

## Guide to Evaluation

The main objective in a tendering exercise is to obtain the best value goods and services for the organisation you are representing.

Whilst there are many parts to the tendering process, all of which are linked, this guide focusses on evaluation; what it is and how to do it.

### Who this is for:

This guide is intended to be used by anyone who is responsible for evaluating a tender for regulated procurements for any type of product or service as part of a consortium tender working party.

During the drafting stage, the lead for the tender will have considered how the evaluation will take place and will ensure it links clearly to the specification provided in the procurement documentation.

### What is evaluation

Evaluation is the process of identifying, from a number of offers, the bid which will provide the most economically advantageous tender. It may involve consideration of a wide range of elements, often with complex models for pricing, quality, technical and performance factors.

The aim, through a process of fair, equal and transparent treatment, is to clearly demonstrate the winning bidder through the allocation of scores across a range of areas.

Evaluators (as with other stakeholders involved during the tender process) may be asked to complete a form confirming they have no conflict of interest and will complete the evaluation process in line with the rules associated with best practice procurement. An example form is available at Appendix A.

### How to evaluate

Following receipt of all written submissions, evaluation can begin. The lead will provide you with access to an appropriate e-tendering portal, and also details on how to use the relevant areas. You should only assess the material submitted during tendering. It is important to ensure you do not let any previous experience or information you may have heard about a tenderer cloud your judgement. Your score must be based solely on the information that has been submitted during the defined tender process.

A key aspect of evaluation is understanding what the offer is, it is therefore vital that you allow plenty of time to read. It is difficult to estimate how long each assessment will take as everyone reads and analyses at different speeds, but this part is often the most time-consuming part of the process.

If time allows, you may benefit from reading all submissions first without scoring – this will help you get a feel for the range of responses and help you make considered assessments. However, you must be clear, that when evaluating you ensure you compare the bid against requirements, not against other tenders.

As you consider each response, if you read something that sounds particularly good or not so good make a note as this will help support your score. Fellow panel members may have scored differently to you and by taking notes it may help during moderation/consensus scoring.

Sufficient justification should be noted in line with the scoring descriptors provided in the tender documentation. This is important:

- To inform the discussion during moderation/consensus
- To provide feedback to unsuccessful bidders
- To reduce the risk of challenge the evaluation panel may receive
- To support the evaluation panel in robustly defending potential challenges

There will be an evaluation score sheet, or section on a larger spreadsheet, for each of the submissions. Ensure that you are completing the one that relates to the submission you are reading.

The evaluation criteria included in the tender will have been explained to you and you will be asked to provide a score against each of the criteria having read the responses to the questions posed.

If you are unsure about what score to give you should provide an initial score, then during the moderation process you will hear other people's views and scores and be able to amend your initial score if required. You will still need to note and present any relative strengths and/or weaknesses observed in the response to support the deliberation.

## Scoring Criteria

Scoring criteria will be determined at the tender stage. This table provides an example definition for scores 0-5. You may decide to use alternative values for example 0-3 or 0-6 and alter the description appropriately. Whichever criteria you use, it must be clear to understand for all evaluators.

Assessment	Score	Scoring Description
Cannot be scored	0	No information provided or incapable of being taken forward either because the Supplier does not demonstrate an understanding of our requirements, because the solution is incapable of meeting our requirements or if any element of the response gives cause for major concerns.
Unsatisfactory	1	Although the Supplier does demonstrate an understanding of our requirements there are some major risks or omissions in relation to the proposed solution to deliver the service and we would not be confident of our requirements being met.
Satisfactory	2	A response which is basically capable of meeting our requirements but does not provide sufficient details to demonstrate a good understanding of requirements.
Good	3	A response which shows that the Supplier demonstrates an understanding of our requirements and has a reasonable and credible methodology to deliver the service.
Very Good	4	A response which shows that the Supplier demonstrates a very good understanding of our requirements, has a credible methodology to deliver the service alongside a clear process providing value for money.



Excellent	5	A response which shows that the supplier demonstrates an excellent understanding of how the supply or service can comprehensively be delivered, and offering significant value fully aligned to the organisations' tender requirements.
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## Moderation

The lead on the tender will also usually act as a moderator. Moderators are responsible for directing a review of all the evaluation answers to provide a consensus result by selecting the most representative score.

Moderation will require all relevant parties to re-examine each tender carefully against the evaluation framework, line by line and challenges regarding the scores provided is encouraged to ensure no mistakes are made. Each individual tender must be considered independently of the others and the scoring process must not be influenced by comparable scores for other tenders. All details must be documented appropriately to provide robust and reliable feedback as required. This process is sometimes called a consensus meeting. At the end of the meeting, evaluators will be asked to formally agree the final outcome to ensure that the process is transparent and group led.

A final award report will be issued to all members of the tender working party.

*Version 1. November 2020*



## Evaluator Acknowledgement

Agreement Ref. No:

Agreement Title:

The evaluation shall be carried out strictly in accordance with the Lead Consortium's procedures and specifically in accordance with the procedure set out in the ITT documentation.

I understand and agree that:

- I have no personal, financial, or other interest in any of the companies involved in the tendering process
- I will notify the Lead Consortium immediately if my circumstances change to introduce any perceived conflict of interest during the tender process.
- I will undertake a rigorous examination and assessment of all submissions received on an equal and consistent basis without bias
- I will not divulge any scores/results to anyone outside the evaluation team
- I will ensure that all information relating to this evaluation will be treated as confidential
- No contact will be made with bidders during the process except by the agreement manager and only through the e-tendering platform
- Each score will be supported by clear and defensible rationale, explaining what is required to score higher
- The evaluation criteria will be followed and applied consistently and objectively throughout the evaluation process

Click 'Accept' to confirm agreement to the above.

Click 'Reject' if you have any doubt about any of the statements above.

If you select this option, please speak with the Agreement Manager immediately.

Accept       Reject

Evaluator's Signature:

Date:

