



EVALUATION COMMITTEE GUIDELINES

Note: This document is a general guideline for Agencies to use and may be customized to meet individual Agency needs.

GENERAL

1. The Contracts Officer will distribute and collect a signed *Evaluation Committee Member Non-Disclosure and Conflict of Interest Disclosure Statement* from each committee member. The Contracts Officer will check each statement to ensure it is signed and unmodified. For any committee member not in attendance at the scheduled meeting, responses will be provided once the *Non-Disclosure and Conflict of Interest Disclosure Statement* is signed, and participation in an evaluation committee briefing has occurred.
2. The Contracts Officer will hand out evaluation packages to each committee member. Each package should include the following:
 - ✓ Copy of the *Non-Disclosure and Conflict of Interest Disclosure Statement*. Committee members should each have a copy of the *Non-Disclosure and Conflict of Interest Disclosure Statement* as a reminder of their responsibilities.
 - ✓ Copy of the Evaluation Committee Briefing document.
 - ✓ Complete copy of the solicitation and any addenda and Q&A documents. (Members should already be familiar with these documents before the meeting).
 - ✓ Copy of each responsive response received.
 - ✓ Evaluation Committee Member Scoring Matrix. (If hard copy, provide the appropriate number of copies for the number of responses received).
 - ✓ The Contracts Officer will review the briefing document (see attached) with the committee.
 - ✓ The Contracts Officer will explain the scoring process and walk through the evaluation scoring matrix to ensure each scoring committee member understands how the matrix works and how the responses will be evaluated.
3. Generally, the Contracts Officer remains during the meeting to answer any questions and ensure proper procedures are followed. The preferred practice is for the evaluation committee to conduct their evaluations simultaneously in the same room. Sometimes, due to time constraints, remote location of committee members, or other circumstances, it is only possible for some members to be together for the evaluation. If the evaluation committee conducts their evaluation from their respective workspaces, the Contracts Officer will provide a deadline for when the evaluation scoring matrices are to be completed.
4. After the evaluation, the evaluation scoring matrices are submitted to the Contracts Officer and maintained in the procurement file.



EVALUATION COMMITTEE BRIEFING

Committee Members

- Committee members must be independent and objective without conflict of interest.
- Each committee member's participation should not create even the appearance of impropriety.
- Each committee member must comply with the Agency and State's conflict of interest disclosure policies.
- Each committee member must sign the *Evaluation Committee Member Non-Disclosure and Conflict of Interest Disclosure Statement*.
- Each committee member must be knowledgeable about the matter under evaluation and add value to the process.
- All committee members must attend every evaluation meeting, each oral presentation, and all site visits to respondent premises.

Evaluation and Scoring

- Each scoring committee member will independently and impartially score each response using only the evaluation factors and weights identified in the solicitation.
- Scores are not divulged between committee members. Members may ask questions if they cannot find information, do not understand the information in a response, or require the technical assistance of other members.
- Evaluations by the committee are based solely on the written responses, oral presentations, or other factors as instructed by the Contracts Officer and assigned attorney for that particular solicitation and consistent with the solicitation.
- Committee members may not conduct their own research on respondents (such as online research) and may not consider any independent research or other extraneous information in their scoring.
- With the approval of the Contracts Officer or assigned attorney as applicable, the chair may appoint one or more committee members to assist with specific administrative tasks (such as checking references), which are allowable under the solicitation.
- The committee may determine that clarification of the response is necessary before scoring. The Contracts Officer or the assigned attorney will submit written clarification questions to the respondents as appropriate.
- Each committee member will record the scores for each response on the scoring matrix provided by the chair.
- Some solicitations may involve multiple scoring rounds to narrow the competitive field. The Contracts Officer will brief the committee if the solicitation involves that possibility.



- The committee may determine that requests for oral presentations by all or only the top-rated respondents are desirable and consistent with the solicitation. As appropriate, the Contracts Officer or the assigned attorney will notify the respondents about oral presentations.
- The chair will tally the individual committee member's evaluation scores and provide the committee with a master score sheet showing the total scores.
- Each committee member will review the master score sheet to verify the accuracy of the scoring.
- Committee members will not lobby each other to change scores; however, the chair may discuss the portions of the responses from which the scores were derived to ensure that each member understood that portion of the solicitation and the response.
- The Contracts Officer, with assistance from the assigned attorney if needed, will verify that each committee member used the appropriate scoring method.
- The chair will prepare, sign and date the evaluation committee's master score sheet.
- The chair will prepare the appropriate internal approval memo (e.g., recommendation of tentative contract award memo, recommendation to narrow the competitive field memo, recommendation to cancel procurement).

Confidentiality

- All evaluations and responses are highly confidential and may not be disclosed. The committee members must safeguard the responses.
- Evaluations, including comments made on score sheets, are subject to the Montana Public Information Act. Written comments on score sheets are not discouraged. Evaluation committee members' written comments may aid the reviewer when the score is unusually low or high. Evaluation committee member comments are also helpful in the event of a debriefing as they may assist a respondent in identifying the strengths and weaknesses of the response.
- Committee members may not communicate with respondents or anyone else outside the committee regarding the responses received or the evaluation process without prior approval of the Contracts Officer or the assigned attorney, as appropriate.