Technical Evaluation

Before starting this stage you will already have assessed and determined the successful tenderers at the **Selection Stage**.

Technical and quality evaluation is one of the most important stages of the Procurement Journey. This stage of the Journey ensures that:

- The contract award decision is objective and uses the disclosed criteria
- The decision making process is fair, transparent and auditable
- Your Organisation can demonstrate best value in the tender process

Tender Evaluation Timescales

Open or close

Tender evaluation can only take place once the deadline for tender submissions has passed. The time taken to evaluate the returned submissions will vary from project to project. This will depend on the complexity and the number of responses received. You should aim to provide approximate timescales for this stage as part of the **Invitation to Tender (ITT)** document.

Evaluation Panel

Open or close

An evaluation panel of at least two people should be established. The panel should consist of individuals with the technical ability to evaluate tenders. This may or may not include the buyer. Ideally the panel membership will be consistent throughout the entire process including presentations and site visits.

The evaluation panel should be able to withstand any scrutiny. It is the responsibility of the Organisation to ensure that no member has a conflict of interest which would prevent them from making a fair and objective tender assessment or which might give rise to accusations that they were unable to do so.

The panel members should read and score the quality/technical aspects of the tenders independently. They must use the pre-defined evaluation criteria and scoring system, prior to a moderation meeting taking place.

At the moderation meeting the evaluators come together to agree the final scores. The process to agree the final scores must be fully transparent and documented. You should evaluate the commercial aspects of the tenders separately, including the **Price Evaluation**.

As a matter of good practice, no member of the evaluation panel should assess both the quality/technical elements and the commercial elements of the tender.

The evaluation criteria and scoring methodology should have been determined as part of the **Develop Documents** stage and published to tenderers in the Invitation to Tender (ITT).

The role of the buyer in the evaluation panel is to ensure an impartial and objective approach is taken to the evaluation of tenders. Some suggested ”Dos and Don’ts” are listed below:

The tender evaluation stage may be accompanied by Presentations/Site Visits.

Quickfire Guide

Quickfire Guide

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 on the basis of the information provided	Collude with other panel members to agree scoring collectively

Score tenders independently and discuss any irregularities at a Moderation 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	

Presentation/Site Visits

Open or close

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

The purpose and anticipated outcomes of the presentations and site visits must be made clear in the ITT documentation. This should include details of how the visits will count towards the overall evaluation of the tender submissions. Particular care must be taken to maintain transparency and equal treatment.

Details of any scoring for either the presentation or site visit must be pre-agreed and published within the relevant procurement documents.

You should ensure that the focus of these events is around the specification and delivery of the product or service, and not on the characteristics of the tenderer.

Unsuccessful Bids

Open or close

You should ensure the evaluation panel provides justification of their scoring. This will help when informing unsuccessful tenderers. A full justification of scoring is important and a record should be kept to ensure fairness and transparency of the process.

Comments made should not simply be a restatement of the scoring methodology. For example, if a response is assessed as “Good” it will not be sufficient to state that it is “relevant and good”. Comments must identify the features of the submission itself which justify the particular score. It may also be helpful to record what could have been added to the tender response to secure a higher score.

If **PCS-Tender** is being used, the justification for scores should be recorded on the system.

Care and Support Services

Open or close

For the procurement of Care and Support Services, an Organisation should consider whether it is appropriate for people who use the services and their carers to be involved in decision making. For example, participation in site visits and interviews with service providers or representation on the evaluation panel. The participation of these people must be consistent throughout the process. For example if they are involved in interviews with service providers, they must participate in all of the interviews arranged with service providers. Care must be taken, when involving people who use services and also their carers in the evaluation of tenders, to ensure that they:

- understand the evaluation process and are clear about their role in it;
- understand the criteria against which tenderers are to be evaluated;
- understand their obligation to be objective and impartial and to treat tenderers equally;
- understand issues relating to the commercial confidentiality of service providers;
- are able to commit the necessary time; and
- receive appropriate training and support.

The involvement of people who use services and their carers, if appropriate, in decision making should be considered on a case-by-case basis. It may, for example, be appropriate to involve them in the evaluation of tenders for the delivery of a discrete service for a small number of individuals.