**How to Prepare an Evaluation Criteria for a Solicitation**

1. Purpose:

This procedure is issued to provide University departments with guidance when preparing an evaluation criteria for a solicitation. In order to achieve the desired result of a major purchase, it is important to have chosen beforehand a set of criteria used to score and evaluate respondent proposals/bids. The solicitation must identify the evaluation criteria and the relative weight assigned to each criterion. If the evaluation criteria and associated weights are not thoughtfully designed, then the procurement will fail because the basis of the award will not correctly identify the response that offers best value to the University.

1. Definitions:
2. Criteria - A principle or standard by which something may be measured, judged or decided upon in association with weight.
3. Scope of work - The Scope of Work (SOW) is the area in an agreement where the work to be performed is described. The SOW should contain any milestones, reports, deliverables, and end products that are expected to be provided by the performing party. The SOW should also contain a time line for all deliverables.
4. Respondent Experience – Experience working with University of Houston and/or Higher Education in relation to the scope of work.

1. Respondent Qualifications - A quality or accomplishment that makes someone suitable for a particular job or activity.
2. Financial Capability - For high-risk or high dollar procurements, it is best practice to require each respondent to provide evidence of financial capability to perform all the services required by the solicitation as well as all services offered in the response.
3. Cost and Delivery Proposal - Preliminary cost estimate submitted by a vendor for the purpose of negotiations or planning a job or project.
4. Best Value – Criteria + Cost = Best Value
5. Guidelines:

The evaluation criteria must reflect the essential qualities or performance requirements necessary to achieve the objectives of the contract. The weight assigned to each evaluation criterion must correlate to its importance. The PI/PM must ensure not only that the evaluation criteria and the associated weights are clearly stated, but also that information submitted in the response directly relates to the criteria. The PI/PM should be careful to ensure that the respondents and the evaluation committee have no opportunity to be confused about which portion of the response applies to each criterion.

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| Evaluation Criteria | Solicitation Requirement | Submission Requirement |
| Respondent Qualifications | Specified professional license or certification. | Copy of current license or certificate applicable to specified profession or trade. |
| Respondent Experience | Specified number of projects of similar size and scope. | Detailed information regarding project size, dollar amount and scope of project for each individual project and any additional information necessary to evaluate vendor experience. |
| Financial Capability | Financially capable of handling a project of this size and scope. | Copy of latest financial statements, including balance sheets, Dunn and Bradstreet report, etc. |

1. Procedures:
2. Fill out Formal Solicitation Requirement Form where you can select criteria and weight (link: <https://uh.edu/office-of-finance/purchasing/Forms/>)
3. Carefully planned criteria are important for effective evaluations. Developing good evaluation criteria will entail:

a) Understanding the program objectives

b) Understanding the effectiveness of the activities used by the company to reach the objectives

c) Understanding the efficiency of the company’s outputs

d) Understanding the impact of the company’s activities and finally

e) Understanding the sustainability of the business.

Example:

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| **Evaluation Criteria** | **Points Allowed** |
| **Criteria 1** - List purchase price. | 30% |
| **Criteria 2** - Reputation of the vendor and of the vendor’s goods or services. | 15% |
| **Criteria 3** - Quality of the vendor’s goods or services. | 15% |
| **Criteria 4** - Extent to which the goods or services meet UHS needs. | 20% |
| **Criteria 5** - Total long-term cost to UHS of acquiring vendor’s goods and services. | 10% |
| **Criteria 6** - Ability of the vendor’s proposal to meet the requirements of the institution’s solicitation document, so that any vendor proposal that is non-responsive to the criteria set forth in the solicitation document shall be rejected. | 10% |
| **TOTAL** | **100** |

\*Note: For best value cost should be a minimum of 30%.

1. Submit the Formal Solicitation Requirement Form to your department assigned buyer.

Helpful Links:

<https://uh.edu/office-of-finance/purchasing/>

<http://www.uh.edu/office-of-finance/purchasing/Forms/>

\*\*Note: If you have difficulty in determining a criteria reach out to your buyer for assistance or look at your department’s past project’s criteria for insights into new project’s criteria.