Company RFP Evaluation Team Handbook

# Introduction

Congratulations! You have been selected to serve on the **Evaluation Team** for a **Request for Proposal (RFP)** at CompanyLegal Aid. Your role in this process is essential in ensuring that we select the best vendor to support our mission and deliver high-quality, cost-effective solutions that align with our strategic objectives.

The **RFP process** is designed to balance **cost efficiency and service quality** while maintaining fairness and transparency for all vendors participating in the selection. As an evaluator, your role is to **objectively assess proposals** based on the published evaluation criteria and contribute to a recommendation that best meets Company’s needs.

Before committing to this role, please review the expectations outlined in this handbook. Serving on the Evaluation Team may require **focused effort and attention to detail**, including time for individual proposal reviews, scoring, and team discussions. If you have any concerns or scheduling conflicts, please notify the designated Procurement Lead before proceeding.

The Evaluation Team: Roles and Responsibilities

# Composition of the Evaluation Team

The **Procurement Lead** and the requesting department will determine the **size and composition** of the Evaluation Team. Typically, teams include **three to five members**, but this may vary depending on the scope of the RFP. The team may consist of **Company staff from different departments** to bring diverse perspectives. In some cases, external subject matter experts may also participate.

## Roles and Responsibilities

* **Evaluation Team’s Role:**
	+ Review and score vendor proposals based on **published evaluation criteria** in the RFP.
	+ Participate in **team discussions** to ensure a thorough and fair assessment.
	+ Recommend a **vendor or vendors** based on the evaluation results.
* **Evaluator’s Role (Your Role):**
	+ **Independently review and score proposals** based solely on the RFP criteria.
	+ **Provide objective, fair, and documented justifications** for your scores.
	+ **Maintain confidentiality** and avoid conflicts of interest throughout the process.
	+ Participate in **evaluation meetings** to discuss scoring and finalize recommendations.
* **Procurement Lead’s Role:**
	+ Serve as the **Evaluation Team chairperson** and oversee the RFP process.
	+ Ensure **fairness, transparency, and adherence to Company’s procurement policies**.
	+ Provide **clarifications and guidance** on the evaluation process.
	+ Facilitate finalizing the **evaluation results and vendor recommendation**.
	+ Coordinate the **contract negotiation process** alongside the requesting department as needed.

By serving on this team, you play a critical role in ensuring that Company selects a vendor that will provide **high-quality solutions aligned with our mission**. Your contributions will help enhance **organizational efficiency, service delivery, and long-term impact**.

Thank you for your time and commitment to this important process!

Company Legal Aid – RFP Evaluation Guidelines

# Request for Proposal (RFP) Overview

All **Evaluation Team members** must thoroughly review the **Request for Proposal (RFP)** before beginning the evaluation process. The RFP outlines:

* The **project requirements**,
* The **proposal submission guidelines**, and
* The **evaluation criteria** that will be used to assess vendor responses.

# Responsiveness Review

Before distributing proposals to the Evaluation Team, the **Procurement Lead** will conduct an initial **responsiveness review** to ensure that all proposals meet the basic requirements outlined in the RFP. This step prevents the Evaluation Team from reviewing proposals that cannot be considered for award.

A vendor’s proposal is considered **“responsive”** if it has been submitted in **full compliance** with the RFP requirements. If, during further review, the Evaluation Team finds that a proposal is **non-responsive** (i.e., missing required elements such as references or mandatory forms), it will be **disqualified from further evaluation**.

If references are required in the RFP but are not provided, the proposal will be deemed **non-responsive** and will not be evaluated further.

# Initial Meeting of the Evaluation Team

Before distributing proposals, the **Procurement Lead** will convene a meeting with the Evaluation Team to:

* Review the **proposal review and scoring process**,
* Ensure all team members understand the **scoring methodology** and **evaluation criteria**, and
* Discuss any **questions or clarifications** related to the evaluation process.

Each evaluator will receive:

* A copy of each **responsive proposal**, and
* An **evaluation worksheet** to record scores and observations.

