

Skating on Thin Ice:

Common Mistakes in Public Procurement Evaluation Processes

PRESENTED BY: Doreen Wong, Robinson Global Management



WIN – Best Practices

WIN – Best Value for Money












WIN – Public & Bidder Confidence



FAIR

OPEN

TRANSPARENT

MISTAKE #1	<h3>Not Picking the Low-Hanging Fruit</h3>	 <p>Perfect and follow your own procurement policies and procedures</p>	 <p>Verify formulas and pricing instructions on existing templates for consistency</p>	 <p>Double-check that the math works with the formulas</p>
MISTAKE #2	<h3>Lack of Transparency</h3>	 <p>Make the evaluation approach and methodology clear in the RFP</p>	 <p>Disclose weighting, sub-weighting, and a clear scoring scale</p>	 <p>Disclose all evaluation criteria</p>
MISTAKE #3	<h3>Not Setting Up the Evaluation Process for Success</h3>	 <p>Create realistic timelines for individual and consensus evaluation</p>	 <p>Determine and manage any biases that might affect evaluation</p>	 <p>Review the qualifications and make-up of the evaluation team, with clear roles, responsibilities, and expectations, then give them proper evaluation training</p>
MISTAKE #4	<h3>Not Using Proper Consensus Method in Evaluation</h3>	 <p>Consensus IS NOT a straight average of a group of individual scores (or of individual scores within a range) and keeping of individual comments</p>		 <p>Consensus IS a discussion of individual scores, the outcome of which is a single consensus score and a supporting consensus comment(s)</p>

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MISTAKE #5

Mishandling of the Three C's

Confidentiality
Communication
Conflict of Interest



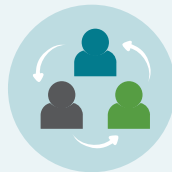
Confidentiality

- Make sure everyone understands what's allowed and not allowed
- Ensure confidentiality of proposals, evaluation documents and process, including evaluation discussions



Communication

- Appropriate protocols in the evaluation process should outline who is the "go to" for questions, how day-to-day dealings with existing vendors should proceed, what level of discussion is allowed between evaluators, and communication with vendors about their proposals
- Ensure that requested bidder clarifications do not open the door to bid repair



Conflict of Interest (COI)

- Evaluators should be clear about what situations require disclosure of a conflict
- **Actual COI:** Where given your personal or private interest(s), you are in a position to be influenced
- **Potential COI:** Where your personal or private interests are not, but could come into direct conflict with your official duties and responsibilities in the future
- **Perceived COI:** Where it appears or could be perceived that your personal or private interests are improperly influencing the performance of your official duties, whether or not that is actually the case

Your decisions

Your duties and responsibilities

Your past or current activities

Your personal Interests

Your business interests or commercial relationships

Tips in Declaring, Assessing, and Handling COIs

Internal

- Not just "me, myself and I" – consider friends, family, and other connections
- Not just financial, not just gain
- Not just a one-timer
- Silence is not golden!

External

- Bidders should carefully review and understand COI declarations
- Agencies should carefully assess bidder declared conflicts
- Involve your fairness monitor and/or legal counsel when necessary