv. Qualification and experience of personnel:

(1) Documentation of experience in performing similar work by employees and when appropriate, sub-contractors?

(2) Does the vendor make use of business capabilities or initiatives that involve women, the disadvantaged, small and/or minority owned business establishments?

(3) Does the vendor demonstrate cultural sensitivity in hiring and training staff?

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Review Scoring Procedures: Model Evaluation Criteria

3. Cost criteria:

i. Cost of goods to be provided or services to be performed:

(1) Relative cost: How does the cost compare to other similarly scored proposals?

(2) Full explanation: Is the price and its component charges, fees, etc. adequately explained or documented?

ii. Assurances of performance:

(1) If required, are suitable bonds, warranties, or guarantees provided?

(2) Does the proposal include quality control and assurance programs?

iii. Vendor's financial stability and strength:

(1) Does the vendor have sufficient financial resources to meet its obligations?

See **N.J.A.C. 5:34-4.2 Model evaluation criteria** for reference

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Review Scoring Procedures: Rubric

A **rubric** is a tool for analysis and assessment, which helps support objective evaluation.

In the competitive procurement process, a rubric:
- ✓ Is developed at the board level, before the scoring occurs
- ✓ Allows for considering both the *completeness* as well as the *quality* of the proposal
- ✓ Should mirror the RFP in its sections

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Review Scoring Procedures: Rubric Example

Program Narrative	Score: 0	Score: 1	Score: 2	Score: 3
Program Description	Program descriptions are unclear or do not address the RFP.	Program descriptions address some of the standards, expectations and outcomes of the RFP.	Program descriptions address standards, expectations, and outcomes in the RFP.	Strong program descriptions address the standards, expectations and outcomes in the RFP. Innovative ideas and technologies are incorporated.
Staffing Plans	Staffing details are not addressed and no specific plan is included.	Staffing plan is included but offers few specific details regarding roles and responsibilities.	Staffing plan with roles and responsibilities is included.	Detailed staffing plan with roles and responsibilities are included.
Community Engagement	Details regarding community engagement, including partner collaboration and community outreach are inadequate and/or missing.	Proposal addresses community engagement, including partner collaboration and community outreach but has inadequacies.	Proposal adequately addresses community engagement, including details regarding partner collaboration and community outreach.	Proposal clearly addresses community engagement, including strong plans for partner collaboration, and community outreach.
Program and Industry Knowledge	Vendor lacks programmatic and industry expertise and/or experience.	Vendor documents limited programmatic and industry knowledge and/or experience.	Vendor documents some programmatic and industry knowledge and/or experience.	Vendor documents programmatic and industry expertise and experience.

Establish Competitive Range

"**Competitive Range**" refers to the scores of proposers who have a reasonable chance at being selected. It can be used to advance excellent proposals to a next step.