The Procurement Lead will also establish a **timeline for proposal evaluations**, ensuring that all team members have adequate time to **review, score, and discuss** the proposals.

Evaluation Process & Methodologies

There are several **approved methods** for conducting the evaluation and documenting results.

**Option 1: Individual Scoring with Compiled Results**

* Each **Evaluation Team member** independently **reviews, scores, and records** their assessments using the **evaluation worksheet**.
* The **Procurement Lead or designee** collects all individual scores, checks for errors, ensures clarity in comments, and **compiles a summary of the team’s collective recommendation**.
* Each team member’s **score is weighted equally**, and a **final recommendation** is made based on the compiled results.

**Option 2: Group Discussion & Consensus-Based Scoring**

* Each team member **reviews proposals individually** and makes **tentative notes** on their evaluation worksheets.
* The **Evaluation Team meets collectively** to discuss each proposal, compare assessments, and arrive at a **consensus score** for each evaluation criterion.
* A **summary report** documenting the team’s final decision is created.

**Option 3: Shortlist & Secondary Evaluations**

* The Evaluation Team **uses either Option 1 or Option 2** to create a **shortlist** of the highest-scoring vendors.
* Shortlisted vendors may be required to participate in additional **evaluation rounds**, such as:
	+ **Oral presentations or interviews,**
	+ **Demonstrations of proposed solutions,**
	+ **Final cost assessments or best-and-final offers.**
* The team then **re-evaluates and ranks** the shortlisted vendors to make a final recommendation.

Finalizing the Evaluation Approach

**The Procurement Lead and requesting department** will determine which **evaluation methodology** (individual scoring, consensus-based scoring, or shortlisting) will be used. This ensures that the **evaluation process remains structured, fair, and transparent**.

By following this structured evaluation framework, Company Legal Aid ensures that **all proposals are reviewed equitably, vendor selections are based on objective criteria, and the process aligns with our mission and procurement policies.**

CompanyLegal Aid – Evaluation Worksheet Guidelines

# Purpose of the Evaluation Worksheet

The **Evaluation Worksheet** is a critical tool designed to assist **Evaluation Team members** in their review and scoring of vendor proposals. This worksheet provides:

* A structured **list of evaluation criteria**,
* A **standardized rating scale**, and
* A method for **consistent and objective assessment** across all proposals.

The **evaluation worksheet does not include pricing information**, as pricing is evaluated separately to ensure fair and unbiased scoring. **Company Legal Aid – Proposal Evaluation Guidelines**

# Reviewing and Evaluating Proposals

To ensure a **fair and objective** evaluation process, **Evaluation Team members** should follow these steps when reviewing proposals:

1. **Initial Review (Without Scoring):**
	* Read each proposal **thoroughly** before assigning any scores.
	* Familiarize yourself with the **vendor’s approach, qualifications, and proposed solutions** without making comparisons between proposals.
	* Note any **concerns or clarifications needed** but refrain from scoring at this stage.
2. **Detailed Evaluation (Scoring):**
	* Review the proposal **against the evaluation criteria outlined in the RFP** to assess the **quality and degree of compliance**.
	* Take **notes and reference page numbers** to justify your assessments.
	* Assign **tentative ratings** based on the evaluation worksheet.
	* Be mindful that evaluation forms may become **public records** after the selection process.
3. **Reporting Compliance Concerns:**
	* If you believe a proposal **fails to meet mandatory requirements** (e.g., **minimum experience, required licenses, or certifications**), contact the **Procurement Lead** immediately.
	* If you have **questions about the scoring process**, seek clarification **before finalizing your evaluation**.
4. **Individual & Confidential Review:**
	* Evaluators must **independently** review and score proposals **without discussing** their assessments with other team members.
	* Do not communicate with any **bid respondents** at any point in the process.
	* If a bid respondent attempts to contact an evaluator, notify the **Procurement Lead** immediately.
5. **Focus on RFP Criteria, Not Direct Comparisons:**
	* While some level of comparison is natural, **proposals should be evaluated individually** based on how well they meet the **stated evaluation criteria**.
	* Evaluators should record **brief, objective comments** to support their scores, explaining **why** points were awarded or withheld based on the RFP criteria.

