



# PROCUREMENT EXCELLENCE NETWORK

Partners for **Public Good**

→ HOW-TO GUIDE



## Proposal Evaluation Tips & Tricks: How to Select the Best Vendor for the Job

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### IN THIS HOW-TO GUIDE YOU WILL:

- Learn how to design a fair and effective approach to evaluating proposals to select the firm or organization that will best achieve the goals stated in your Request for Proposals (RFP).
- Gain new ideas to customize your evaluation, such as including external individuals or frontline staff as evaluators, incorporating interviews or demos, and debriefing unsuccessful proposers so they are better equipped to submit a winning proposal in the future.

## There is no one-size-fits-all formula for proposal evaluation

The decision *what* to buy and *who* to buy it from is a pivotal moment in any procurement. For public officials, deciding who to contract with for a big, long-term project can feel akin to buying your first new car, committing to a house, or choosing your life partner! Will you be able to work with this vendor day in and day out? Will your partnership endure over time? Will your partnership be fulfilling, allowing you to achieve your (er, rather, your program's) goals and ambitions? At the same time, the decision of who to contract with will not only directly impact how a government is able to deliver services to residents, it will also mean that some vendors—and not others—are awarded a government contract and allocated public resources. For this reason, the decision must also be open, fair, and transparent.

Proposal evaluation processes are intended to help government officials balance these two needs: finding the right vendor to work with, while making a fair and ethical decision. To accomplish this, purchasing offices often resort to one-size-fits all processes that bog down routine procurements with bureaucratic barriers while failing to aid decision-making for complex purchases.

Through dozens of projects with governments across the country, we've learned to simplify the approach to procurement evaluations and create a simple structure to guide this decision-making.

Rather than resorting to one-size-fits all approaches, this how-to guide will offer suggestions for approaching proposal evaluation as a **tool for systematic decision-making**. Your approach to proposal evaluation can be customized along standard dimensions at all stages of the evaluation, while still balancing fairness, consistency, openness, and efficiency.

## Customize your approach before the evaluation

It's important to start thinking about how you will evaluate proposals early, while you are drafting your RFP. Clearly outlining how proposals will be evaluated in your RFP document will help proposers know what to emphasize (or whether to apply at all), and to develop proposals to meet your needs. As you are planning for and drafting your RFP, there are five places to think about how your evaluation approach could be customized to be both effective and ethical:

STEP	KEY QUESTIONS
<b>1. Identify evaluators</b>	<ul style="list-style-type: none"> <li>Who has the right expertise, perspective, affiliations, and availability to evaluate proposals?</li> <li>How can you include the voices and perspectives of individuals who will work most closely with the selected vendor?</li> </ul>
<b>2. Define evaluation criteria based upon your RFP goals</b>	<ul style="list-style-type: none"> <li>Based upon your RFP goals, what criteria or characteristics will help you identify the best proposal(s)?</li> <li>How important are these criteria in relation to each other?</li> </ul>

STEP	KEY QUESTIONS
<b>3. Determine what information you need from proposers</b>	<ul style="list-style-type: none"> <li>Based upon your evaluation criteria, what information do you need from proposers to understand whether a proposal is a good fit? Will a template help you get this information in a standard way?</li> <li>Will it be more efficient for the government, or for proposers, to conduct the evaluation in stages?</li> </ul>
<b>4. Create tools for evaluators to make structured and consistent decisions</b>	<ul style="list-style-type: none"> <li>How will evaluators score proposals against evaluation criteria?</li> </ul>
<b>5. Prepare evaluators</b>	<ul style="list-style-type: none"> <li>What information do evaluators need to make objective evaluation decisions?</li> </ul>

## Step 1: Identify evaluators

KEY QUESTIONS
Who has the right expertise, perspective, affiliations, and availability to evaluate proposals?
How can you include the voices and perspectives of individuals who will work most closely with the selected vendor?

