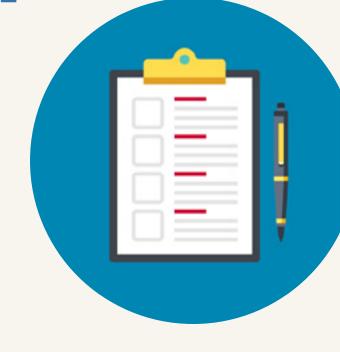# PROCUREMENT EXCELLENCE NETWORK

Partners for **Public Good**

→ HOW-TO GUIDE

Evaluation Scorecards

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IN THIS HOW-TO GUIDE YOU WILL:

- Learn what an evaluation scorecard is and how evaluators and RFP project managers can use these tools during the proposal evaluation process.

- Be equipped to develop an evaluation scorecard for use in your own procurement process, building on this publication's templates and drawing inspiration from best practices seen in other governments.

INTRODUCTION

What Are Evaluation Scorecards?

Proposal evaluation is a pivotal moment in any Request for Proposals (RFP). This decision not only directly impacts how a government is able to deliver services to residents, but it also means that some vendors—and not others— are awarded a government contract and allocated public dollars. For this reason, the decision must be fair and transparent. A government's procedures for proposal evaluation should be designed to help staff select the best proposal through a streamlined, results-oriented process.

During the RFP evaluation process, the evaluation committee is tasked with reviewing the responses of proposers with the goal of selecting the most qualified vendor who can deliver the project, program, or service at a reasonable price. In most governments, evaluation committee members individually score each proposal on a set of weighted criteria, though some do use ranked choice or consensus-based approaches.

An **evaluation scorecard** is a tool that helps RFP evaluators and project managers make selection decisions that are unbiased, consistent, and data-driven. An evaluation scorecard clearly defines the evaluation criteria and assigns each a weight out of 100%. It is usually in the form of a Word document or Excel spreadsheet. Often, the scorecard includes a rubric with guidelines for potential scores. The tool may also include guidance on which sections of proposals contain information most relevant to a specific evaluation criterion or examples of potential scores for each criterion to make it easier to normalize across evaluators.

What an Evaluation Scorecard Includes:

RFP scoring provides evaluators a way to grade responses and compare prospective vendors using a streamlined and consistent approach. A best-practice scorecard typically includes:

1. **Clear instructions with guidance for your evaluation team.** This might include guidance on how to read proposals and interpret budget documents and examples of content to look for in a top-scoring response.

2. **Defined criteria for evaluation with signposts to identify where relevant information can be found in proposals.** You can make it easier on your evaluators by tying each criterion to a specific set of questions you ask proposers to answer or to a specific section of your response template. You can read more about creating an RFP response workbook here.

Examples of Evaluation Scorecards

Long Beach, CA

Background

In 2021 Long Beach made the shift from consensus-based to weighted and scored evaluations. This change has allowed the city to evaluate RFPs with more structure and consistency and to be more transparent with vendors about how decisions are made. To make the shift, Long Beach has developed this evaluation scorecard template, which is customized to each RFP.

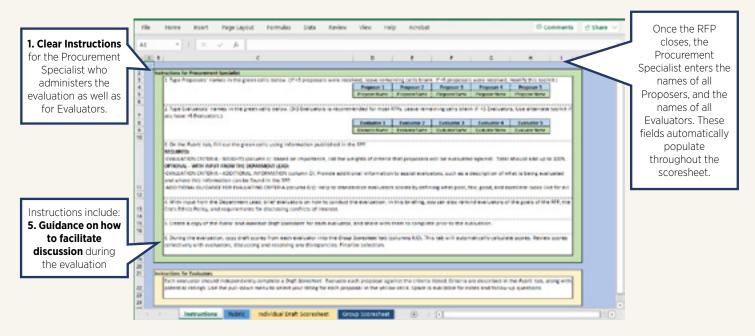The Long Beach evaluation scorecard is available for download and use here.

