

## **EVALUATION PROCESS CHECKLIST**

Procurement No. \_\_\_\_\_ Bid No. \_\_\_\_\_

Any evaluation where an item is not checked and not marked **n/a** (not applicable) should be reviewed to determine what needs to be done to ensure a fair and impartial evaluation.

### **Preparation**

#### **Selection of evaluators**

- Select three or more evaluators who may be from staff, outsiders and/or the PIC.
- All evaluators have knowledge of the Company and the items or services being bid.
- Evaluators do not include the bid contract manager (to avoid any suggestion of unfair selection although the officer should assist the review panel).
- Evaluators have signed the **CONFLICT OF INTEREST/NON-DISCLOSURE STATEMENT**.
- Each individual or group involved in proposal evaluation has been given written details on their roles and responsibilities.
- Each evaluator has been trained in using the evaluation forms indicated below:  
(Check those appropriate to this evaluation. All forms are at Y:/jtpa/procurement/forms)
  - BUDGET LINE-ITEM CHECKLIST**
  - EVALUATION RATING WORKSHEET** (Developed for each procurement).
  - HIGH-RISK RECIPIENT CHECKLIST**
  - INDIVIDUAL REFERRAL WORKSHEET**
  - NON-MONETARY CRITERIA--STRENGTH/CONCERN WORKSHEET**
  - PRICE ANALYSIS WORKSHEET – GOODS** or **PRICE ANALYSIS WORKSHEET - SERVICES**.
  - PROFIT WORKSHEET**.
  - COST ANALYSIS CHECKLISTS**.
  - COST ANALYSIS WORKSHEETS**.

### **Evaluation**

- Competitive range set as \_\_\_\_\_ of the top scores or all scores above \_\_\_\_\_.
- COST ANALYSIS CHECKLIST** with **COST ANALYSIS WORKSHEET** and/or the appropriate **PRICE ANALYSIS WORKSHEET** for each proposal, dependent on proposal type.
- NON-MONETARY CRITERIA--STRENGTH/CONCERN WORKSHEET** completed for each proposal, if appropriate.

**Post-Evaluation**

- Any questions asked of bidders are documented with who was asked and why.

If proposal items are negotiated:

- Letter sent to bidders stating the deficiencies and the documentation needed for the negotiation meeting and/or contract finalization.
- The following documentation:
  - Which bidders were and were not the subject of negotiations and why.
  - What was negotiated.
  - The results of those negotiations.

For all training programs:

- Evaluators considered community-based organizations, including community recognized women's organizations with knowledge about or experience in nontraditional training for women.
- The above statement was checked with the following documentation:
  - Organization names,
  - Whether they were selected as the service provider, and
  - If not, the reason for non-selection.
- The above statement was NOT checked with the following documentation:
  - Why none were considered.
- After selection of bidder(s), written summary prepared explaining the rationale behind the selection(s).