The perspectives of the individuals evaluating proposals will have significant bearing on which proposal is selected. In choosing individuals to evaluate proposals, consider:

- **Expertise:** Whenever possible, evaluators should be subject matter experts in the service area or project being procured or should have related or transferrable expertise.
- **Diversity of perspectives:** Subject matter expertise takes many forms. In addition to the government project manager who will be responsible for managing the contract day-to-day, and a procurement official who will oversee the evaluation, individuals with the following experiences may have valuable perspectives to bring as evaluators. If you do include outside evaluators, be conscientious about their time and consider whether compensation would be appropriate.
  - *Frontline staff*, who understand how services will be delivered in the field and who will ultimately be working with the vendor day-to-day
  - *Residents*, who will be engaging with services and have a perspective on how they need to be delivered
  - *Staff from partner agencies or other local governments*, who have prior experience related to a new service, and can bring increased objectivity

- **Impartiality:** Evaluators should have no perceived or apparent conflicts that would influence their evaluation. This means they should generally not have a bias that might influence their rating coming from an existing relationship or affiliation with one or more of the proposers, no vested interest in having one entity win the contract, and no other conflict of interest. Each government will have their own rules or process for identifying potential conflicts; it is important to communicate these rules to potential evaluators early to avoid having to replace an evaluator at the last minute. Evaluators should also each make independent decisions. For this reason, you may not want staff with reporting relationships (i.e., directors and support staff) on an evaluation committee together.
- **Availability:** To maintain consistency, the same group of evaluators should be prepared to participate throughout the evaluation. For evaluations that are expected to be longer or more complex (for instance, evaluations with interviews and demos), select evaluators who can confirm they will be available throughout.
- **The right number of evaluators:** Routine procurements usually have 3-5 evaluators, and many governments like to have an odd number of evaluators in the event there is a need to break a tie. Large and complex procurements, where a greater diversity of perspectives should weigh in on the decision or where a large volume of responses is expected, may require more evaluators. However, keep in mind that coordinating schedules can become more difficult the more evaluators you have.

## Step 2: Define evaluation criteria, based upon your RFP goals

### KEY QUESTIONS

Based upon your RFP goals, what criteria or characteristics will help you identify the best proposal(s)?

How important are these criteria in relation to each other?

In an RFP, you can 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. It should:

- **Connect to the specific goals, metrics, and scope of work,** as a logical continuation of prior sections in the RFP.
- **Balance multiple priorities** encompassing the vendor's capacity and experience, the specifics of the vendor's proposal, and the cost of the proposal. Consider your needs holistically. For instance, if vendor experience is important, but there is a need to provide services across multiple geographies, you may select a less experienced vendor to serve a geography that is high need but not as competitive.
- **Be fair to all proposers,** free of bias, consistent, and not overly restrictive.

- **Clearly outline the evaluation structure** to set expectations for vendors.
- **Be detailed** enough that proposers know what a successful response looks like.
- **Clearly map to the information you will ask proposers** to submit or answer to the relevant evaluation criteria.

For many RFPs there are three general factors that should be considered in the evaluation: (1) capacity and experience of the proposer; (2) proposed approach or solution; and (3) price. You'll want to define what these criteria encompass, and whether there are any other criteria that should be considered within the context of your specific RFP. An example of the types of factors you might consider is:

EXAMPLE EVALUATION CRITERIA		WEIGHT
Capacity and experience of the proposer	<p>Proposer has provided evidence of <b>experience managing projects</b> of a similar type and complexity</p> <p>Proposer has demonstrated <b>relevant technical or data analysis expertise</b></p> <p>Proposer is likely to be effective at <b>coordinating and collaborating with key stakeholders</b></p> <p><b>References and/or past experience with the government or other similar government clients</b> provide positive feedback of the proposer's ability to deliver, and of their experience working with the proposer</p>	XX%
Proposed approach or solution	<p>Proposal is <b>aligned with RFP goals and scope of work and likely to successfully achieve them</b></p> <p><b>Proposed timeline</b> is realistic</p> <p><b>Staffing plan</b> is likely to deliver excellent service</p> <p><b>Project management approach</b> aligns with program needs and organizational culture</p> <p>Proposal for <b>data collection, analysis, and reporting</b> meets administrative requirements and performance tracking needs of the program</p>	XX%
Price	<p><b>Reasonableness</b> of cost</p> <p><b>Allocation</b> of resources within the proposed budget</p> <p><b>Ability to supplement</b> resources with in kind or outside support</p>	XX%
		<b>Total Possible Score = 100%</b>

In addition to defining evaluation criteria, you'll also want to be clear about their relative importance. Assigning weights to each criterion, as illustrated in the example above, is a great way to do this. It helps vendors understand what to emphasize within their proposal and potentially whether to respond at all. It will also help evaluators balance multiple priorities to assess proposals during the evaluation. When assigning weights:

- **All weighted criteria should together add up to 100%**
- **Avoid assigning weights smaller than 5%,** as this is likely too granular to meaningfully change a score.
- **Reflect on how you want to compare price against other factors.** Weighting price, as illustrated in the example above, is a straightforward and common approach. However, it's not the only option. For example, in RFPs where value for money is a priority, proposal content may be evaluated first, and then compared against price by calculating dollars per point; or, proposal content may be evaluated, the top technically acceptable proposals shortlisted, and award made to the lowest priced proposal among them.
- **Identify any mandatory eligibility requirements separately.** While you should avoid creating unnecessary eligibility requirements that could exclude viable proposals, some RFPs do have mandatory eligibility criteria (often because of federal funding or local labor law). These requirements should be clearly outlined up front in the RFP, so proposers know whether or not to apply.

### Step 3: Determine what information you need from proposers

#### KEY QUESTIONS

Based upon your evaluation criteria, what information do you need from proposers to understand whether a proposal is a good fit?

How might you construct an RFP that minimizes wasted effort for both proposers and reviewers?

Once you have defined your evaluation criteria, reflect on the information that you need from proposers. Each evaluation criteria should map directly to information you will ask proposers to submit or answer as part of the evaluation. This could include:

- **Written narrative proposal:** Open-ended narrative proposals are a traditional response format for RFPs. If you use this approach, encourage proposers to organize their responses according to your RFP's evaluation criteria and goals so that they are easier to evaluate.
- **Written answers to targeted questions:** Are there specific components you want to evaluate across all proposals? If so, rather than asking for an open-ended proposal, ask proposers to respond to a list of specific questions to give you exactly the information you need. Furthermore, it can be a great way to level the playing field for proposers who have less experience with government contracting and might struggle to develop an open-ended proposal. Asking proposers to answer these questions through a standard template is a simple way to help you evaluate proposal substance more efficiently, and without being biased by aesthetics.

- **Samples:** Do you want to see and feel the vendor's product, and understand how it would fit into your operations or whether it meets your needs? Ask them to send samples that you can engage with directly.
- **Interviews, demos, or site visits:** Do you want to understand what it would be like to work with a vendor, or to engage with their technology? Plan for interviews, demos, or a site visit to the vendor's facilities as part of your evaluation. If collaboration between vendors will be required, you might include a practical exercise in which the different parties have to collaborate on solving a problem so you can observe how well they work together.
- **References:** Is it important to understand past client experiences? If so, ask those clients directly as part of a reference check.

## → Two Efficiency Tips

**Don't ask proposers to submit unnecessary information:** It takes time for a proposer to respond to an RFP and for evaluators to read these proposals. As you review the information that you plan to request, consider whether it is absolutely needed to assess the corresponding evaluation criterion. Don't ask for information that won't help you decide or isn't a mandatory compliance requirement.

**Consider shortlisting and conducting your evaluation across multiple stages:** Shortlisting proposals and conducting a multi-stage evaluation may not sound more efficient but it can allow you to focus your efforts on securing the best possible solution from the most promising proposers. If you plan to shortlist, make sure you have clear criteria to select finalists, and be thoughtful about what information you ask of proposers at each stage.

## Step 4: Create tools for evaluators to make structured and consistent decisions

### KEY QUESTIONS

How will evaluators score proposals against evaluation criteria?

An evaluation rubric is the document or tool that evaluators fill out with their assessment of each proposal. Rubrics are an important tool to help standardize each evaluator's review. They can also help to calculate and consolidate scores across evaluators. Rubrics do not need to be published in the RFP document; however, you'll want to have your rubric ready in advance of the evaluation process with enough time so evaluators can learn how to use it. Your evaluation rubric should include:

- **The RFP evaluation criteria:** Including descriptions, weights, and indication of what part of the proposal will inform the scoring (from steps 3 and 4)

