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| **Evaluation Panel Instructions:** **<<Project Name>>** | Tick |

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| **import-info** | **Template instructions**These instructions should be tailored to meet the specific needs of your project.  |

1. Before you start – some key principles about the evaluation process

When evaluation panel’s are scoring submissions, our top of mind focus must always be on ensuring our individual and collective behaviours meet appropriate standards of probity.

* Everyone involved in the evaluation must have completed/signed a Conflict of Interest & Confidentiality Agreement.
* Confidentiality must be respected and maintained throughout the process
* Contact with suppliers - the panel chairperson is the only person permitted to comment to outside parties about the evaluation process and outcome. The panel should not discuss any element of the process with work colleagues or any other party.

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| import-info | **Conflict of Interest / bias:** The evaluation process must be free of bias and any perception of bias. Any conflicts of interest (Actual, potential or perceived) and possible issues of bias must be disclosed and discussed with the Panel Chair before commencement of this stage. |

2. Instructions – initial evaluation

There are a number of principles that should be applied when you are evaluating the supplier submissions:

* Each evaluator must carry out an independent evaluation. Individual scores will then be reviewed and debated as a panel. Either a consensus will be arrived at or panel members will be asked to carry out a ‘second pass’ of their evaluations, taking into account the panel discussions. ***[Delete this point if not applicable]***
* Our evaluation plan separates the budgetary (price) and non-budgetary parts of the evaluation – the panel members evaluating the non-budgetary aspects do not (and should not) have access to price/cost information. The Panel Chair will act, as a conduit between each of the teams to ensure any transfer of information is managed appropriately. ***[Delete this point if not applicable]***
* Tenders must be evaluated in strict accordance with the criteria enclosed/attached to these instructions.
* Only information contained in the tender submission is to be evaluated. You may also take into account information obtained from any early stage of the process. No extraneous views, supposition or assumptions should influence your evaluation.
* You must evaluate each submission on its own merit and not in comparison to another submission. While moderation will involve naturally comparing the evaluation of scores across tenders, evaluators should keep any such comparison to a minimum.
* Clear, succinct but comprehensive notes are required in support of your scores. All evaluation notes and material must be retained for audit purposes.

**Next steps:**

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| 1 | Independently score each proposal | * Independently score each submission using the attached ‘Tender Evaluation Form’.
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| 2 | Panel review meetings | * Panel review meetings are scheduled as follows:
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|  |  | **Date** | **Time** | **Venue** |
|  | Meeting 1: |  |  |  |
|  | Meeting 2: |  |  |  |

2. How to score each submission

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| **import-info** | **Template instructions**This next section should be updated with sufficient guidance to enable panel members to consistently score each submission. Three example rating scales are included. Your agency may also have its own approved evaluation scales.  |

The following rating scale shall be used to score each qualitative/non-budgetary requirement. The evaluation methodology << doesn’t / does>> permit ½ marks (eg. 4.5, etc).

Rating scale ‘A’

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| **Assessment** | **Definition** | **Score** |
| Excellent | Exceeds the requirement. Exceptional demonstration by the supplier of the relevant ability, understanding, experience, skills, resource & quality measures required to provide the supplies / services. Response identifies factors that will offer potential added value, with evidence to support the response. | **5** |
| Good | Satisfies the requirement with minor additional benefits. Above average demonstration by the Supplier of the relevant ability, understanding, experience, skills, resource & quality measures required to provide the supplies / services. Response identifies factors that will offer potential added value, with evidence to support the response. | **4** |
| Acceptable | Satisfies the requirement. Demonstration by the Supplier of the relevant ability, understanding, experience, skills, resource & quality measures required to provide the supplies / services, with evidence to support the response. | **3** |
| Minor Reservations | Satisfies the requirement with minor reservations. Some minor reservations of the Supplier’s relevant ability, understanding, experience, skills, resource & quality measures required to provide the supplies / services, with little or no evidence to support the response. | **2** |
| Serious Reservations | Satisfies the requirement with major reservations. Considerable reservations of the suppliers relevant ability, understanding, experience, skills, resource & quality measures required to provide the supplies / services, with little or no evidence to support the response. | **1** |
| Unacceptable | Does not meet the requirement. Does not comply and/or insufficient information provided to demonstrate that the Supplier has the ability, understanding, experience, skills, resource & quality measures required to provide the supplies / services, with little or no evidence to support the response. | **0** |

