



**John S. Richard**  
Director

**Brad Henry**  
Governor

STATE OF OKLAHOMA  
DEPARTMENT OF CENTRAL SERVICES

**Central Purchasing Division**  
**PROCUREMENT INFORMATION MEMORANDUM Number 10-04**

DATE: September 27, 2010

TO: All CPOs

FROM: Department of Central Services Central Purchasing Division

SUBJECT: Procedure Guidance for the Evaluation of Solicitations issued as a Request for Proposal.

CONTACT: Lee\_Johnson@dcs.state.ok.us

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Reference: Title 74 §85.2, §85.7.C, and §85.39c; OAC 580:15-4-11, 15-4-5(e), and 15-4-10

Prior to the issuance of a Request for Proposal (RFP), the agency's Certified Procurement Officer and/or other agency staff must develop evaluation criteria and a scoring tool that will be used for evaluation purposes. The evaluation criteria shall be included in Section D of the DCS standard solicitation package and mirror the criteria within the scoring tool. For RFP's processed by Central Purchasing, the scoring tool must be submitted with the agency requisition along with specifications. Agencies must have internal procedures (consistent with this PIM) developed, approved, and implemented prior to issuing a competitive RFP solicitation.

The evaluation criteria in the RFP shall clearly communicate what the state deems important and be listed from most to least important. It is not necessary to inform bidders of the weights for each of the criteria with the RFP. However, it is critical that the scoring tool reflects the weights assigned to each criteria and that scoring is as objective as possible. It is expected that the scoring tool will provide individual evaluators a common understanding of what the scores mean and how scores are to be determined so they can be objectively assigned. Having a standard approach eliminates personal bias and takes some of the arbitrariness out of scoring. A good working definition of when to assign a 5 versus an 8, for example, will ensure that evaluators can agree on a score rather than averaging the different scores.

It is also critical to be consistent in your evaluation process. You must evaluate exactly what you said you would evaluate in the RFP and do it consistently for all responses. For example, if you check references by phone for one supplier, you must check references by phone for all other suppliers.

When a team is involved in an evaluation, if the individual scores have wide variations, the variance should be explained, documented, and placed in the acquisition file. This documentation is necessary to

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defend protest actions and is difficult to obtain months after the original team is disbanded. Evaluation team consensus scoring is acceptable provided that no undue influence is exercised over any member of the team. Remember, the purpose of the scoring tool is to ensure objective, unbiased, transparent, and fair processes are utilized. The evaluation tool is not a comparison of different supplier proposals; it must be designed to compare each bidders proposal to the requirements stated in the RFP.

In general, it is recommended that cost comprise at least 30% of the total points.

A well written scoring tool is critically important in the acquisition process and must be documented in the acquisition file. Its function is to clearly and concisely document and demonstrate the rationale and business judgment used by the evaluator or evaluation team in deciding which supplier offered the best value to the state and should be awarded the contract.

There are times when the scoring tool and evaluation criteria need to be revised prior to the opening or due date of the solicitation. If conditions change or new knowledge is encountered during the time period that the RFP is open for responses that cause changes to what is being evaluated, utilize RFP amendments to communicate the changes fairly to all suppliers and then give the appropriate time for the supplier community to react to the amendment. Even if an agency elects to publish the point rating in the RFP, it can be changed prior to the due date as long as it is communicated to the bidders by a solicitation amendment. The scoring tool would need appropriate modification to reflect the changes made in the RFP. An extension of the due date may be required to allow the suppliers additional time to modify their responses based on any amendment to the solicitation.

There is no “cookie cutter” evaluation approach applicable to all acquisitions. Evaluation documents should be adapted and tailored to the individual circumstance of each solicitation.

A quality scoring tool possesses seven common attributes:

- 1) The scoring tool is consistent with the evaluation criteria stated in the solicitation and directly traceable to and supported by the evaluation results of the evaluator or team of evaluators.
- (2) The scoring tool is an independent, stand alone document.
- (3) The scoring tool clearly and concisely guides the various comparative assessments made by an individual or team in reaching the final best value determination.
- (4) Each criteria should be “number-indexed” or cross-referenced to a relevant section in the solicitation, so it assures the team no criteria is inappropriately included or excluded from consideration.
- (5) The scoring tool, including methodology, is completed and secured prior to the issuance of the solicitation.
- (6) The scoring tool is never altered after opening of proposals.
- (7) Contains applicable terms to describe what is needed to make a determination and recommendation for award.

For additional information regarding this PIM contact Lee Johnson [Lee\\_Johnson@dcs.state.ok.us](mailto:Lee_Johnson@dcs.state.ok.us).

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Real Estate Management • Will Rogers Office Building (2401 N. Lincoln Boulevard), Suite 112 • Oklahoma City, OK 73105  
Telephone: 405/522-0517 • Fax: 405/522-2230 • [www.dcs.ok.gov](http://www.dcs.ok.gov)