

Evaluating Proposals Received in Response to an RFP  
Training for Evaluation Team

AGENDA (SAMPLE)

- I. **Summary of the RFP Process**  
*(Describe process, fair and open process, what applicants may protest, etc.)*
- II. **Applicants**  
*(Evaluators need to know applicant names to determine if there is a conflict of interest. Advise evaluators if applicants are known by other names (AKAs).)*
- III. **Conflicts of Interest**  
*(Describe examples of conflicts of interest, ask questions.)*
- IV. **Confidentiality**  
*(Describe their responsibility with regard to confidentiality of the proposal contents, emphasize that it is important not to discuss proposal contents with friends or family, and to keep the proposals in a secure place if the proposals are allowed to be taken home.)*
- V. **The RFP**  
*(Orient the evaluators to the RFP. If there are any issues that may come up, point them out in the RFP and have them mark them. Ensure each evaluator has a copy of the RFP.)*
- VI. **The Evaluation Process**  
*(Explain in detail how proposals will be evaluated, what documentation must be kept, any scoring mechanisms to be used, documentation that must be turned in to the person conducting the procurement, etc.)*
- VII. **The Evaluation Criteria**  
*(Review in detail each evaluation criteria. Describe how each must be scored. This may take a while, but will save everyone time later.)*
- VIII. **The Statement of Findings and Decision and Evaluation Scoresheet**  
*(Review the evaluation scoresheet. If it will be a group evaluation and someone else will be recording scores and comments, describe the process. Show the evaluators formats of documents each applicant will receive in the notice of award/nonaward. This will help them formulate comments.)*
- IX. **Questions and Answers**  
*(It is extremely important to allow time for questions prior to evaluating proposals.)*