***Modify the following guide as per your Division's requirements...***

## Objectives of Using an RFP Scoring Guide (Template)

* Promotes a consistent and unbiased scoring process for proposals
* Reduces or eliminate individual scoring bias
* Aims to achieve a consensus score for each proposal

## Suggested Process

**Organize Your RFP Evaluation Process**

* Identify a team lead - this person will facilitate/organize the process.
* Identify your proposal evaluation team e.g., ED and Board Member (s).
* Organize the evaluation meeting date and venue.
* Provide the evaluation package to the team - proposals and process.

**Prepare for the Evaluation Meeting**

* Ask each team member to read the proposal once or twice before the evaluation meeting noting strengths and weaknesses.
* Advise team members to **NOT** discuss the proposals prior to the evaluation meeting.
* Print all meeting materials including copies of the proposals - team lead responsibility.

**Hold the Evaluation Meeting**

* Identify who will be designated to take notes at the start of a session.
* Identify the primary objective is to achieve consensus on the scoring of each proposal.
* Identify the expected outcome of the meeting is to determine the successful proponent.
* Follow the process below or modify this template to meet the RFP scope.

***Helpful Tips***

* Use a separate package for each proposal submission to promote objectivity.

## Evaluation Criteria and Scoring - Note: the stages are based on the RFP example.

**Stage 1 - Review the proposal against the required (mandatory) criteria. Note: the division determines what is mandatory in the planning stage of the RFP process.**

| **Required (Mandatory) Criteria** | **Check -✓** |
| --- | --- |
| 1. The proposal must be received by the specified closing date and time. |  |
| 1. One (1) electronic copy of the proposal must be submitted in either MS Word or PDF format to the email address located on the cover page. |  |
| 1. An unaltered, completed and signed RFP cover page must be submitted with the proposal. |  |
| 1. The response must be no more than **5 pages** in total excluding resumes/references. |  |
| 1. The proposal must include a minimum of three relevant references for the company/person. |  |
| 1. The proposal must not exceed the maximum RFP budget i.e., Canadian Funds. |  |

***Note: only proceed to stage 2 if the mandatory criteria is met.***

***Proposal Submitter's Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_***

**Stage 2 - Review the Desirable Criteria and Score Each Element**

## Note there are different scoring schemes available (for a simpler approach see Appendix I).

|  |  |  |  |
| --- | --- | --- | --- |
| **Scoring Table** | | | |
| **Points Awarded** | **Points Awarded** | **Quality** | **Criteria** |
| 5/5 | 10/10 | Exceptional | Exceptional; far exceeds expectations with no added risk. |
| 4/5 | 8/10 | Very Good | Exceeds expectations; risk deemed acceptable. |
| 3/5 | 6/10 | Acceptable | Meets expectations and all minimum requirements. |
| 2/5 | 4/10 | Below | Does not meet expectations or minimum requirements. |
| 1/5 | 2/10 | Well Below Requirements | Fails to meet minimum requirements; proposes a solution that is not acceptable. |
| 0 | 0 | Unacceptable | Proposed solution deemed unacceptable in every aspect. |

**Begin Rating Process for the Desirable Criteria**

|  |  |  |
| --- | --- | --- |
| **RFP Section 2.2** | **Desirable Criteria** | |
| **Requirement** | * 2.2.1. Proposed approach | |
| **Prompts** | **In considering the criteria below, some suggested prompts are:**   * Is the overall approach tailored to the needs of the Division, and is it well-supported?   + Is the reasoning behind the approach sound? * Is the timeline realistic? * Is the methodology clear? * Are the proposed tools appropriate for the goal of the evaluation and the available resources? | |
| **Criteria** | **Maximum Score 30 points** | **Awarded Score** |
| Overall Approach | 10 |  |
| Proposed tools e.g., survey, logic model | 5 |  |
| Methodology | 5 |  |
| Timeline | 5 |  |
| Reporting plan | 5 |  |
| **Total** |  |  |

