Evaluation and recommendation report

Template

(Insert procurement activity and reference number)

|  |
| --- |
| **When to use this template**  This template can be used to document and obtain approval for the evaluation process.  **Please delete this text box and remove any user notes before use.**  Use of this template is optional – remember to check your agency’s policies and procedures to check whether your agency has a standard template available that you are required to use.  **For more information on the *Buy Queensland* approach to procurement please visit** [www.qld.gov.au/buyqueensland](http://www.qld.gov.au/buyqueensland).  Get involved! This document is part of the Procurement Resource Centre. We would love to hear what you think, so please email your feedback to [betterprocurement@hpw.qld.gov.au](mailto:betterprocurement@hpw.qld.gov.au).  **Disclaimer**  This document is intended as a guide only for the internal use and benefit of government agencies. It may not be relied on by any other party. It should be read in conjunction with the Queensland Procurement Policy, your agency’s procurement policies and procedures, and any other relevant documents.  The Department of Housing and Public Works disclaims all liability that may arise from the use of this document. This document should not be used as a substitute for obtaining appropriate probity and legal advice as may be required. In preparing this document, reasonable efforts have been made to use accurate and current information. It should be noted that information may have changed since the publication of this document. Where errors or inaccuracies are brought to attention a reasonable effort will be made to correct them. |

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# Procurement details

On the (insert the tender release date)the State of Queensland through (insert the agency name), called for the provision of (insert the procurement activity name) (Insert reference number).

This report summarises the results of the evaluation process and provides a recommendation by the evaluation panel.

## Invitation to offer

(Insert information about the procurement method used – open, select or limited. If an open method was used insert details about the tendering website/s used. If a non-open procurement method was used then insert details about the suppliers invited and the basis on which they were invited.)

## Estimated spend

Estimated spend for the procurement is approximately (insert value) (GST inclusive).

# Evaluation

## Evaluation panel

[User note: evaluation is conducted by a panel, comprising of individuals with a range of experience and expertise. The team needs to include people with sufficient skills and experience to be able to understand the responses, and make judgements about both individual elements and the value for money offered by each response.]

Officers involved in the evaluation process are as follows.

|  |  |
| --- | --- |
| Evaluation panel | |
| **Chairperson** | (Name), (Title), (Division), (Department)  [User note: this is the person accountable for managing the evaluation process.] |
| **Panel member** | (Name), (Title), (Division), (Department) |
| **Panel member** | (Name), (Title), (Division), (Department) |
| **Panel member** | (Name), (Title), (Division), (Department) |

|  |  |
| --- | --- |
| Procurement delegate | |
| **Procurement delegate** | (Name), (Title), (Division), (Department) |

[User note: the below table can be deleted if a specialist advisor is not required. A specialist advisor could include, but is no limited to, a technical subject matter expert or a probity advisor.]

|  |  |
| --- | --- |
| Specialist advisor | |
| **Specialist advisor** | (Name), (Title), (Division), (Department) |

## Responses received

At the close of the procurement on (insert closing time and date), (insert number of)responses were received. Responses were received from:

* (insert supplier name)
* (insert supplier name)
* (insert supplier name).

### Late responses

[User note: delete this section if not applicable.]

All responses were received by the closing time and date of (insert closing date and time) except for:

* (insert supplier name) received (insert date and time received) due to (reason for late response).

The late responses were (insert whether the late offers were accepted or not for evaluation and the reason/s for this).

[User note: the evaluation plan and Conditions of Tender should also be referred to determine if a late response can be accepted.]

### Compliance screening

[User note: insert either of the two options below.]

(Insert – All responses received met the requirements of the screening process and therefore underwent evaluation.)

(Or alternatively insert – All responses were screened for compliance with mandatory requirements and the following responses were deemed non-conforming/non-compliant and could not be evaluated:

* (insert supplier name), due to (insert justification).

This response was not passed to the evaluation panel for detailed evaluation.)

## Evaluation process

[User note: the evaluation process must be conducted in accordance with the evaluation plan].

### Evaluation methodology and criteria

The criteria used for this evaluation is as follows:

* (insert evaluation criteria as per the evlaution plan).

#### Ratings

[User note: insert details of how offers were scored against the above criteria – the below is provided as an example only].

Scoring against evaluation criteria was done using a scale from 1 to 10.

