Evaluation Process for Invitation for Bids

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Crystal Korpan
Budget and Procurement Coordinator for Gilbert Public Schools
What can you expect from this presentation?

- What should you do BEFORE you release your IFB?
- What can be included in your evaluation criteria?
- What are some best practices followed in the evaluation process?
- What are the various ways you can award your bid?
- What information can be included in your award recommendation?
Plan

So you have discovered a need to issue an Invitation for Bid. Now What???

- What are your objectives?
- What are your expected results?
- Are you seeking a solution?
Plan

Developing your scope of work/specification and evaluation criteria should be an extension of your objective and should align directly with the results and expectations you wish to obtain!

- If this is a repeat solicitation, do not assume the scope of work/specifications, criteria and/or the priorities are the same!
- Talk to your end users – what are they looking for?

Our job in purchasing is to provide a means of finding the best fit for our end users while remaining fair and compliant with rules and regulations.
Evaluation Criteria

Some common examples of bid evaluation criteria include: conformity with specifications, support available from Bidder representative, reliability of Bidder, satisfaction of Bidder’s previous service, time for delivery, proximity to district and adherence in providing information as requested in this Invitation for Bid.
1. Firm and User’s Information
   Company Name
   Length of time your company has been in business under its current name
   Length of time your company has been doing business in Arizona
   Toll Free Phone Number
   Contact Person

2. Please indicate that your Offer complies with all terms, conditions and specifications as stated within this Solicitation:
   Yes ________ No ________
   If your answer is no, please explain:
   ____________________________
   ____________________________
   ____________________________

3. Please indicate the average number of days for delivery once a purchase order is received.
   ________________________ days

4. The District is currently participating in a Procurement Card program to both improve and expedite the purchasing and payment process.
   Will you allow contracted items to be purchased via a Purchasing Card? □ Yes □ No
Evaluation Criteria

Performance Evaluation Survey

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**PEORIA UNIFIED SCHOOL DISTRICT NO. 11**

**BID # 34-603-45-02 Athletic Equipment & Supplies**

**ATTACHMENT 2 – Performance Evaluation Survey**

Top portion is to be completed by the Bidder. Bottom portion is to be completed by the past or present clients.

TO THE ATTENTION OF:

NAME OF CLIENT’S COMPANY:

PHONE:

COMPANY BEING SURVEYED:

SUBJECT: Invitation for Bid # 34-603-45-02 for Athletic Equipment & Supplies

To Whom It May Concern:

Peoria Unified School District has implemented a process that collects information on Bidders. The information will be used to assist the District in the evaluation to determine responsive and responsible procurement of the above firms.

The company listed above has chosen to participate in this program. They have listed you as a past and/or present client that they have provided product/services for. Both the company and Peoria Unified School District would greatly appreciate you taking a few minutes out of your busy day to complete the accompanying questionnaire.

Please evaluate the Performance of the vendor (10 means- you are Always Satisfied and have no question about hiring them again, 5 means- you are Sometimes Satisfied, and 1 means- you are Very Dissatisfied and would never hire them again because of very poor performance). If you do not have sufficient knowledge of past performance in a particular area, leave it blank.

<table>
<thead>
<tr>
<th>No.</th>
<th>Criteria</th>
<th>Unit</th>
<th>Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Ability to deliver per expectations</td>
<td>(1-10)</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Quality of services/products</td>
<td>(1-10)</td>
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<tr>
<td>3</td>
<td>Ability to interact with District staff members</td>
<td>(1-10)</td>
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<tr>
<td>4</td>
<td>Close out process (invoicing, no unexpected fees)</td>
<td>(1-10)</td>
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<tr>
<td>5</td>
<td>Ability to follow the user’s rules, regulations, and requirements</td>
<td>(1-10)</td>
<td></td>
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<tr>
<td>6</td>
<td>Overall customer satisfaction based on performance (comfort level in using Offeror again)</td>
<td>(1-10)</td>
<td></td>
</tr>
</tbody>
</table>

Thank you for your time and effort in assisting the vendor in this important endeavor. Please fax this questionnaire to Peoria Unified School District at (823) 486-6297 by June 10, 2013 at 2:00 pm.

Signature

Date

Printed Name

Title
R7-2-1029(B) Receipt, Opening and Recording of Bids

Bids and modifications shall be opened publicly at the date, time and place designated in the IFB and in the presence of one or more witnesses. The name of each bidder, the amount of each bid, and other relevant information deemed appropriate by the school district shall be recorded. The record shall be available for public inspection.
## Evaluation Criteria

This is a sample of a tabulation sheet that we use at Peoria.

<table>
<thead>
<tr>
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<tr>
<td>1</td>
<td>Catalog Discount Percentage</td>
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<td>2</td>
<td>Ball Bag, Nylon Mesh, 24” x 36”, White</td>
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<td>Ball Cart, Volleyball, 25”L x 25”W x 40”H, Tachikara or Equal</td>
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<tr>
<td>4</td>
<td>Baseball, Leather Cover, Official, Diamond, D1-NFHS</td>
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<tr>
<td>5</td>
<td>Basketball Net, Nylon, Anti-Whip, Competition and Game Use, Champion 409 or Equal</td>
<td></td>
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<td></td>
<td></td>
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<tr>
<td>6</td>
<td>Basketball, Indoor, Microfiber Composite, Intermediate Size 28.5”, Spalding TF-1000 or Equal</td>
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<td></td>
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<tr>
<td>7</td>
<td>Basketball, Indoor/Outdoor, Rubber, Official Size 29.5”, Baden BR400 or Equal</td>
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</tr>
<tr>
<td>8</td>
<td>Basketball, Rubber, Intermediate Size 28.5”, Baden BR415 or Equal</td>
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<tr>
<td>9</td>
<td>Fielder’s Glove, 12.5”, Fits Left Hand, MacGregor BBMESHXX</td>
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</tbody>
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Evaluation Instructions

• Unless you repeatedly have the same evaluators on your evaluation committees, always assume your evaluators have no experience with procurement.

