

To: Evaluation Committee Members

Re: Rules and Regulation regarding RFP proposal evaluation

Thank you for your willingness to serve on the Evaluation Committee for this Request for Proposal (RFP). The Project Manager in conjunction with Purchasing will act as the facilitator for this process. Purchasing will act as the consultant on contractual and procedural matters but will not be a voting member of the Committee.

Accountability:

One purpose of this memo is to inform you of the evaluation process and the responsibility of the Evaluation Committee. The role of the Evaluation Committee is **public**, and as a member you are accountable for everything you say, write, and do regarding this Solicitation and the proposal receipt and evaluation process.

Please do:

- Refer all questions from inside/outside of the Committee to Purchasing.
- Refer all requests for proposal clarifications to Purchasing.

Please do not:

- Discuss any aspect or opinion of Proposers, proposals, or proposal ranking outside the Committee setting;
- Interact with other members of the Committee concerning the proposals except when in a full committee setting;
- Accept any type of gift or consideration from any Proposer;
- Give preferential treatment to any Proposer.

The Evaluation Committee has the burden of determining compliance with Solicitation requirements and must provide evidence for Purchasing to use to defend any rejections or low point scores, if challenged. Be thorough. Proposals must be fully compliant with all requirements of the Solicitation, or they must be rejected. The Evaluation Committee does, however, have the prerogative to waive minor inconsistencies with Solicitation requirements in consultation with Purchasing.

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Confidentiality:

Maintain confidentiality. Do not transmit, communicate, or otherwise convey preliminary conclusions or results of what was offered by the proposers, or that a given proposer is being selected. All internal workings of the Committee must be kept confidential until the Committee has completed its work, provided its recommendation, and the selected Proposer has been officially announced by the Purchasing Department. Further, the number of proposals received, the identity of the Proposers, or the contents of any Proposal will not be disclosed to the public until the Notice of Intent to Award is published.

Fair and Equal:

Perform a fair evaluation of each proposal and set aside prejudices. Do not make any derogatory, prejudicial or slanderous remarks about any Proposal/Proposer. Do not base your evaluation scores on past experiences with

a Proposer. Base your scores on what the Proposer has written as it relates to the evaluation criteria.

Conflict of Interest:

All members of the Evaluation Committee must sign a Certification of Non-Conflict of Interest statement prior to serving on the Committee, which declares “real” and/or “potential” conflicts of interest, including what may be ***perceived*** as a conflict of interest. The statement is included in the Evaluation packet. In the event a conflict of interest does exist, it is in everyone's best interest that the member be replaced on the Committee.

Evaluation Criteria:

The Evaluation packet includes a copy of each responsive proposal and a summary of the evaluation criteria. Proposals must address all the Proposal and submission requirements set forth in the Solicitation document and must describe **how** the services will be provided. Proposals which merely offer to provide services as stated in the Solicitation may not be considered favorably.

Scoring Methodology

The Cost Criteria will be scored by Purchasing. This portion of each proposal is excluded from the technical proposal copies given to the Evaluation Committee members.

The Evaluation Committee evaluates and scores each technical proposal based on the evaluation criteria and scoring methodology established in the Solicitation.

Do not discuss scoring numbers. The evaluators must read the proposals and score them individually as presented in the solicitation. Each Evaluator should feel comfortable with the justification and defense of each score so that any possible perception of bias is eliminated, should there be a protest of contract award. Proposal evaluations and scores become part of the Solicitation and contract files. Please note that these are ***public records***. Any comments written on the evaluation forms become public information. Proposers may review the evaluations of all proposals and may use the information to determine whether to submit a protest.

Scoring / Selection and Announcement of Contract Award

Upon the Committee's acceptance of the top scoring technical and cost proposals, Purchasing will prepare the required written Notice of Intent to Award (NOI), announcing the apparent successful Proposer and the District's intent to award a contract. There is a Protest period following the NOI. At the end of the award protest period for this Solicitation, the Purchasing Manager will pursue contract execution.

Penalties for Violation

Public employees may be liable under ORS 291.990 and 294.100 for improper use of State funds. Public employees who order, authorize, or cause to be made any expenditure in violation of State Statutes, rules, policies, or procedure can be subject to fines and penalties and be held personally financially liable for inappropriate expenditures.

Erosion of trust by taxpayers could result in decreased community support and revenues. Lack of trust by the vendor community could result in contract award protests or an unwillingness to submit bids, thus decreasing competition and potentially increasing the cost of goods or services.

A District employee may not be deemed to have a conflict of interest as long as, at the earliest opportunity after having acquired knowledge of the conflict, he/she discloses the conflict of interest in writing to the Purchasing Manager; and Disqualifies himself/herself from participating in any purchasing decision.

EVALUATOR # _____

Evaluation Committee Rules and Regulations

I hereby declare that I have read and understood the Rules and Regulations set forth in this document and I agree to comply with these rules and any applicable State and/or District Rules, Regulations and Policies as they pertain to the evaluation process.

Pat McCreery



March 8, 2021

Name (Printed)

Signature

Date

Certification of Non-Conflict of Interest

I, **Pat McCreery**, hereby certify that I have read the statement defining conflict of interest quoted below; that I understand the statement; that no conflict of interest exists as therein defined which precludes an impartial evaluation of proposals to be considered by me, and that if such a conflict should arise, I will immediately disqualify myself from this evaluation/selection process.

“A conflict of interest exists whenever there is a situation in which an evaluation committee member, advisor or consultant may have, or be perceived to have, a financial or other interest or prejudice through current or past association or relationship with any responding Proposer.”

Potential conflict declared? Check one. ☐ Yes ☒ No

Evaluation Committee Member Number/Name Pat McCreery (non-evaluator, project lead)
(Please print or type)

Evaluation Committee Member Signature



Position / Title

Administrator for Equity and Inclusion, Beaverton School District

EVALUATOR _____