| **Rating** | **Characteristics** | **Score** |
| --- | --- | --- |
| **Outstanding offer** | Highly convincing and credible. Offer demonstrates outstanding capability, capacity and experience relevant to, or understanding of, the requirements of the evaluation criteria. Comprehensively documented with all claims fully substantiated. | 10 |
| **Excellent offer** | Highly convincing and credible. Offer demonstrates excellent capability, capacity and experience relevant to, or understanding of, the requirements of the evaluation criteria. Documentation provides complete details. All claims adequately demonstrated and substantiated. | 9 |
| **Very good offer** | Offer complies, is convincing and credible. Offer demonstrates very good capability, capacity and experience relevant to, or understanding of, the requirements of the evaluation criteria. Some minor lack of substantiation but the supplier’s overall claims are supported. | 8 |
| **Good offer** | Offer complies, is convincing and credible. Offer demonstrates good capability, capacity and experience, relevant to, or understanding of, the requirements of the evaluation criteria. Minor uncertainties and shortcomings in the supplier’s claims or documentation. | 7 |
| **Adequate offer** | Offer complies and is credible but not completely convincing. Offer demonstrates adequate capability, capacity and experience, relevant to, or understanding of, the requirements of the evaluation criteria. Supplier’s claims have some gaps. | 6 |
| **Marginal offer** | Offer has minor omissions. Credible but barely convincing. Offer demonstrates only a marginal capability, capacity and experience relevant to, or understanding of, the requirements of the evaluation criteria. | 5 |
| **Limited offer** | Barely convincing. Offer has shortcomings and deficiencies in demonstrating the supplier’s capability, capacity and experience relevant to, or understanding of, the requirements of the evaluation criteria. | 4 |
| **Poor offer** | Offer unconvincing. Offer has significant flaws in demonstrating the supplier’s capability, capacity and experience relevant to, or understanding of, the requirements of the evaluation criteria. | 3 |
| **Very poor offer** | Unconvincing. Offer is significantly flawed, and fundamental details are lacking. Minimal information has been provided to demonstrate the supplier’s capability, capacity and experience relevant to, or understanding of, the requirements of the evaluation criteria. | 2 |
| **Inadequate offer** | Offer is totally unconvincing, and requirement has not been met. Offer has inadequate information to demonstrate the supplier’s capability, capacity and experience relevant to, or understanding of, the requirements of the evaluation criteria. | 1 |

[User note: the process for each evaluation will be different. Additional sections should be inserted as required to clearly document each stage of the evaluation process. From reading the final evaluation report it should be clear as to how the successful supplier was selected.]

##### Short-list process

[User note: only include this section if relevant.]

The compliant responses were assessed for their level of compliance against the evaluation criteria using the abovementioned evaluation methodology. Responses that demonstrated an overall poor or inadequate response were set aside from further evaluation.

Based on the outcome of this stage of the evaluation, in accordance with the scores above, the following responses were excluded from further evaluation.

|  |  |
| --- | --- |
| Respondent | Justification for exclusion |
| (Insert supplier name) | (Insert details) |
| (Insert supplier name) | (Insert details) |
| (Insert supplier name) | (Insert details) |

The number of shortlisted suppliers was decided through a unanimous agreement by the evaluation panel members.

#### Due diligence

The following due diligence checks where made: [User note: the below are examples only – please add or remove as required.]

* (reference checks)
* (ABN/ACN checks)
* (credit checks)
* (insurance certificate checks)
* (compliance certificate checks)
* (site visits)
* (clarifications of methodology and approach to delivery)
* (security checks).

# Recommendation

Detailed evaluation results can be found at **Appendix 1**.

The evaluation committee recommend that the provision of (insert procurement activity name) (insert reference number) be awarded to (insert the preferred supplier’s name) for (insert total value) (GST inclusive).

The proposed contract is for a period of (insert initial contract period) from the commencement date. The contract allows for (insert number and length of) contract extensions.

Signatories and sign off

**Evaluation panel**

|  |  |
| --- | --- |
| **Signatory details** |  |
| **Name** |  |
| **Position title** |  |
| **Division and department** |  |
| **Signed** |  |
| **Date** |  |

|  |  |
| --- | --- |
| **Signatory details** |  |
| **Name** |  |
| **Position title** |  |
| **Division and department** |  |
| **Signed** |  |
| **Date** |  |

**Evaluation panel chairperson**

|  |  |
| --- | --- |
| **Signatory details** |  |
| **Name** |  |
| **Position title** |  |
| **Division and department** |  |
| **Signed** |  |
| **Date** |  |

**Procurement delegate**

|  |  |
| --- | --- |
| **Signatory details** |  |
| **Name** |  |
| **Position title** |  |
| **Division and department** |  |
| **Signed** |  |
| **Date** |  |

**Approving officer**

|  |  |
| --- | --- |
| **Signatory details** |  |
| **Name** |  |
| **Position title** |  |
| **Division and department** |  |
| **Signed** |  |
| **Date** |  |

(Insert any additional signatories, if applicable).

# Appendix 1 – Evaluation results

|  |  |  |
| --- | --- | --- |
| **Supplier 1** | | |
| (Insert name of supplier) | | |
| **Details of any clarification obtained from the supplier** | | |
| (Insert details) | | |
| **Shortlisted** | | |
| (Y/N) | | |
| **Evaluation criteria** | **Score allocated** | **Evaluation team notes to justify score given (expand as necessary to provide full details)** |
| (Insert criterion) | (Insert score) | (Insert details) |
| (Insert criterion) | (Insert score) | (Insert details) |
| (Insert criterion) | (Insert score) | (Insert details) |
| **Comments:** |  |  |
| **Risks associated with response** | | |
| (Insert risks) | | |
| **Referee checks** | | |
| (Insert details regarding referee checks) | | |

|  |  |  |
| --- | --- | --- |
| **Supplier 2** | | |
| (Insert name of supplier) | | |
| **Details of any clarification obtained from the supplier** | | |
| (Insert details) | | |
| **Shortlisted** | | |
| (Y/N) | | |
| **Evaluation criteria** | **Score allocated** | **Evaluation team notes to justify score given (expand as necessary to provide full details)** |
| (Insert criterion) | (Insert score) | (Insert details) |
| (Insert criterion) | (Insert score) | (Insert details) |
| (Insert criterion) | (Insert score) | (Insert details) |
| **Comments:** |  |  |
| **Risks associated with response** | | |
| (Insert risks) | | |
| **Referee checks** | | |
| (Insert details regarding referee checks) | | |