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November 1, 2008

To: Supervisor Yvonne Burke, Chair
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From: William T Fujioka
Chief Executive Officer

Tom Tindall, Director
Internal Services Department

USE OF CONSENSUS SCORING FOR REQUEST FOR PROPOSALS (RFP) EVALUATIONS

The Internal Services Department (ISD) publishes the County's Services Contracting Manual, which provides contracting guidelines to departments for issuing and evaluating RFPs for contracted services. The manual describes two methods for evaluating and scoring proposals, averaging and consensus. The averaging method has evaluators independently score the proposals. The scores are mathematically averaged. The proposal with the highest score is recommended for award. The second method for evaluating RFP's, as described below, is through consensus by an evaluation team.

Overview

ISD and many other State and local jurisdictions across the country have found that a consensus rating arrived at after consideration and discussion of all information provided by the vendor represents a more accurate assessment of the vendor's offering than does a mathematical averaging of individual evaluators' scores. Whereas averaging scores disregards deviations between individual raters, consensus scoring is a fair and equitable method that minimizes subjectivity in scoring by having an evaluation team take part, as a group, in the decision-making process. This would be akin to a jury deliberation to render a consensus verdict.

In agencies such as the States of Mississippi, Oregon, Virginia and Montana, Maricopa County, Fairfax County, and the city of Seattle, consensus scoring is not only recognized as a "best practice" in the RFP evaluation process, but is documented in purchasing and contracting policy. Although some of these policies are silent as to the disposition of individual rater materials, others are explicit in stating that the draft materials and worksheets are collected and destroyed. As described further herein, the County has a

standard practice of discarding individual rater's notes, comments and worksheets once a consensus has been reached.

Methodology

The consensus scoring method has each evaluator independently read and score the assigned proposals prior to the evaluation team meeting(s) which is designed to allow the team to arrive at a consensus. This process affords each evaluator the opportunity to independently analyze each proposal, annotate notes relating to proposed scoring, observations, strengths and weaknesses, and questions regarding a vendor's proposal.

After this initial individual review, a designated chairperson convenes one or more evaluation team meeting(s) to discuss the proposals and reach a consensus score for each proposal. The consensus is reached through discussion and debate that allows each evaluator to inform the team of the rationale for his or her individual scores. This discussion may provide additional insight into a vendor's offering and/or correct misperceptions of individual evaluators. Once a consensus is reached, the results are documented with supporting comments. This document becomes the formal evaluation results representing the recommendation of the evaluation team at which time the individual team member notes and worksheets are collected and discarded. These documents are considered "draft" work product designed solely to prepare for the evaluation team meeting(s) to debate and reach a consensus.

In stark contrast to the previously referenced method of averaging scores where the individual scores would be maintained to support and justify the final score, the consensus score is based on the determination that once a consensus is reached and is documented, the individual scores are no longer valid (i.e., they reflected an individual rater's read of the respective proposal). To this end, after the evaluation committee has met, debated, and reached a consensus and the consensus is recorded, the individual's read of the proposal is no longer a relevant factor, rather the consensus score is the official recommendation.

Summary

For the above stated reasons, ISD uses the consensus scoring methodology, exclusively; considers it an industry-wide "best practice" and recommends that it be utilized as the County's standard methodology for evaluating proposals submitted in response to RFPs.

Please let me know if you have any additional questions, or your staff may contact Ellen Sandt of this Office at (213) 974-1186 or Joe Sandoval of the Internal Services Department at (323) 267-2670.

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TT:JS:ef