- **A scale for scoring proposals against evaluation criteria:** Scores could be numeric (i.e., 1, 2, 3 or 1, 2, 3, 4, 5) or qualitative (i.e., low, medium, high; poor, fair, good, excellent; not advantageous, advantageous, highly advantageous). Potential scores should be defined so that all evaluators apply them consistently. For instance, all evaluators should have a shared understanding of what it means for *capacity and experience of the proposer to be poor, fair, good, or excellent*.
- **A plan for scoring price:** Price is different from many other evaluation criteria because it can be evaluated quantitatively. For this reason, many governments choose to use a formula to evaluate price, rather than a subjective score. The “Ratio Method” is one such formula, illustrated in the call-out box on the next page.
- **A place to note gaps and questions:** As evaluators review proposals, they may think of questions that will help better understand each proposal. Provide space for evaluators to note these questions, which can be addressed either through a request for clarification sent in writing by the procurement professional, or during interviews or demos.
- **Functionality to compile individual scores and calculate a final decision:** Designing your rubric in a software that will automatically calculate and consolidate scores will help you run an efficient evaluation. Governments use many different types of software to create evaluation rubrics, from Excel to Google Sheets, to web forms, to an eProcurement software.

## → The “Ratio Method” for Calculating Price

The lowest-price proposal gets maximum points. All other proposals get points in inverse proportion to the lowest-price proposal. For example, where price is 30% of total score:

PROPOSAL	COST	COST SCORE	CALCULATION
Proposal A	\$25,000	30%	(\$25,000/Proposal Cost) x 30%
Proposal B	\$30,000	25%	
Proposal C	\$50,000	15%	



## Step 5: Prepare evaluators

### KEY QUESTIONS

What information do evaluators need to make good evaluation decisions?

To equip evaluators to make good evaluation decisions, plan to brief them in advance to help them understand:

- The RFP goals, objectives, and scope of work
- The evaluation approach and criteria
- The role of evaluators

**An efficiency tip:** Briefing evaluators can take time, particularly if your evaluators are less familiar with proposal evaluation processes. To keep your evaluation moving, try the following:

- **Ask evaluators to provide feedback on the RFP draft**, including the scope of work and evaluation criteria. This will help them have a nuanced understanding of both the government's requirements, as well as the evaluation approach. It will also give you the benefit of their expertise to help design the RFP.
- **Book dates well in advance** to brief evaluators and conduct the evaluation so that scheduling does not become a bottleneck.
- **Take care of administrative requirements upfront**, like having evaluators sign a conflict-of-interest declaration.

### During the evaluation, balance fairness, consistency, and effective decision-making

Your government's procurement policies and procedures will govern how you conduct the evaluation, but they will likely allow for some discretion. Evaluating proposals effectively, while being fair and consistent is a balancing act. Here are some core principles and considerations to help you strike the right balance.

During evaluation stage 1, Review for Responsiveness, many governments have a procurement professional screen proposals to check that they are complete and meet all mandatory eligibility criteria.

#### Treat proposals fairly and consistently:

- The responsiveness review should focus on checking that proposals have the essential documents and information to be evaluated (i.e., narrative and price proposals are submitted). No proposer should be given more time to prepare missing content.

**...without being unnecessarily restrictive:**

- The responsiveness review should not impose unnecessary barriers. For instance, if a proposal is missing non-substantive signatures or supporting documentation, you might request that the proposer submit this information rather than ruling out viable proposals.

During evaluation stage 2, Evaluate Proposals, evaluators independently evaluate proposals using the criteria and rubric developed prior to the evaluation.

**Treat proposals fairly and consistently:**

- All evaluators should independently evaluate each proposal using the evaluation rubric. (If proposals are large and work needs to be split, consider having evaluators review the same section within each proposal.)
- Evaluators should be well briefed on the goals, vision, and context of the RFP so that they're focusing on the key points that matter for the RFP.
- To evaluate proposal content objectively, consider having evaluators review price after other criteria, or having a procurement professional evaluate price independently.
- All communication with proposers should be with an impartial procurement professional (who is not a decision-maker in the evaluation).

**... but balancing with the information you need to evaluate proposals well:**

- If an aspect of a proposal is unclear, the procurement professional may ask proposers to clarify in writing. This process should be used only to clarify, but not to correct, supplement, or modify a proposal.

During evaluation stage 3, Consolidate Scores, evaluators come together to consolidate, discuss, and finalize scores to identify the top proposal(s).

