

# GETTING TO WHY: AN ALTERNATIVE TO NUMERIC SCORING

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Presented by:

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Tuesday, August 21<sup>st</sup> at 2:45 pm



# Objectives



- Learn a qualitative alternative to numeric scoring
- Learn calibrate and/or prioritize criteria to achieve results consistent with the goals
- Simplify the evaluation process while gathering highlights that support the selection

# Survey Question #1

After conducting the evaluation process, the highest score was not the best firm for the project. Has this happened at least once in your agency?

**Yes**

**No**



# Possible Reasons

- Calibration
- Criteria not balanced
- All criteria weight the same
- Confusion between criteria and submittal requirements
- Standard criteria not customized for the project
- Inconsistent scoring



# Survey Questions

- How many of you weight criteria?

Yes



- How many of you have standard criteria?

Yes



# Project Criteria vis-à-vis Standard Criteria

- Not all criteria are equal
- When to Standardize Criteria
- Criteria should be customized to the project



# Classifying Criteria

- What would make or break the project?
- What offering aligns best and presents the best case scenario for the project
- What is a standard requirement?
- Price for shortlisted only



# Exercise

- The RFP solicitation is for consulting services to conduct a disparity study. The study requires expertise in statistical analysis and experience in this type of study.
- Classify the criteria and group them based on what you believe is essential to the success of the project.





<b>Criteria</b>	<b>Importance Level</b>
Qualifications of the firm and relevancy of experience to successfully conduct the study.	
Financial capacity to perform the services to completion	
Specialized experience of key personnel and relevancy to the requirements of the project.	
Action plan and approach for project implementation.	
Compliance with insurance requirements.	
Reasonableness of price proposal.	

# Rating Guidelines

Rating	Qualitative Comment
Excellent	Outstanding qualities
Good	Positive with minor exceptions
Fair	Unclear
Poor	Substandard



# Overall Evaluation

Criteria by Level of Importance	Acceptable Rating
Critical	Excellent or Good
Important	Excellent to Fair
Requirement	Compliant



# Getting to the Shortlist

Overall Ranking	Critical	Important	Required
Highly Qualified	E & G	$\geq G$	$\geq G$
Qualified	G	$\geq F$	$\geq F$
Not Qualified	$\leq F$	$\leq F$	$\leq F$



# Overall Evaluation

Criteria	Weight	P1	P2	P3
Qualifications & Exp. of Firm	C	E	G	G
Specialized Exp. of Key Personnel	C	G	F	G
Understanding and Approach	I	G	E	G
Financial Capacity	I	G	G	G
Compliance with Ins Require.	R	G	G	F
Submission of ownership disclosure	R	G	F	G
		HQ	NQ	Q

# How to Achieve Qualitative Evaluation Goals

- Consistency
- Get to the Why
- Consensus



# Adopt Written Guidelines

- Roles
- Process
- Protocols
- Evaluation Summary



# Questions



# Thank you

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