# Consolidation of Individual Evaluation Scores

Once all evaluators have **completed their individual assessments**, the Evaluation Team will meet to:

* **Discuss proposal strengths and weaknesses** and clarify any **misinterpretations or missing details**.
* If necessary, the **Procurement Lead** may request clarification from a vendor, but this communication **cannot result in material or substantial changes** to the proposal.
* Evaluators may **adjust their scores** during this discussion/clarification period.

# Final Score Compilation

* Each evaluator’s **final scores** will be recorded, and the **total combined scores** will be calculated.
* If any scores appear **inconsistent or unusual**, the **Procurement Lead** may ask the evaluator to explain or reconsider their rating.
* Evaluators must ensure their scores are **reasonable, rational, and consistent**, as they may be required to justify them in the event of a vendor protest.
* If individual scores are **aggregated into an overall final score**, the combined **evaluation summary** will become the official record.
* **All individual score sheets** must be submitted to the **Procurement Lead**, who will **retain or securely dispose of them per Company’s record-keeping policies**.

Interviews & Discussions with Vendors

After the initial evaluation, vendors whose proposals are considered **reasonably acceptable** may be invited to participate in **interviews or discussions** with the Evaluation Team.

# Planning for Interviews:

* The **Procurement Lead and requesting department** will determine **before issuing the RFP** whether interviews will be part of the evaluation process.
* They will also decide **which vendors qualify for interviews** (e.g., **top-scoring vendors, those scoring above a threshold, etc.**).
* Interview questions, topics, and evaluation criteria should be **agreed upon by the Evaluation Team before contacting vendors**.
* The **Procurement Lead** will:
	+ Send vendors an **interview agenda** with questions/topics in advance.
	+ Schedule the meetings to allow vendors **sufficient time to prepare**.
	+ Provide **evaluation sheets** for team members to score the interviews.

# Fairness & Confidentiality During Interviews:

* All vendors must be treated **equally** in discussions.
* Evaluators **must not disclose one vendor’s pricing, proposal details, or any proprietary information** to another vendor.
* Vendors **cannot modify their RFP response** during interviews.

By following these guidelines, Company Legal Aid ensures that the **proposal evaluation process remains fair, objective, and aligned with our mission and procurement policies**.

Guidance for Evaluating RFP Criteria for CompanyLegal Aid

This structured evaluation framework provides Company Legal Aid with a **clear, weighted, and mission-aligned** method for selecting vendors based on their qualifications, technical expertise, cost assessment, project management, and alignment with Company’s goals.

# 1. Qualifications and Experience (20%)

**Key Aspects to Evaluate:**

* Relevant **experience and credentials** of the team assigned to Company.
* Demonstrated ability to **work with nonprofit organizations** and support missions aligned with **social justice, legal aid, and public service**.
* Clear understanding of **Company’s mission, values, and internal equity commitments**
* Experience working with **legal aid organizations, community-based groups, or similar nonprofit entities**.
* Past projects **similar in scope and complexity** to Company’s requirements.
* Certifications, specialized training, and industry recognition.

**Scoring Guidelines:**

|  |  |
| --- | --- |
| Score | Evaluation Criteria |
| 5 - Excellent | Highly experienced team with deep expertise, strong alignment with Company’s mission, and extensive relevant project history in the nonprofit sector. |
| 4 - Good | Strong team credentials with relevant experience, but missing specific nonprofit sector expertise or mission alignment. |
| 3 - Average | Meets basic requirements but lacks demonstrated alignment with nonprofit values or Company’s equity commitments. |
| 2 - Below Average | Limited relevant experience and no strong nonprofit alignment. |
| 1 - Poor | Insufficient detail on qualifications, experience, or mission alignment. |