• Do a thorough job of preparing so that your committee members have everything they need when they sit down to evaluate the offers.

• Provide committee members with information regarding the bid process.

• Explain the expectations, i.e., importance of confidentiality, conflict of interest, the general evaluation process, etc.

• Provide examples or detailed explanations of what the committee members should be doing.

• Always thank your committee members for playing a valuable role in the critical decision about to be made.
Evaluation Instructions

Best Practices – Evaluation Committee Members Statement

- Provides clear, concise direction that each member must certify they understand conflict of interest statutory responsibility and confidentiality.
R7-2-1031(A)
Bid Evaluation and Award

The contract shall be awarded to the lowest responsible and responsive bidder whose bid conforms in all material respects to the requirements and evaluation criteria set forth in the invitation for bids.
Bid Evaluation and Award

A product acceptability evaluation shall be conducted solely to determine whether a bidder’s product is acceptable as set forth in the invitation for bids and not whether one bidder’s product is superior to another bidder’s product. Any bidder’s offering that does not meet the acceptability requirements shall be rejected as nonresponsive.
Bid Evaluation and Award

Bids shall be evaluated to determine which bidder offers the lowest cost to the school district in accordance with the evaluation criteria set forth in the invitation for bids. Only objectively measurable criteria that are set forth in the invitation for bids shall be applied in determining the lowest bidder. Examples of such criteria include, but are not limited to, transportation cost, energy cost, ownership cost and other identifiable costs or life cycle cost formulae.
A contract may not be awarded to a bidder submitting a higher quality item than that designated in the IFB unless the bidder is also the lowest bidder.
R7-2-1031(H)
Bid Evaluation and Award

If there are two or more low responsive bids from responsible bidders that are identical in price and that meet all the requirements and criteria set forth in the IFB, award may be made by drawing lots.
R7-2-1031(I)
Bid Evaluation and Award

- A record showing the basis for determining the successful bidder shall be retained in the official records of the school district.
Spreadsheet Format

- When putting together your evaluation spreadsheet, consider what information you want to capture.
- Will you have a need to sort or manipulate the data.
Evaluation Tabulation/Spreadsheets

• Provide the evaluator with a tabulation/spreadsheet of the offers being evaluated.
• Reiterate expectations: award shall be made to the lowest responsive, responsible offeror.
• Direct them to their resources and show them how to use them.
• The more prep-work you do, the less confusion your committee member will have!
<table>
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<tbody>
<tr>
<td></td>
<td>Catalog Discount Percentage</td>
<td>No Bid</td>
<td>10%</td>
<td>15%</td>
<td>15% - 40%</td>
<td>25%</td>
<td>0%</td>
<td>5%</td>
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<td>5.06</td>
<td>1.90</td>
<td>No Bid</td>
<td>3.44</td>
<td>2.98</td>
<td>3.00</td>
<td>No Bid</td>
<td>4.25</td>
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<td>101.60</td>
<td>50.40</td>
<td>99.99</td>
<td>93.72</td>
<td>64.49</td>
<td>95.00</td>
<td>No Bid</td>
<td>110.00</td>
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<tr>
<td>3</td>
<td>Baseball, Leather Cover, Official, Diamond, D1-NFHS</td>
<td>63.24</td>
<td>55.08</td>
<td>34.99</td>
<td>44.41</td>
<td>46.88</td>
<td>44.00</td>
<td>No Bid</td>
<td>46.00</td>
</tr>
<tr>
<td>4</td>
<td>Basketball Net, Nylon, Anti-Whip, Competition and Game Use, Champion 409 or Equal</td>
<td>4.35</td>
<td>1.74</td>
<td>No Bid</td>
<td>1.74</td>
<td>1.95</td>
<td>4.75</td>
<td>No Bid</td>
<td>1.99</td>
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<td>5</td>
<td>Basketball, Indoor, Microfiber Composite, Intermediate Size 28.5”, Spalding TF-1000 or Equal</td>
<td>35.00</td>
<td>13.80</td>
<td>24.99</td>
<td>35.53</td>
<td>35.75</td>
<td>39.99</td>
<td>No Bid</td>
<td>19.95</td>
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<tr>
<td>6</td>
<td>Basketball, Indoor/Outdoor, Rubber, Official Size 29.5”, Baden BR400 or Equal</td>
<td>5.50</td>
<td>4.39</td>
<td>3.49</td>
<td>5.64</td>
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<td>No Bid</td>
<td>7.20</td>
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<td>7</td>
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<td>5.50</td>
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<td>3.39</td>
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<td>No Bid</td>
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<td>8</td>
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<td>24.45</td>
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<td>19.93</td>
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<td>18.00</td>
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</table>
Best Practices – Executive Summary and Recommendation to the Governing Board:

• Should spell out the details of the solicitation, including dates, number and type of responses, evaluation committee process and tabulations, resulting recommended vendor for contract award, contract type and estimated expenditures.
Summary

- What should you do BEFORE you release your IFB?
- What can be included in your evaluation criteria?
- What are some best practices followed in the evaluation process?
- What are the various ways you can award your bid?
- What information can be included in your award recommendation?
Questions?
Contact Info

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