Approach

The Long Beach evaluation scorecard is used by Procurement Specialists and Evaluators. Once the RFP closes, the Procurement Specialist enters the names of all Proposers, and the names of all Evaluators. These fields automatically populate throughout the scoresheet.

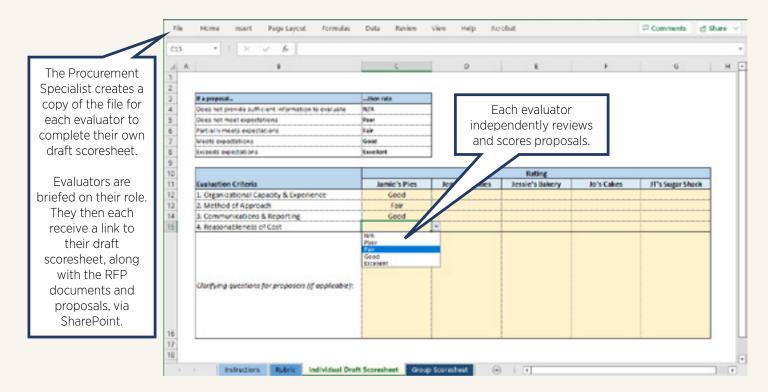The scorecard incorporates the following features:

1. **Clear instructions:** There are instructions for the Procurement Specialist who administers the evaluation as well as for evaluators.

2. **Defined criteria:** The scorecard provides space for the Procurement Specialist to enter the weight and description for evaluation criteria from the RFP. Most RFPs use these standard criteria with customized definitions and weights. However, criteria can be changed, added, or removed for highly specialized RFPs.

3. **Rubric:** The scorecard includes a built-in rubric for evaluators to use, with five ratings: N/A, Poor, Fair, Good, Excellent. Long Beach prefers these qualitative ratings to numbers, as they are more user-friendly. The scorecard also automatically translate qualitative scores into numbers to calculate numeric scores, and if the weights don't add up to 100%, an error message appears.

4. **Individual scoring:** The Procurement Specialist creates a copy of the file for each evaluator to complete their own draft scoresheet. Evaluators are briefed on their role. They then each receive a link to their draft scoresheet, along with the RFP documents and proposals, via SharePoint. Each evaluator independently reviews and scores proposals.

5. **Guidance for discussion:** The scorecard includes guidance on how to facilitate discussion during

the evaluation. It automatically averages the scores from each Evaluator and ranks them, thereby helping evaluators to identify variations in their scoring. In Long Beach, variations are discussed to elevate important differences in opinion based on differences in expertise or interpretation, and evaluators have an opportunity to update their scores based on discussion. Proposal(s) with the top score(s) are selected.

1. Clear Instructions for the Procurement Specialist who administers the evaluation as well as for Evaluators.

Instructions include: **5. Guidance on how to facilitate discussion** during the evaluation

Once the RFP closes, the Procurement Specialist enters the names of all Proposers, and the names of all Evaluators. These fields automatically populate throughout the scoresheet.

Above: The Instructions tab of Long Beach's evaluation scorecard.

Below: the Individual Draft Scoresheet tab.

The Procurement Specialist creates a copy of the file for each evaluator to complete their own draft scoresheet.

Evaluators are briefed on their role. They then each receive a link to their draft scoresheet, along with the RFP documents and proposals, via SharePoint.

Each evaluator independently reviews and scores proposals.

2. Defined Criteria: The Procurement Specialist also enters the weight and description for evaluation criteria from the RFP.

Most RFPs use these standard criteria with customized definitions and weights. However, criteria can be changed, added, or removed for highly specialized RFPs.

3. Rubric: Evaluators will use one of these five ratings: N/A, Poor, Fair, Good, Excellent. Long Beach preferred these qualitative ratings to numbers, as they were more user-friendly.

The scorecard will automatically translate these words into numbers to calculate numeric scores.

If weights don't add up to 100%, an error message appears.

Above: the Rubric tab of Long Beach's evaluation scorecard.

