Evaluation Report

|  |  |
| --- | --- |
| RFx: [Number and Name] | |
| Document number: [TRIM Record Number] | Date: Thursday, June 21, 2018 |

Contact details

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# Introduction

## Objective

The purpose of this evaluation report is to document the results of the responses received for [RFx # and Name] and to make recommendations for awarding based on overall value for money.

## Sourcing strategy

[Insert a summary of the sourcing strategy as approved in the procurement strategy. This can be obtained from summary provided in the evaluation plan.]

## RFx

### Tender period

[RFx # and Name] was released via NSW eTendering on [date], and closed on [date]. [List who was involved in opening the RFx responses].

### Informing the market

[Guide Note: Explain how awareness of the RFx was generated in the marketplace. i.e. open tender advertised on NSW eTendering; eQuote issued to select respondents (who were selected on the basis of…). An industry briefing was conducted … and all invited respondents attended / An industry briefing was not deemed necessary.]

### Addenda

[Guide Note: Identify whether any addendums were issued. If so, how many, when were they released and what was the catalyst and objective of the addenda. Provide summary of material changes. If no addenda were issued, state so].

### Contract value

The estimated total contract value is $ [insert value].

# Evaluation

## Evaluation team members

The evaluation of RFx responses was conducted by the evaluation team which consisted of the following members.

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Title | Role | Voting Member |
| Name | Job Title, Organisation | Chairperson | Yes/No |
| Name | Job Title, Organisation | Evaluation Member | Yes/No |
| Name | Job Title, Organisation | Evaluation Member | Yes/No |
| Name | Job Title, Organisation | Evaluation Member | Yes/No |

[If applicable] A steering committee was formed and consisted of the following members.

|  |  |  |
| --- | --- | --- |
| Name | Title | Steering Committee Position |
| Name | Job Title, Organisation | Chairperson |
| Name | Job Title, Organisation | Member |
| Name | Job Title, Organisation | Member |

[Guide Note: Describe what guidance the steering committee provided as well as what advice and/or endorsements were provided? If applicable insert the details if any of the following were involved in the evaluation (expert / advisory / independent representatives etc) and their purpose, including any issues that were resolved with their advice.]

## Evaluation plan

The evaluation of the responses was carried out in according with the approved evaluation plan.

### Evaluation criteria

Responses to the RFx were evaluated against the following criteria.

|  |  |
| --- | --- |
| Criterion – Sample Only – Adjust criteria and weightings as required. | Weighting |
| Degree of compliance with the functional and technical requirements of specification. | 20% |
| Demonstrated expertise and experience in the successful implementation of the specified or similar system on a similar scale. | 10% |
| Demonstrated ability to meet the nominated timeframe for implementation | 10% |
| Qualifications and experience of proposed contract personnel and/or proposed sub-contractors | 10% |
| Quality assurance system in place | 5% |
| Suitability of implementation plan | 10% |
| Demonstrated financial viability and stability | 5% |
| Compliance with proposed conditions of contract, e.g. Procure IT | 5% |
| Price / Fee | 30% |
| Total (Overall Rating – Non Price 70% Price 30%) | 100% |

## Evaluation of responses

### Respondents

A total of [x] responses were received from the following respondents.

|  |  |  |
| --- | --- | --- |
|  | Respondent | ABN |
| 1. | Company/Business Name | 99 123 456 789 |
| 2. |  |  |
| 3. |  |  |
| 4. |  |  |

### Responses by category (where relevant)

All respondents were invited to respond across a number of streams of work under [RFx #]. The following matrix shows the responses received by each respondent.

|  |  |  |  |
| --- | --- | --- | --- |
| Respondent | Category A | Category B | Category C |
| Company/Business Name | ✓ | ✓ | ✓ |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

### Stage 1: Initial cull

[Guide Note: In line with the conditions of RFx and evaluation plan, detail the pass/fail requirements of the initial cull for this arrangement. List any mandatory criteria and the respondent’s compliance to each. Identify and provide comment on any:

* Seriously non-confirming RFx responses.
* Respondents not complying with the conditions of RFx set out in the sourcing documents (i.e. statement of requirements, and the contract).
* Respondents that are clearly not of an acceptable standard to warrant further detailed consideration.
* Responses received after the RFx event was closed and reasons why these where either accepted or rejected.

Document details of non-compliance and the reasons for any RFx response being excluded at this initial cull stage. If appropriate, the following may be stated]

The Evaluation Team conducted an initial review to identify any seriously non-conforming RFx responses. No responses were considered to be non-confirming and none were eliminated on the basis of excessive pricing, as allowed for under the evaluation plan. No late RFx responses were received. As a result, no RFx responses were culled at this stage and all therefore progressed to Stage 2 of the evaluation process.

### Stage 2: Detailed evaluation of remaining respondents

[*Guide Notes:*

*Evaluation - Document results of the detailed analysis of the responses in the evaluation matrix and apply respective scoring and weightings.*

*Relative value evaluations (value for money) - Comment on the price recommended and briefly note:*

* *The pricing approach used to evaluate the offers e.g. price plus service costs, delivery charges, packing costs etc.*
* *Any indications you have of the fairness and reasonableness of the price to both the supplier and government.*
* *Any indication of the price trend, e.g. averages appropriately % lower/higher than current contract prices.*
* *Any important points about price variation conditions proposed.*
* *If the lowest priced response is not the recommended offer for acceptance, a detailed explanation is required.*

*Comment on any savings achieved by the contract:*

* *Include information estimating the savings, which the recommended contract will achieve, otherwise state that the existing information base does not permit the calculation.*
* *Savings should relate to current market conditions or to prices being achieved by other agencies, not just compared to the last contract.*

*Comment on non-price factors and briefly note the non-price factors which contribute to value for money.*

*Referees - Indicate if referees were contacted and the findings, if applicable.*

*Financial viability - Indicate if the evaluation committee undertook an assessment of the financial capability of the preferred respondent by either taking into consideration:*

* *the financial data submitted by the respondent*
* *The financial report prepared by an independent financial analyst (if applicable).*

*Site visit - Document the reason for conducting any site visits and visit outcomes.*]

### Presentations

[Guide Note: Document whether any respondents were required to present their responses including details of any calcifications to their response.]

### Stage 3: Post RFx negotiation

[Guide Note: Document the outcomes of post RFx negotiations i.e. whether the objectives of the negotiation plan were achieved.]

### Stage 4: Completion

[Guide Note: Document the findings, supporting analysis and rationale for selecting or not selecting the respondents.]

# Recommendation from the evaluation Team

[Guide Note: Prepare a schedule of recommendation that addresses the following:

* Respondents recommended for acceptance for the goods/service arrangement. Where the preferred respondent is not the ‘lowest cost’ proposal, justification based on superiority and risk will be presented.
* Unsuccessful respondents including details of late responses.
* Sensitive issues affecting this arrangement.
* Any variations to the standard terms and conditions.
* Risk minimisation strategy outcomes delivered.]

The Evaluation Team has read, understood and endorses this Evaluation Report:

Recommended by:

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Title | Signature | Date |
| Name | Job Title, Organisation |  |  |
| Name | Job Title, Organisation |  |  |
| Name | Job Title, Organisation |  |  |
| Name | Job Title, Organisation |  |  |

# Appendix A – Evaluation Scores Spreadsheet

[Insert the evaluation score spreadsheet or provide as an attachment to this report.

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