

Technical Evaluation Panel Members' Responsibilities

I. General

Panel members **should not** discuss the proposals or their evaluations of the proposals with the other panel members until all of the initial evaluations/scorings have been completed. However, as a matter of arriving at a consensus evaluation, after completion of their initial evaluations/scorings, panel members are required to discuss their individual evaluations with other panel members. There must be no disclosure of any information during the course of the evaluation to **anyone other than those participating** in the proposal evaluation/scoring proceedings.

Panel members will have a copy of the RFP and their own copy of each proposal. Proposals contain proprietary information which **must** be secured at all times when proposals are not been evaluated/scored. Panel members **must** keep the proposals secured in a locked cabinet or safe. Panel members, who receive any inquiries from offerors, should direct the offeror to the contract officer.

Each panel member is to independently evaluate/score the proposals using only the evaluation factors that were published in the RFP. There **cannot** be any deviations from the published evaluation factors. You must take explicit notes, documenting strengths and weaknesses, ensuring that this documentation supports the assigned score and acceptability determination. In addition, because each panel member has their own copy of the proposal, they can highlight and make margin notes in their working copy.

It is inappropriate to compare/evaluate proposals against each other. Each proposal must be evaluated on its own merits against only the factors requested in the RFP.

Ensure that you are evaluating the information that relates to the appropriate evaluation factors.

Panel members will document strengths and weaknesses on the evaluation/scoring sheets provided. Use the back of the sheets if additional space is required. Panel members must

complete the evaluation/scoring sheets for each proposals' xx evaluation factors. Also, a summary scoring sheet must be completed for each proposal.

II. Panel Members Evaluations/Scorings of Proposals

Scoring for each factor must be based on the information presented in the proposal. You are asked to objectively rate each factor as (place your agency's rating procedures here i.e., 1-100; 1-10; 1-20, or whatever your agency uses). Please identify the strengths and weaknesses of each proposal based on the factors in the RFP. Strengths and weaknesses should be stated with a factual basis or explanation. Simple, conclusory statements are not adequate. Record any questions you may have concerning the proposal that you want to discuss when the Technical Evaluation Panel meets to determine a consensus score. After completing the technical evaluation/scoring of each of the proposals, each panel member is requested to review their evaluation/scoring to ensure that they have objectively rated and numerically scored the proposal only with respect to the factors in the RFP.

III. Technical Evaluation Panel Consensus Ratings and Scores

The Technical Evaluation Panel will convene and discuss their individual findings and arrive at a consensus score and consensus rating for each proposal utilizing the following procedures:

- Each proposal shall be discussed separately. The panel members shall decide the order in which proposals shall be discussed. In order to begin discussions, the individual rating and scoring for each proposal by factor shall be provided by each team member. This information should be kept readily available during discussions.
- Once overall ratings and scores for a proposal's factors have been provided, each panel member should review the information in order to detect where there are significant differences. These significant differences must be discussed and resolved. In addition, any questions that panel members may have had for a factor should be discussed and resolved by the panel. Panel members should document the disposition of all questions.

- Subjective differences (differences of opinion) even after discussions may result in an agreement that the parties disagree. If there remains disagreement, the individual may submit a minority evaluation report or comment to the report. However, physical differences as to whether some information has been provided or is missing can and must be resolved.
- During discussions, panel members may want to change their independently assigned scores based upon discussions with the other members. Any change of the initial score must be documented on the panel members scoring sheet by lining through the original score, writing the revised score with an explanation as to why it was changed, and finally, initialing and dating the change. The explanation for changing a score must be direct and explicit. Simply stating that the score was changed "based upon group discussions" is not acceptable. Your technical evaluations must provide a clear audit trail regarding the documentation of the facts. These changes must be handwritten and legible.
- The consensus score shall not be arrived in a mechanical or formulaic approach. Rather, it should reflect what the panel agrees to be a reasonable and appropriate score. A consensus score must be assigned for each proposal.

IV. Chairperson Responsibilities

The chairperson is responsible for providing a summary evaluation report which must include:

- A summary narrative statement of the strengths and weaknesses of each proposal derived from the panel members' evaluations and discussions (panel members will assist the chairperson in compiling the summaries);
- Documentation of reference checks;
- Summaries and/or graphs of each panel members' evaluation/score and the consensus by factor for each offeror's proposal;
- The panel members' evaluations; and
- Signatures or initials by all panel members indicating concurrence with the contents of the consensus report.