Establish Competitive Range
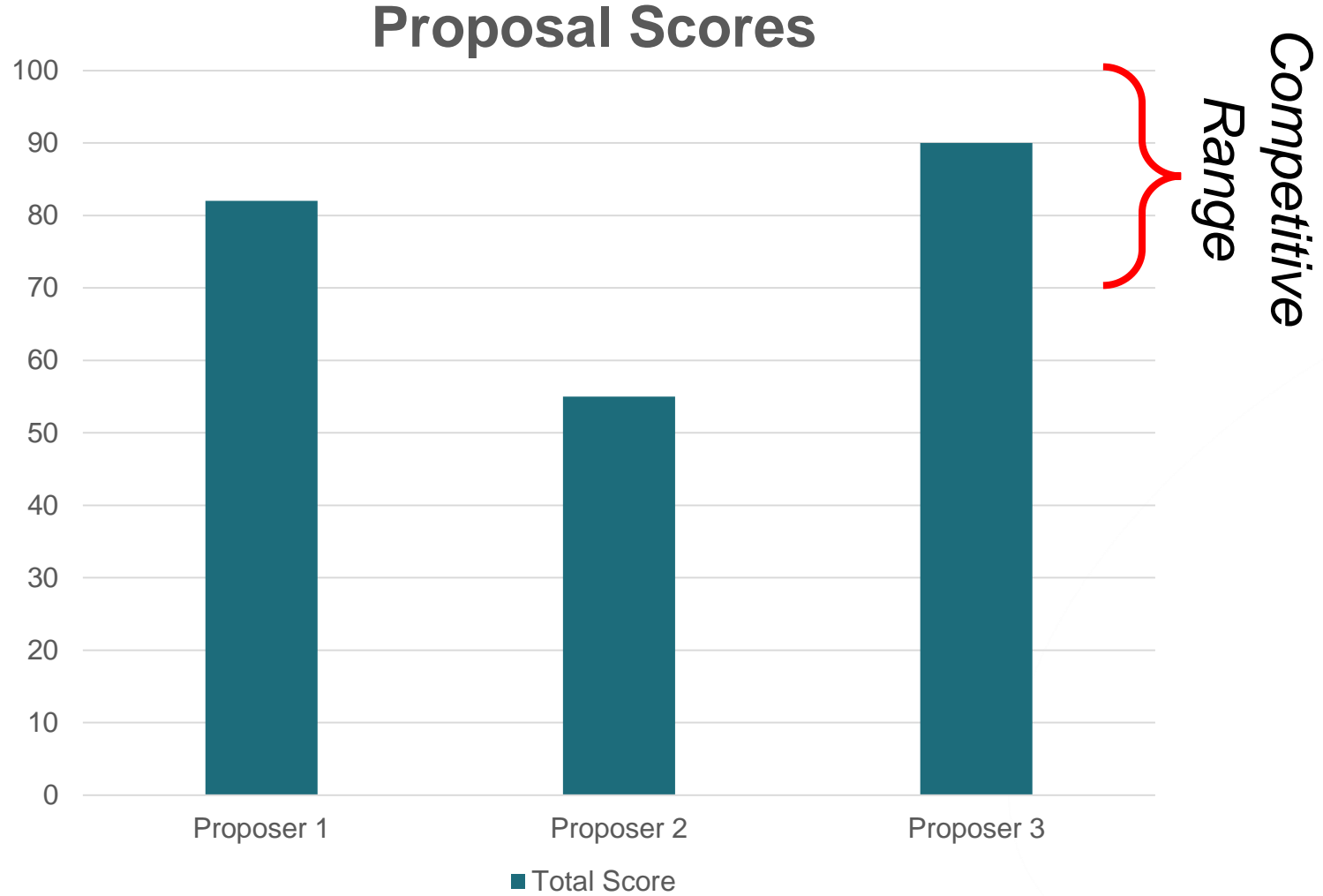
Conduct Evaluation & Scoring

✓ The review team individually reviews and scores each proposal, using the rubric.

✓ Score cards are collected and a summary is created.

Conduct Evaluation & Scoring

Ways to Leverage Review Team:

✓ The review team decides to recommend the highest scorer (recommended best practice)

✓ The review team discusses proposals in the competitive range

✓ Optionally, the proposers can be contacted for clarity.

Decide Recommendation

The Executive Committee may first vote on the matter.

The review panel recommends a proposal for selection.

LWDB votes to select the recommended proposal.

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Suggested Language & Documentation of Results

Selected Proposer

- Learn at the board meeting.
- Afterward, email or phone call quickly notifying of selection, followed by formal letter.

Non-Selected Proposers

- Learn at the board meeting.
- Afterward, email with an attached letter notifying each proposer that they were not selected.

Improving Future RFP Cycles

It is in the best interest of the LWDB to expand the pool of proposers, in quantity *and* quality, for future RFP cycles.

An individual proposer can request more details or a follow up meeting

What If…?