|  |  |  |
| --- | --- | --- |
| **RFP Section 2.2** | **Desirable Criteria** | |
| **Requirement** | * 2.2.2 Expertise and skills of members of the project team and the company/consultant. | |
| **Prompts** | **In considering the criteria below, some suggested prompts are:**   * Does the consultant/firm clearly describe their experience? * Does their experience include examples of relevant evaluation methods, software and tools? * Does their experience include managing the research, fiscal and administrative functions of an evaluation project? * Do they provide enough information to assess their experience e.g., resume, samples they may provide etc? * Are the project management tools useful e.g., project plan, status reports? | |
| **Criteria** | **Maximum Score 30 points** | **Awarded Score** |
| Evaluation experience | 20 |  |
| Non profit and/or health care | 5 |  |
| Project Management | 5 |  |
| **Total** |  |  |

|  |  |  |
| --- | --- | --- |
| **RFP Section 2.2** | **Desirable Criteria** | |
| **Requirement** | 2.2.3 Approach to data ownership, ethics, and privacy | |
| **Prompts** | **In considering the criteria below, some suggested prompts are:**   1. Does the consultant present a clear strategy on data management?  * Process by which the required data is acquired, validated, stored, protected, and processed, and by which its accessibility, reliability, and timeliness is ensured to satisfy the needs of the data users.  1. Does the consultant speak to ethics and consent? 2. Explicit on PIPA, signing confidentiality agreements etc. | |
| **Criteria** | **Maximum Score 10 points** | **Awarded Score** |
| Privacy | 5 |  |
| Ethics | 5 |  |
| Data Ownership | 0 |  |
| **Total** |  |  |

***A Note about Price/Budget Evaluation***

* Ideally, price/budget will be evaluated after the other criteria have been scored for **ALL proposals** to avoid biasing results toward the lowest price.
* One tactic is to remove price from the evaluation process and only review the price component at the end. For example, the division may instruct proponents to describe budget and price **ONLY** on a separate page at the end of the proposal so the page can be easily omitted from the evaluation.
* Price/budget needs to be evaluated in terms of overall value, including the experience a consultant/firm will bring to the project, as a consultant/firm with less experience may provide a lower hourly price, but the savings will be lessened in the learning they will need to do.

## Price/Budget Evaluation

|  |  |  |
| --- | --- | --- |
| **RFP Section 2.2** | **Desirable Criteria** | |
| **Requirement** | 2.2.4 Hourly rate and anticipated distribution of costs, and total price. | |
| **Prompts** | **In considering the criteria below, some suggested prompts are:**   * Does the proposal provide sufficient budget detail so the division can see how the funds will be spent? * Is the hourly rate reflective of the years of experience? If there is a project team, has the firm offered value by prorating the services e.g., admin, project management? * Based on the overall proposed price, have all the evaluation components been accounted for? * Does the consultant provide any value add e.g., in-kind contribution from a partnership or extra service they offer at a discounted price? | |
| **Criteria** | **Maximum Score 30 points** | **Awarded Score** |
| Budget is clear | 10 |  |
| Hourly rate | 10 |  |
| Lump sum price | 5 |  |
| Value Add | 5 |  |
| **Total** |  |  |

**Stage 3:** Proposals will be ranked. The proposal consultant/firm who achieves the highest overall ranking and is within the budget, achieves the highest total score.