Examples of Evaluation Scorecards
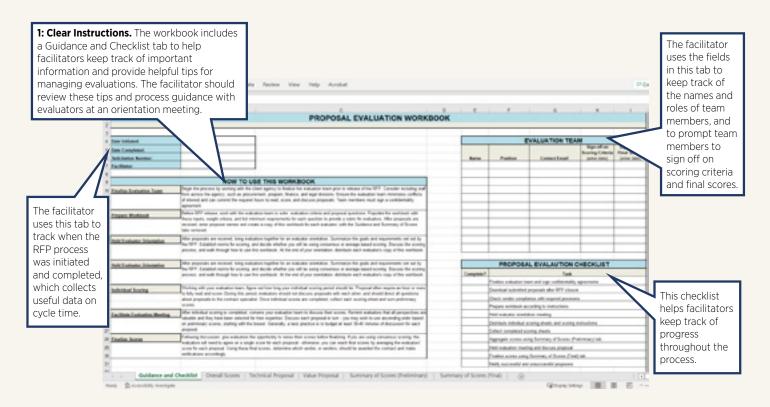
Connecticut

Background

This evaluation tool was developed in consultation with contract specialists at the Connecticut Department of Administrative Services and stakeholders in state contracting agencies. It was designed to standardize approaches to proposal scoring and evaluation committee facilitation and to promote more discussion of proposals among committee members.

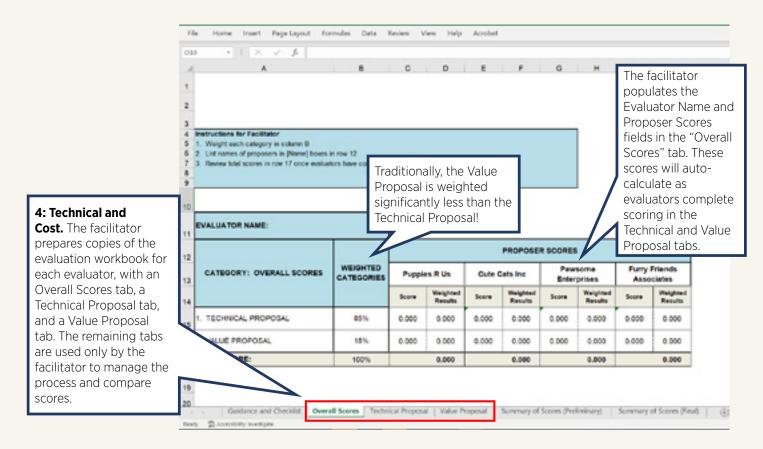The Connecticut evaluation scorecard is available for download and use [here](#).

Approach

The Connecticut evaluation scorecard includes the following features:

1. **Clear instructions**: The workbook includes a Guidance and Checklist tab to help facilitators keep track of important information, such as cycle timelines and the names and roles of team members. It also provide helpful tips for managing evaluations. The facilitator should review these tips and process guidance with evaluators at an orientation meeting.

2. **Defined criteria:** Within the Technical Proposal tab, scoring criteria are represented by subcategories, with corresponding proposal questions. Subcategories can be customized depending on the scoring criteria of the RFP. Each subcategory is weighted, and its weight is divided among the corresponding proposal questions. The process is repeated for the Value Proposal tab, which includes scoring on price, budget narrative, and any potential value-adds or discounts offered by proposers.

3. **Rubric:** The facilitator and evaluation committee discuss the requirements for a high-quality response to each question in advance and provide notes here for evaluators to consider during scoring. This promotes alignment of scores to RFP priorities.

4. **Technical and Cost Scoring:** The facilitator prepares copies of the evaluation workbook for each evaluator, with an Overall Scores tab, a Technical Proposal tab, and a Value Proposal tab. The Overall Scores tab auto-calculates as evaluators complete scoring in the Technical and Value Proposal tabs. Traditionally, Connecticut weights the Value Proposal significantly less than the Technical Proposal!

