Technical Evaluation

Before starting this stage you will already have assessed and determined the successful tenderers at the Selection Stage, if one is being used.

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.

The panel members should read and score the quality/technical aspects of the tenders independently. They should use the pre-defined evaluation criteria and scoring system already communicated as part of the tender process. For example, this could include an agreed approach on how to handle responses from different sizes or types of bidders. This is to ensure a consistent, non-discriminatory evaluation in line with the fundamental principles of procurement.

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.

The tender evaluation timescales may reduce if PCS-Tender evaluation is being used. This is because the comments and scores from all evaluators can be collated automatically. This information can also be used as the basis of the debriefing report.

Evaluation Panel

Open or close

Evaluation must always make sure equal treatment is undertaken in a proportionate, objective, transparent and non-discriminatory manner.

An evaluation panel of at least two people should be established. The panel should consist of individuals familiar with the organisation's priorities and goals, who demonstrable technical ability to evaluate tenders.

An organisation may also consider including panel members with relevant knowledge or experience across particular aspects of the technical and quality evaluation. For example, a human resources or trade union representative to help evaluate bidders' responses to a Fair Work practice criterion. See the **Fair Work First in Procurement guidance** for more information.

Ideally, the panel membership should be consistent throughout the entire process from pre-qualification to presentations and site visits.

The evaluation panel should be able to withstand any scrutiny. and It is the responsibility of the organisation to ensure no member has a conflict of interest which would prevent them from making a fair and objective tender assessment.

Moderation Meeting

Open or close

A moderation meeting should be held after you have collated the scores given. At the moderation meeting the evaluators come together to discuss and agree their final scores.

The process to agree the final scores must be fully transparent and documented.

Evaluation Responsibilities

Open or close

The buyer 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) or PCS.

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':

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	

The tender evaluation stage may be accompanied by presentations/site visits.

Evaluating Fair Work Practices

Open or close

See **Fair Work First in Procurement guidance**, for evaluation and award.

Unsuccessful bids

Open or close

You must ensure the evaluation panel provides justification for their scoring. This will help when preparing standstill notices and debriefing suppliers.

A full justification of scoring is especially important where a bid has failed to meet the 'acceptable' expectation set out in the evaluation criteria. A record should be kept to ensure fairness and transparency of the process.

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

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 Invitation to Tender (ITT) documentation. This should include details of how the visits will count towards the overall evaluation of tender submissions.

Care and Support Services

Open or close

For the procurement of services which have a direct impact on the public, for example **Care and Support Services,** an organisation should consider whether it is appropriate for people who use 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 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.

You should consider on a case-by-case basis involving people who use services and their carers in the decision making. For example, it may be appropriate to involve them in the evaluation of tenders for the delivery of a discrete service for a small number of individuals.