## Proposal Scoring Summary Template - modify as per your division's need

**Proposal Submission List - Team Leader to fill in Consultant Name or Firm Name**

1. **Score 1 - \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**
2. **Score 2 - \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**
3. **Score 3 - \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**
4. **Score 4 - \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Summary Scoring Worksheet Per Consultant/Firm for the Requirements** | | | | | |
| **RFP Section 2.2.1** | **Desirable Criteria -**  **Proposed Approach** | **Consultant/Firm Comparison** | | | |
|  | **Maximum Score Available** | **Score # 1** | **Score # 2** | **Score # 3** | **Score # 4** |
| **Total** | **30 points** |  |  |  |  |
| **RFP Section 2.2.2** | **Desirable Criteria -**  **Experience** | **Consultant/Firm Comparison** | | | |
|  | **Maximum Score Available** | **Score # 1** | **Score # 2** | **Score # 3** | **Score # 4** |
| **Total** | **30 points** |  |  |  |  |
| **RFP Section 2.2.3** | **Desirable Criteria -Approach to data, ethics and privacy** | **Consultant/Firm Comparison** | | | |
|  | **Maximum Score Available** | **Score # 1** | **Score # 2** | **Score # 3** | **Score # 4** |
| **Total** | **10 points** |  |  |  |  |
| **RFP Section 2.2.4** | **Desirable Criteria - Hourly Rate and Budget** | **Consultant/Firm Comparison** | | | |
|  | **Maximum Score Available** | **Score # 1** | **Score # 2** | **Score # 3** | **Score # 4** |
| **Total** | **30 points** |  |  |  |  |
| **Overall Totals** | **100 points** |  |  |  |  |

**Consultant/Firm With the Highest Overall Score: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

* Should a tie occur, the division may undertake another process to determine the successful proponent e.g., interviews, written clarification or asking for a presentation on a specific topic area.
* Once all proposals are scored, the evaluation session is concluded. The division will inform successful and unsuccessful consultant/firm (s) of the results, and enter into contract negotiations with the successful consultant/firm (s).
* A division may wish to consider adding a clause to the RFP that specifies if the division is unable to reach a mutual agreement with the successful consultant/firm, the division has full discretion to move to the next suitable consultant/firm.

**Stage 4:** The X Division should check client references. The X Division, at its sole option, will reject proposals that fail this reference requirement.

**Stage 5:** Proposal consultant/firm (s) will be notified of the results.

**Miscellaneous Information for Divisions**

**Reservation of Rights:**

* The X Division of Family Practice reserves the right, in its sole and absolute discretion to: At any time, for any reason, reject any and all proposals, and terminate the process under this RFP, and proceed with the work as described in this RFP in some other manner, including reissuing a RFP or undertake another process for the same or similar scope of work.

**Acceptance of Proposals:**

* This RFP should not be construed as an agreement to purchase goods or services. The X Division is not bound to enter into a Contract with the Proponent who submits the lowest priced proposal or with any Proponent. Proposals will be assessed in light of the evaluation criteria.

**Contract Templates:**

* Divisions are advised to use legally vetted service agreements, and to seek legal or contract advice if the division chooses to re-write any of the clauses.

**Appendix I - Example of a Simpler Scoring Scheme**

**A more simple scale, 0 to 3 range, where your requirements are:**

* not met (0),
* partially met (1),
* fully met (2),
* exceeded (3).

**Begin Rating Process for the Desirable Criteria**

**Consultant/Firm # 1: Susie Smith**

|  |  |  |
| --- | --- | --- |
| **RFP Section 2.2** | **Desirable Criteria** | |
| **Requirement** | * 2.2.1. Proposed approach | |
| **Prompts** | **In considering the criteria below, some suggested prompts are:**   * Is the overall approach tailored to the needs of the Division, and is it well-supported?   + Is the reasoning behind the approach sound? * Is the timeline realistic? * Is the methodology clear? * Are the proposed tools appropriate for the goal of the evaluation and the available resources? | |
| **Criteria** | **Available Score** | **Awarded Score (example)** |
| 1. Overall Approach | 0 to 3 | 2 - fully met |
| 1. Proposed tools e.g., survey, logic model | 0 to 3 | 2 - fully met |
| 1. Methodology | 0 to 3 | 2 - fully met |
| 1. Timeline | 0 to 3 | 3 - exceeded |
| 1. Reporting plan | 0 to 3 | 1 - partially met |
| **Total Score** | **15 points** | **10** |

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Summary Scoring Worksheet Per Proponent for the Requirements** | | | | | |
| **RFP Section 2.2.1** | **Desirable Criteria -**  **Proposed Approach** | **Consultant/Firm Comparison** | | | |
|  | **Maximum Score Available** | **Score # 1**  **S. Smith** | **Score # 2** | **Score # 3** | **Score # 4** |
| **Total** | **15 points** | 10 |  |  |  |