



MONTANA DEPARTMENT OF ADMINISTRATION

Director's Office

Greg Gianforte, Governor
Misty Ann Giles, Director

doa.mt.gov
406.444.2460
doadirector@mt.gov

RFP Roles and Responsibilities

Agency Procurement Officers' (APO) responsibilities:

- Utilize current forms and templates on the State Procurement Services Division website.
- Ensure all final versions of the solicitation are uploaded in the initial request and in final format.
- Identify a Project Lead, if other than the APO
- Ensure timeliness when responding to Q&A responses.
- Identify evaluation committee members and Subject Matter Experts (SME) as early as possible to ease scheduling conflicts.
- Assign an Agency Lead who will assist the Contracts Officer in scheduling meetings and administrative tasks and record meeting minutes of the evaluation of the RFP. The agency lead is also responsible for reviewing any public comment received during the 7-day NOIA period.

Before releasing proposals to the evaluation committee, the Contracts Officer (CO) assigned to the RFP will conduct a pre-evaluation meeting and:

- Distribute and collect signed Non-Disclosure and Conflict of Interest Certification from each committee member and SME. Signed certificates must be submitted to the State Procurement Services Division before proposals are released to committee members.
- Discuss expectations and layout of the evaluation meeting.
Evaluation meetings are not public meetings; however, they are recorded, and if a request is received, the recordings will be turned over to the Office of Public Information Requests.

Once all signed certificates have been received, evaluation committee members will receive:

- A complete copy of the solicitation, any addenda, and all documents from the Q&A board;
- A copy of each responsive proposal received for the independent scoring;
- Scoring Matrix- the CO will provide a comprehensive overview of the scoring document and how the responses will be evaluated per the material posted in the solicitation.

Independent Evaluation

Committee members will be responsible for:

- Attend all meetings regarding the evaluation of the solicitation, i.e., pre-evaluation meetings, evaluation meetings, oral interviews, product demonstrations, and any debriefing meetings requested by Offerors after the award.
- Observing the CO as their single point of contact for any questions, clarifications, or technical assistance.
- Scoring each proposal independently, objectively, and without conflict of interest, avoiding the appearance of impropriety.
- Evaluate the proposals based solely on written responses to the technical requirements, oral interviews, or product demonstrations.



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- Participate actively in the evaluation meeting, ensuring the individual scoring matrix is filled out accordingly and ensuring all justifications are appropriate and pertain to the information in the Offeror's response.

Committee members will not:

- Discuss specifics of the proposals or the evaluation with anyone other than the CO while conducting the independent review
- Conduct outside research during the independent evaluation, i.e., an online study of the Offeror's product/service.
- Compare Offeror's proposals.
- Lobby or attempt to persuade another committee member to change scores to sway the scoring.

Subject Matter Experts (SME) will be responsible for:

- Ensuring no conflicts exist by submitting a signed Non-Disclosure and Conflict of Interest Certification
- Reviewing proposals or sections of proposals as the subject matter expert.
- Provide advice and/or clarity when sought.
- Attend all meetings if required.

SMEs will not:

- Discuss specifics of the proposals or the evaluation with anyone other than the CO while conducting the independent review
- Conduct outside research during the independent evaluation, i.e., an online study of the Offeror's product/service.
- Compare Offeror's proposals.
- Lobby or attempt to persuade another committee member to change scores to sway the scoring.

Evaluation meeting

The committee will meet to discuss all aspects of the Offeror's proposals and reach a 'unified understanding' of the criteria and the corresponding responses. Each member will state their score and the mandatory justification. After all committee members have provided the individual scores, the committee will discuss and establish a final score. The final score can use the following methods to reach a final score.

- Consensus Score
- Total of all points
- Average score

The scoring method must be established before the scoring begins, and all proposals must be scored similarly. Once the evaluation process has been completed, all individual scoring matrices must be submitted to the CO.



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Once the technical scoring has concluded, the next steps will be defined. If a product demo or oral interview was included in the posted evaluation criteria, the committee will determine which Offerors will receive an invitation to move forward.

Product Demonstrations/Oral Interviews

Once the evaluation committee identifies which Offeror (s) will be invited to the second evaluation stage, the CO will identify available dates and times and notify the Offerors of available slots. If multiple offerors are invited to the second stage, the available timeslots must be assigned randomly.

If the committee wishes to set an agenda or has specific topics it would like to cover during the presentation, it must provide this information to the Offerors within a reasonable time to allow the companies to prepare.

During the presentation, committee members will be responsible for:

- Scoring each presentation independently, objectively, and without conflict of interest, avoiding the appearance of impropriety
Participate actively in the presentation, ensuring the individual scoring matrix is filled out accordingly and ensuring all justifications are appropriate and pertain to the information in the Offeror's demonstration/interview. Product Demonstration/Oral Interviews are not public meetings; however, they are recorded, and if a request is received, the recordings will be turned over to the Office of Public Information Requests.

The evaluation committee may score immediately following each Offeror's presentation or wait until all the Offerors have presented and meet once again to score the second round of evaluation criteria. This will need to be determined before the presentations begins.

Recommendation to Award

After the technical portion has been scored, and demonstrations/interviews have been conducted, the committee will provide the Contracts Officer with a Recommendation to Award memo, which should include:

- Justification of the rationale for the committee's decision
- The scoring method used when evaluating the proposals.
- Signatures of the evaluation committee members

Finalizing the Award

Once the recommendation to award has been received and reviewed by the CO. The State Procurement Services Division will send out a Request for Documents to the tentative highest-scoring offeror; this requests the following information:

- All insurance certificates required within the solicitation
- Security documents if applicable
- Next steps for being properly set up in the States eProcurement system
- Finalized scoring matrix



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Unsuccessful Offerors will receive a notification from SPSD, notifying them of the solicitation's outcome and the final scoring matrix.

A Notice of Intent to Award (NOIA) will be posted to the state public bidding site for seven calendar days. It will outline the state's intent to award to the highest-scoring offeror and the basis for this determination. Negotiations can be conducted concurrently with these 7 days. A contract may be executed once the NOIA has been posted for the period required by statute and negotiations have concluded.