5. **Guidance for facilitating discussion:** In the Summary of Scores (Preliminary) tab, the facilitator pastes final scores from each evaluator for each proposer. These scores are added together. The Summary of Scores tab will automatically highlight the top and bottom scoring proposals for each evaluator, to facilitate discussion. Connecticut has found that often discussion time is best used to discuss the highest-scoring proposals, as these are the most likely to be selected. Once discussion is complete, evaluators are given an opportunity to revise their scores before they are entered into the Summary of Scores (Final) tab.

1: Clear Instructions. The workbook includes a Guidance and Checklist tab to help facilitators keep track of important information and provide helpful tips for managing evaluations. The facilitator should review these tips and process guidance with evaluators at an orientation meeting.

The facilitator uses the fields in this tab to keep track of the names and roles of team members, and to prompt team members to sign off on scoring criteria and final scores.

The facilitator uses this tab to track when the RFP process was initiated and completed, which collects useful data on cycle time.

This checklist helps facilitators keep track of progress throughout the process.

Above: the Guidance and Checklist tab of Connecticut's evaluation scorecard.

The facilitator populates the Evaluator Name and Proposer Scores fields in the "Overall Scores" tab. These scores will auto-calculate as evaluators complete scoring in the Technical and Value Proposal tabs.

Traditionally, the Value Proposal is weighted significantly less than the Technical Proposal!

4: Technical and Cost. The facilitator prepares copies of the evaluation workbook for each evaluator, with an Overall Scores tab, a Technical Proposal tab, and a Value Proposal tab. The remaining tabs are used only by the facilitator to manage the process and compare scores.

Above: the Overall Scores tab of Connecticut's evaluation scorecard.

Below: the Technical Proposal tab.

2: Defined Criteria. Within the Technical Proposal tab, scoring criteria are represented by subcategories, with corresponding proposal questions. Subcategories can be customized depending on the scoring criteria of the RFP.

Each subcategory is weighted, and its weight is divided among the corresponding proposal questions.

In the Technical Proposal tab, each evaluator uses their copy of the workbook to review proposer responses to the RFP questions and provides a 1-10 score, which is automatically weighted.

3: Rubric. The facilitator and evaluation committee discuss the requirements for a high-quality response to each question in advance and provide notes here for evaluators to consider during scoring. This promotes alignment of scores to RFP priorities.

2: Defined Criteria. The process is repeated for the Value Proposal tab, which includes scoring on price, budget narrative, and any potential value-adds or discounts offered by proposers.

Scores are again automatically weighted.

Above: the Value Proposal tab of Connecticut's evaluation scorecard.

Below: the Overall Score tab.

4: Technical and Cost. Returning to the Overall Scores tab, Technical and Value Proposal scores are now aggregated and weighted relative to each other.

Once total scores for each proposer are calculated, each evaluator submits their workbook to the facilitator, who will compile everyone's scores for discussion.

In the Summary of Scores (Preliminary) tab, the facilitator pastes final scores from each evaluator for each proposer. These scores are added together.

5: Facilitate Discussion. The Summary of Scores tab will automatically highlight the top and bottom scoring proposals for each evaluator, to facilitate discussion. Often, discussion time is best used to discuss the highest scoring proposals, as these are the most likely to be selected.

Once discussion is complete, evaluators are given an opportunity to revise their scores before they are entered into the Summary of Scores (Final) tab.

Above: the Summary of Scores (Preliminary) tab of Connecticut's evaluation scorecard.

Conclusion

The proposal evaluation stage is the most consequential point in the procurement process. All the work up to this point has led up to this moment of finding the right vendor to deliver services at the right price. By implementing a thoughtful approach to proposal evaluation, you can greatly improve the chances of fairly and transparently selecting a high-quality proposal while also make it easier on you and your evaluation team. But scorecards aren't the only piece of the evaluation puzzle. For more information on how to customize your approach to proposal while still balancing fairness, consistency, openness, and efficiency, check out our how-to guide Proposal Evaluation Tips & Tricks: How to Select the Best Vendor for the Job.

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