## Key Questions:

* **Team Expertise & Roles:**
	+ What are the qualifications, credentials, and professional backgrounds of the team members assigned to this project?
	+ Have the proposed team members worked together on similar projects? If so, please provide examples.
	+ How does the vendor’s experience align with the specific needs of Company Legal Aid?
* **Nonprofit and Legal Aid Experience:**
	+ What experience does the vendor have working with nonprofit organizations, particularly in the legal aid or public service sectors?
	+ How does the vendor’s past work demonstrate an understanding of **equity, access to justice, and nonprofit operations**?
* **Mission & Values Alignment:**
	+ How does the vendor’s approach align with **Company’s mission and internal equity statements**? (Refer to [www.Companylegalaid.org](https://www.lakeshorelegalaid.org))
	+ Can the vendor provide examples of projects where they worked with mission-driven organizations to enhance knowledge sharing and technology adoption?

# 2. Technical Expertise (20%)

**Key Aspects to Evaluate:**

* Demonstrated ability to **evaluate, recommend, and implement technology solutions** based on user needs, business goals, and operational requirements.
* Expertise in **knowledgebase solutions**, including systems for **managing, categorizing, and retrieving information efficiently**.
* Experience with **integration into existing platforms** such as case management systems, SharePoint, Salesforce, or other nonprofit-focused tools.
* Ability to support **scalable, flexible, and accessible solutions** for a diverse user base, including legal professionals and clients.
* Understanding of **user experience (UX) principles, accessibility standards, and workflow optimization**.

**Scoring Guidelines:**

|  |  |
| --- | --- |
| Score | Evaluation Criteria |
| 5 - Excellent | Deep expertise in knowledgebase solutions with a strong track record of evaluating and proposing tailored technology solutions. Demonstrates clear understanding of user needs and technical best practices. |
| 4 - Good | Strong technical background, but limited examples of evaluating and proposing solutions tailored for legal aid or nonprofit environments. |
| 3 - Average | Basic knowledge of knowledgebase solutions with experience in general technology consulting, but lacks depth in assessment and recommendation processes. |
| 2 - Below Average | Limited expertise in knowledgebase solutions or lacks experience in evaluating and recommending solutions. |
| 1 - Poor | No demonstrated experience with knowledgebase systems or solution evaluation. |

**Key Questions:**

* **Technology Assessment & Solution Development:**
	+ What methodology does the vendor use to evaluate, propose, and implement technology solutions?
	+ How does the vendor ensure that the **proposed knowledgebase solution** meets accessibility, security, and usability standards?
	+ What experience does the vendor have in developing or enhancing **knowledgebase systems** (e.g., Legal Server, SharePoint, or similar platforms)?
* **Integration & Scalability:**
	+ How does the vendor’s proposed solution integrate with existing **case management, document management, and legal aid technologies**?
	+ Can the vendor provide examples of past projects where they successfully integrated a knowledgebase with other nonprofit technology platforms?
	+ How does the vendor’s solution scale to accommodate **future organizational growth, evolving user needs, and process improvements**?
* **User-Centered Design:**
	+ How does the vendor incorporate **user experience (UX) best practices** into their technical solutions?
	+ What strategies does the vendor use to ensure that solutions are **intuitive and user-friendly** for non-technical staff?

# 3. Approach to Assessing Cost Models (15%)

**Key Aspects to Evaluate:**

* Clear ability to **assess the full cost of proposed models**, including:
	+ **Initial implementation costs** (hardware, software, licensing, consulting fees).
	+ **Long-term maintenance costs** (renewals, upgrades, training, support).
	+ **Scalability and flexibility** of the pricing model for future growth.
* Transparent cost breakdowns with **justifications for each expenditure**.
* Evidence that the vendor has successfully implemented **cost-effective, sustainable solutions** for other organizations.
* No hidden fees or unpredictable cost escalations.

