



INSTRUCTIONS FOR PROPOSAL EVALUATORS

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GENERAL INFORMATION

Conflict of Interest Disqualification:

Members of the technical evaluation scoring group should be free of any appearance of a conflict of interest. If, after reviewing the list of bidders, you find that you have a vested personal or financial interest with any of them, then you should immediately notify the ARTI project manager at 703/524-8800 and explain the nature of your conflict of interest. A determination will then be made whether the apparent conflict warrants disqualification. Project Advisory Committee (PAC) members participating in the contractor selection process, and in site visits to the contractor, shall adhere to following code-of-conduct:

No participant shall participate in the selection, award, or administration of a contract if a real or apparent conflict of interest would be involved. Such a conflict would arise when the participant, any member of his or her immediate family, his or her partner, or an organization which employs or is about to employ any of the parties indicated herein, has a financial or other interest in the firm selected for an award. Participants shall neither solicit nor accept gratuities, favors, or anything of monetary value from contractors being considered for proposed research or from contractors currently under contract to ARTI.

Confidentiality of Proposals and Scoring Criteria/Sheets:

Contents of proposals and scoring sheets should be held in the strictest of confidence and not disclosed to anyone outside the Project Advisory Committee.

Project Advisory Committee members are responsible for safeguarding proposals and scoring sheets from unauthorized disclosure. Only the titles of the evaluation categories have been released to bidders. Specific guidance for point ranges, scoring criteria, resultant scores, and comments will not be disclosed to bidders.

All scoring sheets and individual comments contained thereon will be held in the strictest of confidence. They will not be released to the public or to any of the bidders. However, appropriate ARTI *Research Program* sponsors, upon written request, may review and audit the score sheets at ARTI's offices.

All copies of proposals and scoring packages are to be returned to ARTI. Project Advisory Committee members are also to forward to ARTI, or destroy, all draft notes and comments at the conclusion of the selection process.



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Announcement, Identification of Successful Contractor, Debriefing of Unsuccessful Contractors

ARTI staff will make all public and private notifications of selection results. Identification of the recommended contractor, and notification of same, shall be kept confidential until announced by ARTI (generally, after a contract has been executed with the successful bidder).

ARTI staff will, upon request, “debrief” those entities that were not selected for the project award. Debriefings, when requested, are conducted in a constructive manner with an aim of assisting bidder(s) to understand what elements need to be addressed in future submissions that may result in improved chances of success. During the debriefings, attribution of specific Project Advisory Committee members’ comments and confidential information from other bidder(s) will not be disclosed. However, the compiled comments from the project reviewers may be used when describing the bidder’s perceived strengths or weaknesses.

Contact with Bidders during the Evaluation Process:

Project Advisory Committee members are not to publicly or privately announce their status as a scoring subgroup member to any bidder prior to the award selection announcement by ARTI.

During the selection period, Project Advisory Committee members should have no direct contact with a bidder concerning his or her proposal. Any attempted contact by a bidder to discuss the request for proposals (RFP) or his proposal, should be immediately referred to the ARTI project manager.

SCORING INSTRUCTIONS

Each proposal will be scored in five separate areas:

1. Understanding the problem
2. Approach to solving the problem
3. Probability of success
4. Qualifications and experience of key personnel
5. Quality of facilities to perform the work

Suggested sequence for evaluating proposals:

First, read through the scoring criteria to become familiar with each evaluation category and its scoring criteria. Next, read through each technical proposal to gain a general overview of each proposal and to form a basis for comparison and analysis. Then, reexamine each proposal and score them, one at a time using the scoring criteria as a guide, against the work statement requirements.



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After you have initially scored each proposal, review your scores, make any final adjustments, and record your scores and comments on the score sheet.

NOTE: Your scoring should be based solely on the contents of the proposal as submitted. If a key item in the proposal requires clarification, contact the ARTI project manager. Individual Project Advisory Committee members are prohibited from directly contacting any bidder about the proposal(s) during the evaluation process. If it is necessary to meet with a bidder to clarify something in his or her proposal, then the ARTI project manager will coordinate a meeting for all scoring members to attend.

Filling in the scoring package:

Use a separate scoring package for each proposal. Assign points from 0 to 100 for each evaluated category. The scoring criteria provide broad guidance for assigning points from a range of points based on the stated criteria. You have considerable leeway in assigning points from within these ranges. To make corrections, simply line through the error with a single line, write the correction, and initial each correction.

Also, provide a short narrative explaining your reasoning for assigning points to each evaluated category. Use the back of the page or plain bond paper if additional space is required. These narrative comments are very valuable and some thought needs to go into them.

Finally, sign and date each page including any added pages.