

# EVALUATOR GUIDELINES

## OVERVIEW

These guidelines have been developed based on input from prior evaluators. You may wish to review the complete Project Evaluation Guidelines and Application Instructions, available at <http://www.ofm.wa.gov/budget/instructions/capinst/13-23capinstr/highered.asp>.

## EVALUATION PANEL

Evaluation panel members will be reviewing one or more categories of project proposals. Panels will be structured so that members will not be reviewing project proposals from their own institution. Panels are comprised of evaluators from OFM, the Council of Presidents, the Department of Commerce, the Department of Enterprise Services, the Department of Corrections, and both capital facilities and academic representatives from the four-year higher education institutions.

Panels will be set up in small groups, facilitated by OFM or legislative staff. Facilitators are non-voting members. All questions regarding the process or individual proposals should be directed to the panel facilitator.

Panel members and facilitators will be asked to complete a confidentiality statement at the beginning of the process, indicating that any written or oral information related to the evaluation process, including panel assignment, will remain confidential until the final scores are publicly released by October 1, 2012.

**Evaluation and Scoring Process Objectives.** The evaluation process has the following objectives:

- Provide decision-makers with comprehensive and accurate analysis of the relative value of potential capital projects
- Conduct a transparent, fair, and understandable project review process
- Provide comparable information across multiple institutions and projects
- Respond to legislative direction to OFM to coordinate the evaluation and scoring process for capital facility project requests
- More closely align the higher education capital project selection process with the community and technical college system model

## PROCESS

The panels will work through a multi-part process:

- Orientation/Information Gathering
- Project Proposal Review and Scoring
- Review Scoring Results and Debrief

This process will take place over 3 meetings. Please see schedule at the end of this document.

1. Meeting #1: Panel Orientation, proposal distribution.
2. Meeting #2: Panel Discussion and scoring of proposals.
3. Meeting #3: Public announcement of scores.

**Please note that it is critically important that each panel member is able to attend both meetings #1 and #2.** If a panel member is unable to attend both of these meetings, his/her scoring will not be considered.

Attendance at meeting #3 is optional. Project scores will be released electronically after the public announcement.

## **Orientation/Information Gathering**

During the orientation phase there will be one meeting. The purpose of the meeting is to acquaint the panel members with the process and guidelines for evaluating projects, and to ensure that members understand the desired outcomes of the process.

### **Panel Meeting #1: Panel Charge**

*This meeting will last between 2-3 hours and will be scheduled sometime during the week of August 13-17, 2012 by the panel facilitator at a time that works for all panel members.*

- Confidentiality statements will be collected at or prior to Meeting #1.
- Overview and Q&A about the process, project categories, and evaluation criteria
- "Example scoring" and development of a common understanding about definitions, criteria, and scoring protocols
- Proposals, evaluation guidelines, and blank score sheets will be distributed to panel members.

OFM will distribute the submittals to the small group panels. Panel members will independently review the project proposals and note any questions they have about the proposals and how to apply the criteria. Panel members will forward any questions to the panel facilitator in advance of Panel Meeting #2. Institutions will then have the opportunity to respond to panel questions in writing prior to Meeting #2. Proposals should be scored objectively based on information provided by the institutions through the submittals and responses to any follow up questions. Panel members should come to Meeting #2 having completed a preliminary scoring of the proposals.

*Panel members will be reviewing approximately 7-10 proposals between Meeting #1 and Meeting #2.*

### **Panel Meeting #2: Review and Scoring**

*This meeting will last between 2-4 hours and will be scheduled sometime during the weeks of August 27-September 7, 2012 by the panel facilitator at a time that works for all panel members.*

- Discuss application of criteria to project proposals generally
- Review institutions' responses to panel members' questions
- Review preliminary scores of assigned project proposals
- Score assigned project proposals

The purpose of this phase is to determine a score for each project within each category. The panel members will meet to assign scores to each project under their review.

### **Combined Small Group Meetings: Resolve Tie Scores**

If necessary, two (or more) small groups will meet jointly to resolve any tie scores within the same category. OFM will then compile the individual scores.

Project scores, prioritized within each category, will be released to Fiscal Committees in the Legislature and the institutions by October 1, 2012.

## KEY DATES FOR THE 2013-15 CAPITAL PROJECT EVALUATORS

Evaluation Guidelines and Application Instructions released	On or before 4/1/2012
Institutions nominate panel members to assist in scoring	April 16-27, 2012
OFM recruits panel members from agencies and creates evaluation panels	April 16 - May 18, 2012
Institutions submit completed Predesign Documents to OFM	July 1, 2012
OFM and Facilitators notify evaluators of panel assignments and collect confidentiality statements.	Mid July, 2012
<b>Institutions submit Project Proposals</b>	<b>August 1, 2012</b>
<b>Evaluation Panels Meeting #1: Orientation and Charge</b>	<b>August 13-17, 2012</b>
Panel members independently review Project Proposals	August 13-27, 2012
Panel members forward follow-up questions to panel facilitator	On or before August 17, 2012
Institutions respond to follow-up questions.	August 20 - August 24, 2012
<b>Evaluation Panels Meeting #2: Evaluation Panels complete project scoring</b>	<b>August 27 - September 7, 2012</b>
Labor Day	September 3, 2012
OFM compiles scoring results	September 10-21, 2012
Evaluation Panel Meeting #3: OFM presents scoring results to four-year institutions; attendance optional.	September 24-28, 2012
<b>Release results to Council of Higher Education and legislative fiscal committees, and four-year institutions</b>	<b>10/1/2012</b>