[\*Based on OGC rating scale]

(or) Rating scale ‘B’

| **Rating** | **Definition** | **Score** |
| --- | --- | --- |
| Exceeds requirement | The Respondent is able to demonstrate a level of service **beyond** the Ministry’s expectations, stated requirements and business objectives **and** the level of service proposed by their competitors. The Respondent is offering **major** **enduring benefits** in terms of reduced risk and/or a quantifiable value add to the Ministry with little or no increase in costs. | 9 – 10 |
| Meets requirement with **Major** value add | The Respondent demonstrates that they are able to meet the Ministry’s requirement and business objectives. Adds some **major** areas of benefit to the Ministry with **little** or no risk and/or increased costs | 7 – 8 |
| Meets requirement with **Minor** Value Add | The Respondent demonstrates that they are able to meet the Ministry’s requirement and business objectives. Adds some **minor** areas of benefit to the Ministry with **some** risk and/or increased cost. | 4 - 6 |
| Meets requirement | The Respondent demonstrates that they are able to meet the Ministry’s requirement and business objectives to an **adequate level.**  | 3 |
| Limited understanding of requirement | The Respondent is **unable** to meet the Ministry’s requirements and business objectives and would require considerable guidance. | 1 – 2 |
| No response or does not meet requirement | The Respondent **does not offer** an explanation or ability to meet the Ministry’s requirements and business objectives.  | 0 |

 (or) Rating scale ‘C’

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| **Compliance** | **Definition** | **Deficiency** | **Definition** | **Score** |
| Significantly Exceeds | Significantly exceeds the requirement in a way that provides significant 'added value' to MED. |  |  | 9-10 |
| Exceeds | Exceeds the requirement in some aspects and offers some added value to MED |  |  | 7-8 |
| Meets Requirements | Has shown an understanding of the requirement to a minimum level. |  |  | 5-6 |
| Can provide the requirement to the minimum level. |
| Unsatisfactory |  | Minor | Marginally deficient. | 3-4 |
| Minimal cost or schedule impact to address. |
| Minor negotiation required to achieve requirement.  |
| Unsatisfactory |  | Significant  | Requirement only partially met.  | 1-2 |
| Achievement of the requirement will impact on cost or schedule. Significant negotiation required. |
| Unsatisfactory |  | Critical | Requirement not met to any degree by the solution offered.  | 0 |
| No information provided. |

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| import-info | **Rating scale ‘A’:** This basic 5-point scale is appropriate for evaluating low-value, low-risk projects. The odd-number scoring scale means that people can ‘sit on the fence’ and take a neutral position; an even-number scale forces respondents to take a non-neutral position. See Scales B & C below.**Rating scale ‘B’:** This 9 or 10-point scale can be used for evaluating most procurement. Setting ‘Meets Requirements’ at 3 allows for greater scrutiny of submissions where it is anticipated that most suppliers are likely to meet the baseline requirements.**Option – 9 Point or 10 Point scale?*** A 9-point scale means that people can ‘sit on the fence’ and take a neutral position.
* A 10-point scale forces respondents to take a non-neutral position.

**Rating scale ‘C’:** This 10-point scale can be used for evaluating most procurement. It takes a different approach to Scale B by setting ‘Meets Requirements’ at 5. It also goes down to a greater level of granularity in terms of assessing the deficiencies within submissions and the extent to which remedial action could still enable a submission to be an acceptable option. |