**Scoring Guidelines:**

|  |  |
| --- | --- |
| Score | Evaluation Criteria |
| 5 - Excellent | Clearly outlines upfront and long-term costs, provides a comprehensive cost-benefit analysis, and ensures cost sustainability over time. |
| 4 - Good | Cost breakdown is detailed but lacks a clear assessment of long-term maintenance costs. |
| 3 - Average | Provides basic cost details but lacks transparency on potential long-term expenses. |
| 2 - Below Average | Vague cost structure with limited breakdown of long-term maintenance expenses. |
| 1 - Poor | Does not provide a clear cost assessment or omits key financial considerations. |

**Key Questions:**

* **Cost Transparency & Justification:**
	+ Can the vendor provide a **detailed breakdown of upfront and long-term costs**, including licensing, implementation, and maintenance fees?
	+ What additional costs might arise beyond the initial contract, such as future upgrades, training, or scalability costs?
	+ How does the vendor’s pricing model compare to other similar solutions in the market?
* **Sustainability & Total Cost of Ownership:**
	+ How does the vendor ensure that their solution remains cost-effective **over multiple years**?
	+ What ongoing maintenance and support costs should Companyexpect after implementation?
	+ Does the vendor offer **flexible pricing models** or discounts for nonprofit organizations?
* **Risk Mitigation & Avoiding Hidden Costs:**
	+ Has the vendor identified potential **hidden costs** that Companyshould be aware of?
	+ How does the vendor structure their **support contracts and service level agreements (SLAs)** to avoid unexpected financial burdens?

4.Ability to Produce Deliverables Timely and Adhere to the Proposed Timeline (15%)

**Key Aspects to Evaluate:**

* **Detailed project timeline** with realistic milestones.
* Track record of **meeting deadlines** in past projects.
* **Risk mitigation strategies** for handling potential delays.
* Ability to coordinate with Company’s **internal teams and vendors**.

**Scoring Guidelines:**

|  |  |
| --- | --- |
| Score | Evaluation Criteria |
| 5 - Excellent | Vendor presents a detailed, realistic timeline with a strong track record of meeting deadlines and mitigating risks. |
| 4 - Good | Well-defined timeline but lacks proactive risk mitigation strategies. |
| 3 - Average | Timeline is reasonable, but vendor has a mixed record of meeting deadlines. |
| 2 - Below Average | Unrealistic timeline or lack of detail on how deliverables will be met. |
| 1 - Poor | No clear timeline, or vendor has history of missing deadlines. |

**Key Questions:**

* **Project Plan & Milestones:**
	+ Can the vendor provide a **detailed implementation timeline**, including key milestones and deadlines?
	+ How does the vendor plan to **manage and track progress** to ensure on-time delivery?
* **Risk & Contingency Planning:**
	+ What potential risks does the vendor anticipate, and what strategies do they have for mitigating delays?
	+ How does the vendor handle **unexpected project changes** or new requirements that arise mid-project?
* **Past Performance & Track Record:**
	+ Can the vendor provide examples of **similar projects that were delivered on time and within scope**?

Have any of the vendor’s previous projects faced **significant delays or challenges**? If so, how were they resolved?

# 5. Understanding of and Ability to Meet Company’s Needs (15%)

**Key Aspects to Evaluate:**

* **Depth of research** into Company’s specific challenges.
* Ability to **customize solutions** rather than offering generic responses.
* Vendor’s **proposed approach to problem-solving** in the legal aid environment.
* Commitment to **collaborative, user-centered design**.

**Scoring Guidelines:**

|  |  |
| --- | --- |
| Score | Evaluation Criteria |
| 5 - Excellent | Vendor demonstrates deep understanding of Company’s challenges and presents a tailored, thoughtful solution. |
| 4 - Good | Strong understanding, but limited in proposing unique solutions. |
| 3 - Average | Proposal addresses Company’s needs but is somewhat generic. |
| 2 - Below Average | Limited understanding of Company’s requirements. |
| 1 - Poor | Vendor does not demonstrate a clear understanding of Company’s needs. |

**Key Questions:**

* **Tailored Approach vs. Generic Solutions:**
	+ How did the vendor develop their understanding of Company’s specific needs and challenges?
	+ What **specific features or functionalities** does the vendor propose to address Company’s requirements?
* **Customization & Adaptability:**
	+ How does the vendor’s solution adapt to **Company’s unique workflows, staff roles, and service delivery model**?
	+ Can the vendor provide examples of how they have customized **knowledgebase solutions** for other legal or nonprofit organizations?
* **Stakeholder Collaboration & Engagement:**
	+ How does the vendor plan to **engage Company’s staff** throughout the implementation process?
	+ How does the vendor incorporate **feedback and iteration** into their development process?

