

Innovation Technique 7 — On-the-Spot Consensus Evaluation

On-the-Spot Consensus—

The evaluation team reads the proposal (or attends the oral presentation) and then, as a group, evaluates the proposal and immediately documents the evaluation decision in real time before starting the evaluation of the next proposal.

The evaluation team members do not separately document their individual positions (although they may have made notes while reading the proposal or attending the oral presentation).



Did You Know? The HSAM tells us that individual evaluator reports *are not needed!*

HSAM 3008.405-70 Evaluation Practices.

(a) When evaluating non-price factors in a competitive acquisition, and when the Government evaluation team includes more than one person, the team may collaboratively arrive at ratings or findings. ***It is not necessary for an evaluation team to first develop individual member evaluation ratings or findings before starting a consensus evaluation.***

Suggestions—

1. For written proposals, evaluators take informal notes while reading. For oral presentations (including video presentations, product demonstrations or technical challenges), individual evaluators take informal notes during the presentation.
2. Immediately afterwards, the evaluators assemble to decide on the consensus rating (if adjectival ratings are being assigned) and to document the rationale for the rating. This process is completed before the next evaluation begins.
3. It is important to plan your schedule to permit time to allow for on-the-spot consensus evaluations. For instance, if orals are being scheduled, leave sufficient time in-between each presentation for the consensus evaluation.
4. Document the decision, not the deliberations. Evaluate and arrive at consensus, and *then* document the rationale for the decision. See ***Working Backwards*** in this workbook's GAO Guide.
5. After evaluating the last proposal, it may make sense for the evaluation team to quickly review all of the proposals to ensure they used a common standard for all proposals. Some editing or normalizing of the consensus evaluation may occur during this review.
6. Prepare an evaluator worksheet to record notes and to help keep the evaluation on track.

7. A facilitator and a note-taker can be very helpful — the facilitator (maybe the contracting officer?) keeps the team focused on the task and the output — the note-taker (maybe the contract specialist?) takes the notes that will become bullets in the evaluation report.

Recommended Text for Evaluation Plan—

- *Evaluation factors supported by written proposals.* After individual evaluators review and make notes on the proposals, the evaluation team chair will assemble members to reach consensus on the ratings and findings for each proposal in accordance with the evaluation factors contained in the solicitation. The consensus evaluation report is the record of the evaluation.
- *Evaluation factors supported by oral presentation.* Immediately after each oral presentation, the evaluation team chair will assemble members to reach consensus on the ratings and findings for each proposal in accordance with the evaluation factors contained in the solicitation. The evaluators may make notes during the oral presentation. The consensus evaluation report is the record of the evaluation. The next oral presentation shall not start until the evaluation team has completed the evaluation of the most recent oral presentation.

SAMPLE 1

Sample consensus report template for acquisition with three technical factors (three factors covered by a single oral presentation, or three factors in a written proposal). This template was made in Word (.docx), and will scroll into multiple pages as bullets are added under each factor. After viewing the oral presentation (or reading the proposal), the evaluation team gathers in consensus to complete this document.

ON-THE-SPOT CONSENSUS EVALUATION REPORT TEMPLATE			
Offeror: _____			
Evaluation Factor	Adjectival Rating		
Factor 1: _____	L	S	H
Factor 2: _____	L	S	H
Factor 3: _____	L	S	H
Factor 1 Rationale			
Raises Expectation of Success:		Lowers Expectation of Success:	
<ul style="list-style-type: none"> 		<ul style="list-style-type: none"> 	
Other Observations <i>(if any)</i>			
<ul style="list-style-type: none"> 			
Factor 2 Rationale			
Raises Expectation of Success:		Lowers Expectation of Success:	
<ul style="list-style-type: none"> 		<ul style="list-style-type: none"> 	
Other Observations <i>(if any)</i>			
<ul style="list-style-type: none"> 			
Factor 3 Rationale			
Raises Expectation of Success:		Lowers Expectation of Success:	
<ul style="list-style-type: none"> 		<ul style="list-style-type: none"> 	
Other Observations <i>(if any)</i>			
<ul style="list-style-type: none"> 			
Date of Consensus: _____			
Evaluators: _____			
Source Selection Information <i>(when completed)</i> – See FAR 2.101 and 3.104			