✓ Insufficient number of proposals are received

✓ Submitted proposals do not reach an awardable score

Revisit advertising and/or reissue your RFP

Proceed with sole source procurement
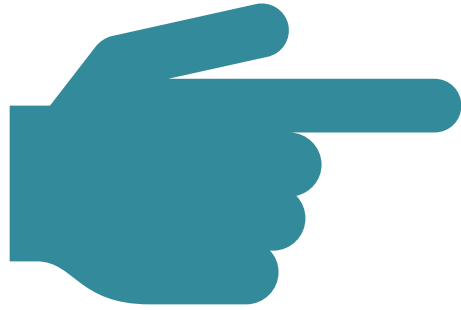
Application Guide
Part 1: Evaluation & Scoring

At this point, you can either pause the recording and go through these prompts, or you can wait until after the recording concludes.
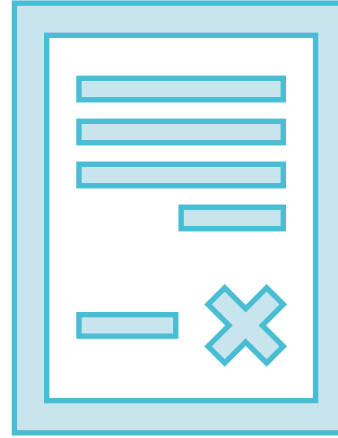
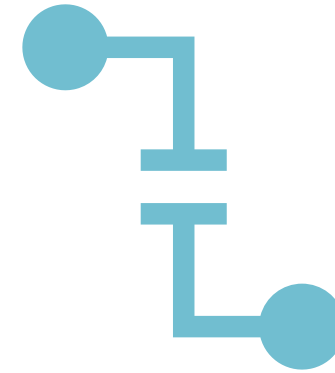# Evaluation Best Practices

"Do's" for Proposal Evaluation

Best Practices for Evaluating Proposals

Provide clear direction for evaluators	Obtain conflict of interest statements from evaluators	Keep procurement and operations separated

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Provide clear direction for evaluators

Conduct Internal Training for Evaluators

- Scoring Criteria and Rubric
- Forms
- Role of Evaluator
- Preview of Entire Process
- Services and Programs

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Conflict of Interest Statements

✓ Collect **conflict of interest statements** from all evaluators

✓ These should be signed and dated **before** evaluation takes place

See **N.J.A.C. 5:34-4.3 Opening and evaluating proposals and awarding competitive contracts** for more details and language

