

**Evaluating a Tender**

**Introduction**

A tender evaluation shall consist of a commercial and technical assessment.

The commercial assessment is carried out by Procurement using an arithmetical calculation.

The technical evaluation is carried out by a tender evaluation panel who shall score the tenderers responses to a set of questions based on a pre-determined scoring mechanism. It is one of the most important stages of the procurement process. This stage of the process ensures that:

* The contract award decision is objective
* The decision-making process is fair, transparent and auditable
* The University can demonstrate best value in the tender process

An evaluation panel of at least two people should be established and consist of individuals with the technical knowledge of the procurement to evaluate tenders. The evaluation panel membership should be consistent throughout the entire evaluation process, from pre-qualification to any presentations or site visits. The evaluation panel should be able to withstand any scrutiny and not be associated in any way with any of the tendering suppliers. Prior to the commencement of the evaluation, each panel member will be required to complete the Conflict of Interest Declaration enclosed below.

[Conflict of Interest Declaration Form 2023](Conflict_of_Interest_Declaration_Form_2023.docx)

The role of Procurement in the evaluation panel is to ensure an impartial and objective approach is taken to the evaluation of tenders.

**The Technical Evaluation**

The evaluation criteria and scoring methodology will have been determined at the Specification stage and published to Tenderers in the Invitation to Tender (ITT).

Procurement will assist and work with the evaluation panel to determine the guidance notes against each question and score prior to issuing the Invitation to Tender.

Once tender responses are returned, the panel members should read and score the technical aspects of the tenders independently using the pre-defined evaluation criteria and scoring system. The panel must provide a detailed explanation of why they scored each question the way they did. A full justification of scoring is especially important where a bid has failed to meet the 'good' expectation, as set out in the evaluation criteria, as this will form the basis of the standstill letters and debriefing that we are required to provide to the bidder on their submission.

The panel may be asked to carry out the scoring electronically through the University’s e-evaluation tool, AWARD (see below).

**Scoring Methodology** – Example

In this example, a specific question and relevant criteria have been used. Each scoring methodology will be related to the question. The guidance should provide the tenderers with an indication of how you would determine what a “Good”, “Acceptable”, “Minor Concerns” & “Major Concerns” response would be.

* 1. Please demonstrate your methodology and management approach to service delivery in meeting the Specification of Requirements. Your response must include:
* Detailed project plan identifying key milestones, timescales and outputs;
* Identify key risks associated with the Contract and how they will be mitigated;
* Demonstrate that capacity will exist at all times and how this will be managed;
* What contingency plans are in place;
* State how confidentiality will be maintained where required;
* How sub-contractors (if applicable) will be managed.
  1. This question will be evaluated and scored using the scoring methodology below.

**Scoring Methodology**

|  |  |
| --- | --- |
| **Score** | **Guidance** |
| **3 – Good** | The Tenderer has provided a strong methodology addressing all the key points listed above in sufficient detail providing confidence that the requirements can be met in full. |
| **2 - Acceptable** | The Tenderer has provided an acceptable methodology addressing most of the key points listed above in detail OR the Tenderer has provided all the key points listed above but lacks detail in answering the question fully. The response provides confidence that the requirements can be met. |
| **1 - Minor Concerns** | The Tenderer has provided a methodology addressing some of the key points listed above in detail OR the Tenderer has provided most of the key points listed above but lacks detail. The response provided does not provide confidence fully that the requirements can be met. |
| **0 - Major Concerns** | The Tenderer has failed to address the question, submitted a nil response or any element of the response gives cause for major concern. |

**During the Evaluation Process**

**Do's and Don’ts of Tender Evaluation**

| **Do** | **Don't** |
| --- | --- |
| Make note of areas that are unclear for clarification with the bidder | 'Read between the lines' or make assumptions |
| Read the submission at face value and score based on the information provided | Collude with other panel members to agree scoring collectively |
| Score tenders independently and discuss any irregularities at a Tender Evaluation Meeting | Make changes to the evaluation criteria during the process - the criteria MUST be the same as that published in the ITT |
| **Ensure full justification for scoring is provided for each question to assist with debriefing** |  |

A justification should be provided against each scored question that provides evidence the Bidder has met the key points within the Guidance Section.

**Examples of Satisfactory and Unsatisfactory justifications**

| **Satisfactory** | **Unsatisfactory** |
| --- | --- |
| The bidder has exceeded the minimum standards of services and/or quality of goods by …..(Give examples on the specifics of the bid that is over and above the minimum requirements of the specification) | **Excellent Response** |
| The bidder has demonstrated good understanding of the services/goods/works by providing information including…..(Give specific examples of why you thought it was a good answer) | **Good Response** |
| The bidder met the criteria of the specification, the bid was a basic response due to the lack of information on…..(Give examples of what was missing from the bid, what could they have done better) | **Ok** |
| The answer provided did not demonstrate an understanding of the services/goods/works required, (Give examples of why you feel the answer did not meet the criteria, what was missing, what could they have done better) | **Not enough information/Never answered the question.** |

Once they have completed their evaluation, each panel member should inform Procurement. Procurement will then review the scores and assess whether a consensus meeting is required to complete the evaluation. If a consensus meeting is required, the panel of evaluators will meet to agree the final scores. This process to agree the final scores must be fully transparent and documented.

**The Commercial Evaluation**

Procurement will evaluate the price or commercial aspects of the tenders separately but may ask the panel members to check their assessment of the costs. **As a matter of good practice, no member of the evaluation panel should assess both the technical elements and the commercial elements of the tender**.

**Presentation/Site Visits**

The tender evaluation stage may be accompanied by presentations, off site visits and/or clarification meetings.

Presentations and external site visits can be included as part of the evaluation process to offer the opportunity for the evaluation panel to gain a clearer and deeper understanding of the tenderers’ proposals.

The purpose and anticipated outcomes of the presentations and site visits must be made clear in the Invitation to Tender (ITT) documentation including details of how the visits will count towards the overall evaluation of the tender submissions.

Details of any scoring for either the presentation or site visit must be pre-agreed and published with the Contract Notice and ITT documentation.

**AWARD - e-evaluation tool**

AWARD is an electronic tool for evaluation of bids received. Each member of the evaluation panel will receive an email notification that the bids are available to start the evaluation.

Further training and guidance on the utilisation of AWARD will be provided by Procurement.