**Keep the role of evaluators impartial and independent, but make selection decisions only after considering proposals thoroughly:**

- To capture the perspectives of all evaluators equally, consider Cumulative Scoring, in which the independent scores of all evaluators are averaged, rather than Consensus Scoring where the group collectively decides on the best proposal.
- After scores are consolidated, plan for discussion.
  - To mitigate power imbalances, facilitate this discussion so that the most junior evaluators share their perspectives first and the most senior evaluators share last.
  - Focus the discussion on areas where scores greatly diverge across evaluators. One evaluator may have picked up on information that others did not, which might help each make better decisions.
  - Also be on the lookout for prices that are unusually low. This may suggest that the proposer didn't understand the scope, or that they plan to issue many change orders post-award.

- Based upon this discussion, evaluators should have the opportunity to update their individual scores to reflect their best assessment.

During evaluation stage 4, Conduct Interviews, Demos, or Reference Checks for Shortlisted Candidates, evaluators undertake additional evaluation stages to assess the top proposals.

**Think outside the box about the information you want to evaluate, but give proposers equal opportunity to impress you:**

- Shortlisting proposers for further stages of evaluation can be a great way to choose between the top tier of proposals. If you shortlist, use consistent criteria.
- Give each shortlisted proposer equal opportunity to impress you! In advance of interviews, demos, or references checks, prepare a standard set of questions, along with a rubric to score responses. This may also include proposal-specific questions to address gaps or concerns evaluators may have identified.
- It can be helpful to send interview questions to proposers a day or two in advance. Every proposer should have equal opportunity to prepare so if you take this route make the process and timeline known in advance.
- For interviews and demos, be prescriptive about who participates. For instance, it will likely be more valuable to interview the actual project manager you would be working with than the sales manager.
- Interviews and demos should be evaluated consistently using the criteria and rubric developed prior to the evaluation. In some instances, evaluators update scores in the initial rubric based upon the evaluation. In others, there may be specific weighted criteria that are evaluated during the interviews and demos.
- After these additional stages are completed, the evaluation committee should reconvene to consolidate, update, and finalize scores.

During evaluation stage 5, Initiate Pre-Award Negotiation, a procurement professional, or selected negotiators, work with top proposers to improve their price or proposed terms to better meet the RFP's needs.

**Treat proposals fairly and consistently, while pushing for the best possible proposal:**

- Negotiating with finalists can be an important step to optimally meeting the needs of the RFP. If you want to be able to negotiate, provide for this in your RFP document.
- Use a systematic approach to identify the finalists that will have an opportunity to participate in negotiation:
  - *Consecutive negotiations (Rank and Run)*: Rank shortlisted proposers. Negotiate price or proposal terms with the top-ranked proposer. If unsuccessful, negotiate with the second-ranked proposer, etc.
  - *Concurrent negotiations (Best and Final Offer)*: Give all shortlisted proposers a final opportunity to improve their prices or modify proposal terms simultaneously. Base final selection on these offers.

During evaluation stage 6, Offer Post-Award Debriefs, a procurement professional meets with unsuccessful proposers to offer guidance for future RFPs.

**Treat proposers fairly and consistently, while setting them up for success in the future:**

- Debriefs can give unsuccessful proposers valuable information to submit a better proposal in the future. It can also help unsuccessful proposers feel more positive about participating in future RFPs. This step is a critical strategy for increasing contracts with small, local, and minority-owned firms over time.
- The opportunity to debrief should be clearly advertised. It should be available to all unsuccessful proposers after the award has been announced, after protest periods have ended, and within a specified amount of time as stated in the RFP.
- Debriefs should be conducted by a procurement professional.
- During the debrief:
  - The intent of the debrief is to provide the proposer with constructive feedback on their own proposal. Discuss only details, strengths, and weaknesses of that proposer's proposal. Do not share information about other proposers.
  - Help the proposer feel encouraged to propose again.
  - Ask for feedback on the RFP and solicitation process to make future improvements.
- Log a written record outlining the details of the debrief discussion in the RFP file.

## Are you ready to customize the evaluation for your next RFP?

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This how-to guide was designed to help you customize a fair and effective approach to evaluating proposals for your next RFP, incorporating new ideas like including external evaluators, using interviews or demos, and debriefing unsuccessful proposers so they are better equipped to meet your needs in the future. For your next RFP, we hope you approach proposal evaluation as a tool for decision-making, and that proposal evaluation starts to feel more intuitive (and less like a mountain of bureaucratic requirements!).

The tips and practices included in this how-to guide stem from our experiences working with governments across the country. As the learning never ends, we welcome you to share any additional evaluation practices you would recommend to others at the [Procurement Excellence Network](#)!

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