# 6. Capacity to Perform the Project to Company’s Standards (10%)

**Key Aspects to Evaluate:**

* Sufficient **staffing levels and resource availability**.
* Clear **organizational structure** to support project success.
* Ability to handle **long-term support and maintenance**.
* **Financial stability** and reliability.

**Scoring Guidelines:**

|  |  |
| --- | --- |
| Score | Evaluation Criteria |
| 5 - Excellent | Well-resourced, financially stable, and structured for long-term success. |
| 4 - Good | Adequate capacity but may require additional resources in certain areas. |
| 3 - Average | Meets basic requirements but has potential constraints in resources. |
| 2 - Below Average | Limited capacity or concerns about vendor stability. |
| 1 - Poor | Vendor lacks the necessary resources to execute the project. |

**6. Capacity to Perform the Project to Company’s Standards (10%)**

**Key Questions:**

* **Organizational Strength & Resources:**
	+ What resources (e.g., staffing, tools, infrastructure) does the vendor have to support the successful execution of this project?
	+ What proportion of the vendor’s team will be **dedicated to this project**, and do they have the capacity to take on additional work if needed?
* **Long-Term Support & Maintenance:**
	+ How does the vendor handle **post-implementation support**, troubleshooting, and updates?
	+ What type of **customer support and training** will the vendor provide to Company’s staff?
* **Business Stability & Reliability:**
	+ How long has the vendor been in business, and what is their track record of **successfully delivering projects of this scale**?

# 7. References (5%)

**Key Aspects to Evaluate:**

* **Quality of references** and relevance to Company’s needs.
* **Client satisfaction and performance history**.
* Vendor’s **ability to maintain strong relationships** with previous clients.

**Scoring Guidelines:**

|  |  |
| --- | --- |
| Score | Evaluation Criteria |
| 5 - Excellent | References highly recommend vendor, citing strong performance and successful outcomes. |
| 4 - Good | Mostly positive references with minor concerns. |
| 3 - Average | References confirm vendor’s competence but lack enthusiasm. |
| 2 - Below Average | References indicate mixed experiences. |
| 1 - Poor | No references provided or references are negative. |

**Key Questions:**

* **Relevance & Similarity:**
	+ Can the vendor provide at least **two references from organizations with similar needs**?
	+ Do references highlight projects that are **comparable in scope and complexity** to Company’s needs?
* **Client Satisfaction & Performance:**
	+ What feedback do past clients provide regarding the vendor’s **reliability, communication, and ability to meet expectations**?
	+ Have past clients encountered **issues or delays**, and if so, how were they handled?
* **Post-Project Relationships:**
	+ How long do the vendor’s **client relationships typically last**?
	+ Does the vendor continue to provide **ongoing support, updates, and improvements** to past clients?

**Final Weighted Scoring Matrix**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Evaluation Area | Weight (%) | Vendor 1 | Vendor 2 | Vendor 3 |
| Qualifications and Experience | 20% |  |  |  |
| Technical Expertise | 20% |  |  |  |
| Cost Assessment Approach | 15% |  |  |  |
| Ability to Adhere to Timeline | 15% |  |  |  |
| Understanding Company’s Needs | 15% |  |  |  |
| Capacity to Perform | 10% |  |  |  |
| References | 5% |  |  |  |
| Total Score | **100%** |  |  |  |

This comprehensive evaluation framework ensures a **transparent, mission-aligned, and data-driven selection process**.