

1. Using the **SPECIFYING DELIVERABLES CHECKLIST**, prepare a list of the major elements to be evaluated, i.e. features, warranties, required training modules, experience, price, etc. These must be the same elements as in the RFP/RFQ/IFB. **Price must** be an element and should be the last element entry.
2. Rank the elements by importance.
3. Using percentages, determine what portion each element will represent.

Each element is "x" percent of a 100%, i.e. features is 50%, warranties 20%, etc.

4. Break each element into its sub-elements, i.e. required features such as duplex printing, color, reduction and magnification, feeder tray, etc. For the **Price** element, sub-elements must include price of the good or service **plus** rows for price of any warranty (regular and extended), service agreements, shipping, training, installation, and supplies.
5. Using the percent assigned the major element, divide this percent among the sub-elements.

Example:

- a. Features is 50% of the 100%.
- b. Features has five sub-elements.
- c. Assign each sub-element part of this 50% based on importance, i.e. if duplex printing is more important than color assign duplex 20% and color 15%.
- d. Total sub-element percent must total major element percent.

6. Sub-elements are evaluated based on this criteria:

Excellent 100%, Very Good 80%, Good 60%, Fair 40%, Poor 20%, None 0%  
(None means the evaluated product or service does not have that sub-element.)

Using the sub-element duplex printing, if the equipment's ability was rated as Good (60%), the sub-element duplex printing (20%) would receive 12 percent of the possible 20 percent (20% x 60%).

7. Prepare a rating spreadsheet as illustrated on the next page.

**EVALUATION RATING WORKSHEET**

<b>PROCUREMENT 12345 MULTI-FUNCTION PRINTER</b>							
Rating Criteria: Excellent 100%, Very Good 80%, Good 60%, Fair 40%, Poor 20%, None 0%							
<b>Elements</b>	<b>%</b>	<b>Company A</b>		<b>Company B</b>		<b>Company C</b>	
		<b>Rating</b>	<b>Value</b>	<b>Rating</b>	<b>Value</b>	<b>Rating</b>	<b>Value</b>
Features	50%						
Duplex	20%	V	16%				
Color	15%						
Feeder tray	8%						
Magnification	5%						
.pdf convert	2%						
Other Elements							
Total							
Extras							
Comments							
Pre-Bid Estimate							
Evaluator Name							
Evaluator Signature							

8. Enter the letter rating for each feature then the score.

Example: Sub-element Duplex is 20%.

Evaluator enters V (Very Good 80%) and 16% (20% x 80%)

9. Total percentages determine bidder's rank. (Use the  $\Sigma$  icon to sum the column.)

10. At the bottom of the columns, enter a row for Extras offered by the bidder. Format the cells on this row to word wrap. Extras are not given points but are used to choose between vendors with similar scores.

11. Under the "Extras" lines, enter a row for Comments. Format the cells on this row to word wrap.

12. Across the bottom of the form, enter a row titled **Pre-Bid Estimate** and enter the estimate. The next row is titled **Evaluator Name (Print)** and the third row is titled **Evaluator Signature** for the requisite evaluator information.