Keep Procurement & Operations Separated

Procurement (Review Panel)
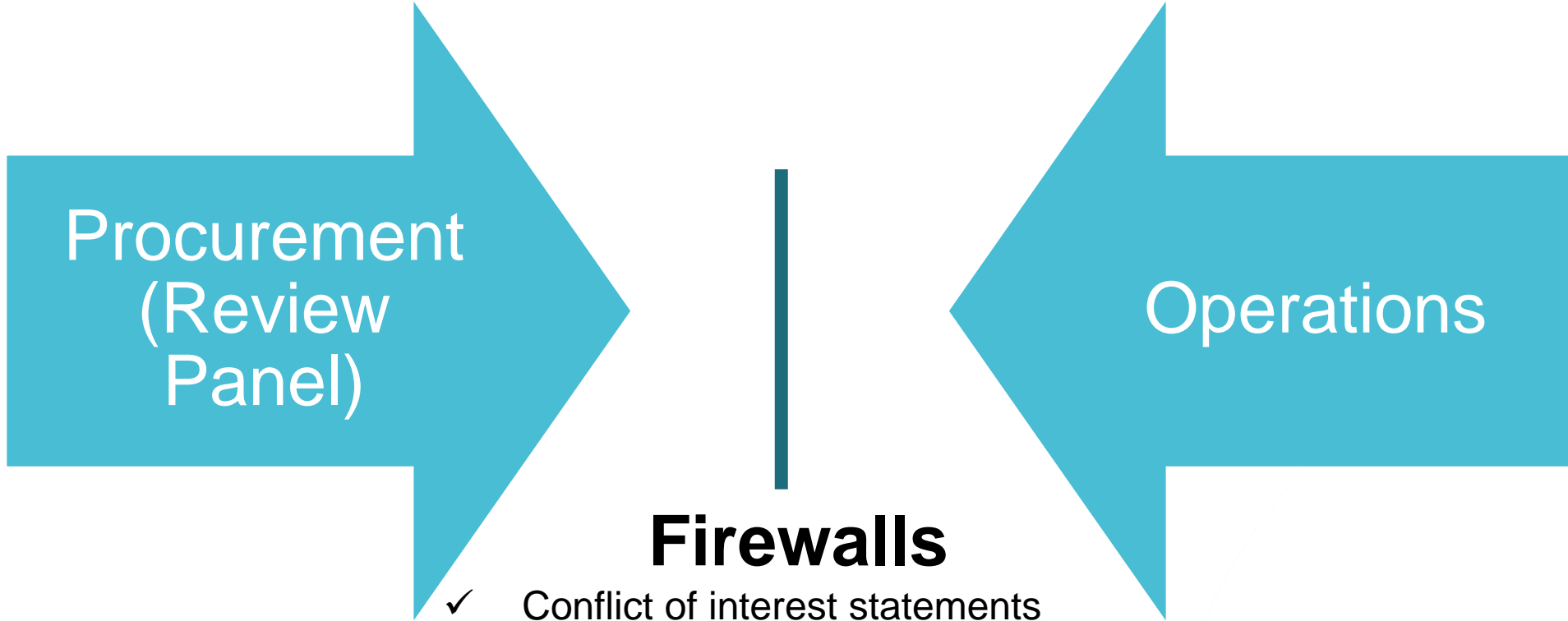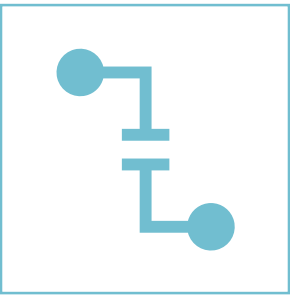
Operations

Firewalls

- ✓ Conflict of interest statements
- ✓ Evaluation based on proposals only
- ✓ Review panel is separated from operations and the public
- ✓ Promote transparency

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Application Guide

Part 2: Best Practices & Part 3: Rubric Creation Guide

Wrap Up

Key Takeaways

Evaluating and scoring the proposals involves the following activities: reviewing scoring procedures; establishing competitive range; conducting evaluation and scoring; deciding on a recommendation; and documenting results.

It is helpful to use and maintain a **rubric**, which incorporates local **evaluation criteria** and reflects the sections on the RFP. A **competitive range** may also be used. These scoring procedures are meant to sure that the evaluation and scoring is fair and objective.

Best practices include providing clear direction for evaluators, such as by conducting an internal training prior to evaluation; obtaining a conflict of interest statement from evaluators; and keeping procurement and operations separate by setting up firewalls.
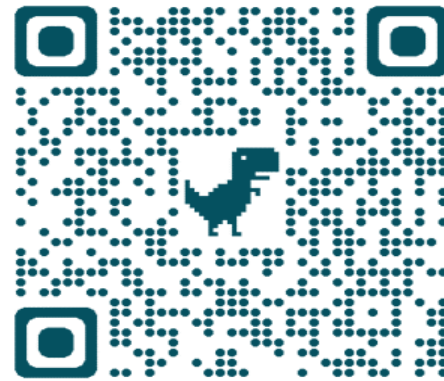
Application Guide & Technical Assistance

Application Guide

Go through the prompts for reflection in your application guide.

Technical Assistance

Address outstanding questions with a WIOA Subject Matter Expert by registering for Technical Assistance. Click the link below or scan the QR code.

Click Here to Sign Up for TA!

Preview of Next Module

The next module in the training series is about setting up agreements with the One Stop Operator, Career Services and Youth Services; as well as with Partners.

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References/Resources:

New Jersey Public Contracts Law

N.J.A.C. 5:34-4.2 Model evaluation criteria

N.J.A.C. 5:34-4.3 Opening and evaluating proposals and awarding competitive contracts

TEGL 15-16 "Competitive Selection of One Stop Operators"

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Thank You!