Demo Lessons Learned

You can have a great communication plan but it will fail if each person doesn’t commit to sharing the information they have.

Invite interested (non-collaborating) agencies to demos – at least one seat in the room to keep them informed

Don’t make the same groups always meet at the same time (finance/procurement in the afternoon).

At the post evaluation meeting talk about lessons learned – what was good about the RFP at this stage? What could be improved for next time?

Provide signs to rooms

Start at 8:15 and 1:15, end at 11:45 and 4:45

Specify break times (or at least that there will be at least one 15 minute break during each session)

If recording the sessions using GoToMeeting, WebEx, Zoom or some other tool allow participants to log on with their laptop – this may give them a better view of the screen being shown – it was hard to see in the back of the room.

Ask the proposers for their lessons learned.

Have water, have snacks!

Don’t assume that evaluators already know the process or expectations, even if they work within the procurement field everything should be clearly explained. Better to over-simplify than to deal with confusion later.

Overall, I felt round 3 was very well put together. I appreciated the ongoing communication from the organizers and the evaluation forms. The one piece of feedback I have is regarding the content of the demonstrations – I would have preferred if the demonstrations were broken up a bit more to preserve relevance of the content reviewed. I feel the finance and accounting group could have covered the content they needed within a 1 hour session with each proposer, as opposed to being grouped with procurement and attending the 9 four hour sessions.

Although it was long and tedious to go through, I think we definitely can improve be sectioning off for whether it was procurement, information systems, or financial, it was difficult to be there when I felt I didn't need to be there.

If we can mandate that the vendors must discuss

Day 1 Procurement

Day 2 Systems

Day 3 Financial

Not in any particular order, at least this way, I can have the option to chose to be at which category instead of grinding it out for all 3 days not knowing when they going to discuss which topics.

Besides this, I think the process will improve tremendously.

I thought the demonstrations worked very well.  I liked the scoring sheets, they were easy to follow.  Having the list of requirements to check against worked well for me.  The sessions were long, but not too long.  Overall I was very pleased with how well organized the demonstrations were.   Loved he cookies and water by the way, that was an unexpected treat.  Having the full list of wants as well as the must haves would have cluttered things up.  I liked the sleek, to the point score sheets.  The locations were comfortable, the screens were easy to see and the rooms small enough that it was easy to hear each presenter.  Having extension cords pre-laid out made it easy and convenient to plug in laptops.  Overall I was impressed with how well things were thought out and how smoothly the sessions went.  Good job.  Kudos to everyone involved in setting up these demos.

Was the evaluation form clear, easy to follow, easy to use? How could it have been improved?

*For the most part, yes. However, the colors were too much and there should have been more of an understanding on what to put for the Total Scores per section (average or adding all together, etc.).*

Did having the crosswalk of requirements to demo topics help with your scoring?

*At first, yes, but then trying to follow along with the Demo and see if all things were covered was too difficult due to the sporadic way the companies did their demo. I think if they were told what subject to cover in a specific order, then yes, it would have helped more. Also, it would have been nice to have this document about a month BEFORE the first demo, not the day of the first demo.*

Should have all requirements been included (like to have’s were not listed)?

*No. Then people only focus on the ‘like to haves’, not on what is required.*

How did the locations work? Comfortable, access, etc.

*The ODFW was a great place. The L&I building was terrible – while the room was ok, the chairs were uncomfortable for the length of time there, and the parking made it a real pain.*

Were the sessions long enough to allow for comprehensive coverage but short enough to endure?

*Yes, some were more than enough time to make a decision* 

Were the evaluation instructions clear?

*Yes, However – When interviewing new employees, it is very common to judge (evaluate) them against each other. That is how you know you are choosing the best person. The same should have been employed in these Demo’s. We should have been able to keep our evaluation forms for each vendor and then fill them out after the last demo.*

*Additionally: I feel that there should have been better notifications all around. We didn’t know until a week before the demos began that we could have up to 5 people represent our areas. With some people’s schedules, this was not enough time to have key personnel involved with the demo evaluations. Also, any documentation we needed to review to understand what we were looking for in the demos (Evaluations, ‘Crosswalk’, project expectations, etc.) should have been provided at least a month prior to the demo’s to enable the evaluators time to ‘get up to speed’ on what we were expected to evaluate.*

 I think that we should have split up the scoring for accounting and procurement rather than have both functions scores combined into one final score.  There were enough differences between how the procurement side functioned vs. the accounting portion that made it really hard to reflect how each function really saw the system.

It might have been good to split up the sessions into shorter length.  It was hard to stay engaged after the first couple of hours and we noticed people were losing interest (or focus anyway) about 2 hours in.  I know with our schedule it would be hard but it is a suggestion if it could be worked out in future projects.

Evaluation process for the demo round seemed to have confusion about how we were going to do it.  Some people told us we would each score individually and submit those (each person’s score) but then we found out that we were to combine our scores amongst all participants from the agency and submit one score.  I think there might be some clarity that can be provided to the evaluators if this process is used again.

The crosswalk didn’t help us much when we evaluated the demos.  We know they meet the requirements because they are still in the potential vendor pool so I wanted to really see how the system functioned and try them out for myself.  I saw round 3 as my chance to really see what the solution looked like and how it functioned rather than ensuring they met every requirement in their presentation.  On that same note I don’t think that including all the requirements (even the desirables) is necessary; again I think people really were wanting to see the system not check off that they met every requirement.  I’m not sure including all of the requirements would have changed the overall process or scores that were given to the proposers.

Was the evaluation form clear, easy to follow, easy to use?  The form seemed easy to use, a little daunting at first, but figured out the *User Interface vs. Solution Demonstration* sections after using the form the first day.

Should have all requirements been included (like to have’s were not listed)? Not necessarily, if it was not a requirement.  It was Okay to leave out.

How did the locations work? Comfortable, access, etc. Locations were excellent, however a little more time could have been made in set-up to make sure the computer connections were ready  for the proposer and a staff member was on-hand to help during initial set up.

Were the sessions long enough to allow for comprehensive coverage but short enough to endure? Yes, adequate time for proposer and evaluations was provided.

Additional comments:

Perhaps more clear instructions to the proposer regarding the “hands on” portion would be beneficial.  A lot of time wasted getting logged into their system to test and/or issues with same log in.  Not able to clearly test all aspects as someone else was logged in as same user and perhaps ahead of where you were and therefore you couldn’t see some features.

This was my first time doing an evaluation.  It was a little overwhelming on Day 1, but got it figured out, easy by day 3.

Thank you to Forestry and Fish & Wildlife for using their facilities.

I thought Round 3 demos went well. The instructions were clear and the location was good. I like having the room large enough that we were not on top of each other. The sessions were good in length. Some of the vendors were not prepared to review all the requirements in the time given and were rushed, however that was their doing not us. I also think the way some of the vendors approached questions threw off the demo. Having the list of the requirements was a huge help. I do not think it was necessary to list all the “nice to have’s”.