Form A

*(reg. 8(3))*

Evaluation Report

Procuring entity’s name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Evaluation of tender no: **\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

## Short title of what is being procured: *\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_*

# Scope of tender: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

This tender covers the design, supply, installation and commissioning/the purchase of ..……………………./the appointment of Consultant for …………………………………

**a. Method of procurement (*capture as per invitation to tender*)**

A formal open tender invitation was advertised in the local press and or international press; or

This was a selective/single sourcing tender restricted to suppliers/ contractors/ consultants approved by the Accounting Officer/ his or her representative on (*date*) …… The pre-qualified consultant/ suppliers/contractors are:

1. …………………………..
2. …………………………..

**b. Tender closing date and bid validity**

The closing date for submission of bid proposals was ……………. The tender validity period was ………… from the closing date of the tender and therefore the bids expires on ……………..

**c. Brief background**

Give a short synopsis of the circumstances leading up to the purchase/construction, or appointment of consultant, or provision of service and the reason for the purchase.

This paragraph should convey to the reader the necessity for the purchase and benefits to the procuring entity (PE) arising from the procurement action. Wherever applicable a cost benefit analysis is to be included. At the very least the benefits to the PE should be detailed.

The constitution of the evaluation committee should be stated here. At least three officers should evaluate the tender in line with the Public Procurement Regulations.

# d. Tenders received

Here should follow a summary of all tender proposals received. This may be stated in a few lines, under paragraph headings, or summarised in a table such as the example below. The choice of presentation lies with the author and it depends on the method of submission of tender responses. Bid Opening Forms should be appended appropriately.

*The choice of format will depend on that which is necessary to achieve clarity, and in order to create a neat presentation.*

# e. Summary of Tendered Prices

|  |  |  |  |
| --- | --- | --- | --- |
| **Tender No.** | **Contractor/Supplier/Consultant** | **Tendered Price (PULA)** | **Completion /Delivery Time (WEEKS)** |
| **1** |  |  |  |
| **2** |  |  |  |
| **3** |  |  |  |

**f. Evaluation criteria as per ITT**

A summary of the evaluation criteria as per the RFQ/ITT should be stated. An ITT or sections of it can be annexed to the evaluation report.

*In this section a short paragraph explaining the evaluation process should be covered and the ITT/Evaluation Criteria attached to the report for further details where necessary.*

*.*

**g. Tender evaluation**

**Procedure:** The number of those in the evaluation committee and their positions and names should be stated.

**Results:** A short synopsis of the evaluation of the quotations or tenders detailing the process followed as per the criteria in the ITT/RFQ, including factors considered, price comparisons, cut-off points, financial vs. technical weighting, criteria for compliance check etc, and the reasons for the selection of the recommended supplier(s). The evaluation should clearly detail the findings under each stage of evaluation as set in the ITT as follows:

***Compliance Check***

The basis of disqualification of each bidder should be stated and all those proceeding to the next stage of assessment indicated.

***Technical Evaluation***

The scores from each evaluator should be stated, summed and averaged as the ITT dictates. A summary of comments on each bidder should be done.

***Financial Evaluation***

*In this section the tenders should be brought to a common base in Pula (where appropriate), and the rates of exchange used, the date and source are to be indicated. Rates used should be as per the requirement of the ITT. Tendered rates subject to foreign exchange adjustment should be adjusted to the rates prevailing at the time of tendering. Where applicable a comparison should be made with previous price(s) paid and comment made on whether the prices/ price increases are considered fair and reasonable. In this section the evaluators should adjust tender prices where applicable applying price preferencing for purposes of comparison. Any arithmetical errors should be stated and the position taken.*

Individual comments for each bidder should be consolidated into strengths and weaknesses of the bidder which constitute the findings of the evaluation Committee in addition to the scoring. Individual score sheets with annotations should be appended.

**Conclusions**: should be drawn which will lead up to the recommendation. In some instances it may be preferable to have the ANALYSIS and CONCLUSIONS under separate headings depending on the method of evaluation and what is procured. The basis of the recommendation should be in line with that under the ITT.

*The report shall contain a statement of any disagreement and the reasons thereof, further discussions held on the issue and the names of those holding alternative views. Where members of the Evaluation Committee disagree on the results of an evaluation, the findings and recommendations of the majority shall be stated in the evaluation report.*

**h. Recommendations**

*The recommendation will be similar to this:*

It is recommended that the Accounting Officer make a decision (approve/reject/stand down/defer/etc)

i. the opening of financial proposals from

XYZ at a score of

ABC at a score of

DQL at a score of

As the bidders have met the cut-off point of \_\_\_ as stipulated in the ITT.

ii. The return of unopened financial proposals from companies *XYZ* as they failed to meet the cut-off point by scoring below, or

iii. It is recommended that the Accounting Officer approve;

* the award of a contract for the supply/provision/construction of ……..to XYZ Company who submitted the lowest, technically acceptable tender or who scored the highest, at a total cost of **P ….. inclusive of \_\_\_\_\_ taxes** with a construction/delivery period of ……… weeks.
* The allocation of plots \_\_\_\_ measuring \_\_\_\_\_ for sale/lease on a \_\_\_ year Fixed Period State Grant/lease at a purchase price/ rental of \_\_\_\_\_\_\_\_\_\_\_ per annum to \_\_\_\_\_\_\_\_\_\_\_ who scores the highest.

*“RECOMMENDATIONS should reflect the VALUE OF TENDER, RECOMMENDED TENDERER and DURATION OF DELIVERY OF THE WORKS/SERVICES/SUPPLIES.*

**i. Observations or opportunities for improvement**

*The report may contain general comments / observations that may be used for future improvements.*

|  |  |  |
| --- | --- | --- |
| **Evaluator’s name** | **Signature** | **Date** |
|  |  |  |
|  |  |  |
|  |  |  |
|  | | |
| **Secretary’s name** | **Signature** | **Date** |
|  |  |  |

***The evaluation report shall be signed by all members of the Evaluation Committee in attendance and so are the score sheets.***

*Here should be listed the Annexure to your report so that the Adjudicator knows where to look for them further information such as:*

Annexure A: ITT

Annexure B: Bids/Proposals

Annexure C: Bid Opening Forms

Annexure D: Evaluation Minutes and Individual Annotated Score sheets

Annexure E: Funds Approval Form

Annexure F: Declaration of Interest Form

Annexure G: Confidentiality Form

Annexure H: Integrity Agreement Form

Annexure I: Certificate of Availability of Funds

*These annexure should be properly referred to in the body of the report.*