

# FACILITATING DEMONSTRATIONS IN EVALUATION

Demonstrations are an optional part of the technical evaluation, and if required by the solicitation, they take place as the second scored phase of an evaluation prior to opening the sealed cost proposals.

The scoring from the technical proposals (first phase) determines which prospective contractors will move on to this second phase and be invited to provide a demonstration.

The evaluation facilitator, usually the buyer, is responsible for managing the demonstration process. This typically includes, but is not limited to:

- Creating the agenda for the demonstrations and providing this by email to the prospective contractors.
  - This should provide the key points the evaluators want the prospective contractor to cover in the demonstration as well as the time limits and general procedure that must be followed.
    - Often these key points are discussed and determined at the end of the consensus meeting when the scores are totaled and the prospective contractors who will be moving to the demonstration phase are determined.
- Scheduling each demonstration, which includes:
  - Determining the availability of the evaluators, which is typically done at the end of consensus.
  - Emailing the prospective contractor to advise of the scheduled date/time of the demonstration.
  - Scheduling the venue for the demonstration and arranging the area as needed for the demonstrations (tables, chairs, equipment, etc.)
    - Best practice is to have prospective contractors bring their own audio-visual equipment to the demonstration. State-provided equipment that could possibly cause technical difficulties with the demonstration can thereby be avoided.
- Creating the Pre-Demonstration Consensus Score Sheet.
  - This consists of entering the current technical scores from the consensus score sheet into the Pre-Demo Consensus Score Sheet and saving a copy for the procurement record.

- Assigning a procurement staff member to greet each prospective contractor upon arrival to the demonstration venue and address any questions that may arise as the demonstration presentation is set up/prepared. This staff member will also remain with the prospective contractor after the demonstration as the demonstration equipment is packed, and he/she will escort the prospective contractor out of the venue area/building.
  - When a solicitation requires demonstrations, additional procurement team members may be asked to assist the buyer with this task.
- Assigning a procurement staff member (typically the facilitator) to the evaluators to escort them to the demonstration venue for the presentation and afterward to a location where they can confidentially score the demonstration (by adjusting their individual scores for each evaluation criteria based on demonstration presentation).
  - The prospective contractor's demonstration team and the evaluators should not engage in conversation prior to or after the demonstration to ensure that each prospective contractor has an equal amount of time and opportunity to present.
  - Having a conversation other than "hello" or "goodbye" could jeopardize the integrity of the solicitation
- Entering the adjusted scores on the Post-Demonstration Consensus Score Sheet where the evaluators determine they want to make changes, then printing the score sheets for evaluator signatures.
  - The scoring adjustment is typically executed in real time so that the evaluators can confirm their final scores and sign the finalized score sheets when they are printed.