



**EVALUATOR HANDBOOK**

**FOR PROPOSALS**

## Appendix B to 3030 Purchasing Procedures

### Introduction

This document outlines the evaluation process and your role and responsibilities as an evaluator. If you have any questions after reading this document, please contact the supervisor of financial services.

### Goals

By issuing this RFP, Lakehead District School Board intends to select a supplier that, through the evaluation process based on weighted criteria, is found to be the best qualified to provide the goods or services to meet the requirements of Lakehead District School Board (LDSB).

At the conclusion of the evaluation process, the Board will enter into a contractual agreement with the successful supplier.

### Principles of Evaluation

The proposal evaluation process must adhere to the following principles:

#### Defensible

- A clear and logical process must be rigorously applied.

#### Transparent

- Evaluators should conduct assessments individually and independently from other team members and must clearly document their findings. The evaluations will be converted to numeric scores so that there are both a qualitative and a quantitative summary of each proposal. Each evaluator must clearly document all comments/findings to ensure the integrity of the procurement process, as this documentation may be used to debrief proponents. Additionally, evaluation sheets are subject to the Freedom of Information and Protection of Privacy Act (FIPPA) and in this regard can be requested through a Freedom of Information (FOI) request; and
- Final conclusions and award recommendations should be arrived at by team consensus.

#### Integrity

- The process should be objective:
  - evaluators must declare all existing and potential conflicts of interest; and
  - evaluators must sign a declaration attesting that all existing and potential conflicts of interest were disclosed.
- Confidentiality and security must be ensured:
  - evaluators are not to discuss the evaluation with each other prior to the evaluation team meeting; and
  - evaluators are not to discuss the evaluation with anyone outside the evaluation team.
- Evaluation process must be objective and fair:
  - only material submitted as part of the RFP submission and material obtained by formal clarification can be evaluated; and
  - no communication with bidders is allowed. Evaluators must sign a Non-Disclosure Agreement to this effect and must maintain that condition during and after the RFP process.
- All bids must be treated in the same manner and given equal consideration.

## Appendix B to 3030 Purchasing Procedures

### Documented

- the process must be documented to support selection of the successful bidder and to facilitate debriefing of unsuccessful bidders;
- all documentation must be clear and concise to facilitate future scrutiny such as audits and requests through an FOI application; and
- the process and results must be summarized, documented, and retained for future public scrutiny.

Note: Evaluation sheets are reviewed and kept in the RFP file in the purchasing department.

### Stages of Proposal Evaluation

- review bids for compliancy – each bidder's written submission must comply with all the mandatory requirements as set out in the RFP. Proposal submissions that do not comply, must be disqualified and not evaluated further;
- completion of individual evaluations on score sheets and supporting documentation;
- at the conclusion of the individual evaluation and scoring, a meeting will be convened to arrive at the consensus score for each proposal. A master summary sheet will contain the scoring and comments for all rated criteria for all submissions; and
- in the event of a tie score, tie-break procedures as defined in the RFP will prevail.

### Scoring Method

- weights for the evaluation criteria will be determined prior to the RFP being issued;
- evaluators will be given the rates and totals for each criteria evaluated; and
- each evaluator must maintain working notes of their evaluation as they are reviewing bids. The team will produce a summary showing the scoring allocated to each submission.

### Questions and Answers during the Evaluation Period

Evaluators may request clarification in writing, at any time during the evaluation period by forwarding questions to the supervisor of financial services or designate, who will ensure that the question is answered and made available to all of the team members.

### Responsibilities of Evaluators

- review the RFP and the addenda/attachments fully and thoroughly, with particular focus on the evaluation criteria;
- review proposals, assign points and write corresponding comments to support each individual score. Minimal comments are insufficient;
- evaluate proposal content and not style. Presentation styles will vary from expensive glossy to straightforward letter proposals. It is critical that the focus be on content only and in accordance with the pre-established evaluation criteria as set out in the RFP document;
- assess each proposal independently of the other submissions. Rate compliance with each criterion separately;
- review all information in the proposal. If the evaluators find information in the proposal, but not where it is technically supposed to be located, they must take the information into account;
- bidders' responses are to be scored solely on whether they answer the RFP the way they were instructed and whether they provide an adequate solution;
- evaluators must sign their final individual scoring sheets;
- after the individual portion of the evaluation has been completed, evaluators will meet to discuss their responses, clarify inconsistencies, and determine what their final group consensus will be;
- the supervisor of financial services or designate will prepare the Proposal Evaluation Summary Sheet; and
- after completion of the evaluation, all copies of bid submissions and all summary material will be collected and given to the supervisor of financial services or designate.