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## EVALUATION COMMITTEE GUIDELINES & CONFLICT OF INTEREST / NON-DISCLOSURE AGREEMENT REQUEST FOR PROPOSALS (RFP) AND REQUEST FOR QUALIFICATIONS (RFQ)

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### RFP/RFQ Evaluation Committee Objective

The Committee first reviews all relevant information (i.e. department needs, specifications, scope of work) and develops weighted criteria to establish the requirements by which a respondent meets the needs of the RFP/RFQ. Establishing the criteria is a critical task since this will be the standard by which all responses will be evaluated. The Committee must agree on a scoring method and then apply it impartially to each proposal or statement of qualifications received.

### Committee Member Roles

- Clarify committee members' roles and establish a time line that includes important deadlines. The committee must review the solicitation documents (RFPs/RFQs) to familiarize themselves with the requirements and criteria.
- Establish a committee chair (i.e. lead technical contact of the RFP/RFQ). The chair is responsible for keeping evaluation activities on schedule and attending potential debriefings with the Purchasing representative after award.
- All vendor contact should be through Purchasing during the RFP process. If a vendor contacts a committee member, the vendor should be referred to Purchasing. Committee members must not communicate with vendors as this could potentially jeopardize the award of the RFP/RFQ.
- The Purchasing representative is generally a non-voting facilitator of the meeting ensuring that the committee activities are in accordance with the law, County policy and applicable guidelines. Additional functions of the Purchasing representative include ensuring integrity of the procurement process, compliance with RFP/RFQ requirements, scheduling respondent interviews, retaining documentation, corresponding with respondents, negotiation of the contract, and placement of award recommendation on Commissioners Court agenda.

### Committee Tasks

1. Sign a **Conflict of Interest and Non-Disclosure Statement**.
2. Analyze requirements and develop evaluation criteria prior to the release of an RFP/RFQ.
3. Attend each scheduled meeting, including oral presentations unless unique circumstances prevent member from attending.
4. Perform functions in a fair and equitable manner.
5. Communicate items in question to the Purchasing representative who will then email the appropriate respondent. Responses will be shared and discussed with the committee members.
6. Review each of the proposals and be prepared to discuss each proposal when the Evaluation Committee meets.
7. Evaluate, analyze and score proposals or qualifications against established criteria.
8. Determine whether presentations/interviews should be held with (a) short-listed firm(s) or individual(s).
9. Develop questions or additional criteria for oral interviews/presentations.
10. Identify finalist(s) for Purchasing to negotiate or invite Best and Final Offer.
11. Provide technical input and expertise during any negotiation.
12. Provide recommendation of a selected firm to the Commissioners Court for final approval while following County policies and applicable laws. Be prepared to answer questions and support the recommendation if requested.

### Composition of Evaluation Committee

The evaluation committee should be comprised of (at least) one non-voting member from the Purchasing Department and **3-5 voting members** such as end-users with technical expertise, stakeholders who will be users of the item or service being procured and in addition, a representative from departments other than the requesting department, or outside of Williamson County.