# Drafting guidance

*[DRAFTING GUIDANCE: This template can be used to assist you in documenting the evaluation findings in your procurement process. The template has been developed specifically to help you record evaluation outcomes for responses to a request for tender (RFT) process. You will need to adapt this template to meet your specific project and the associated evaluation of responses to your procurement process.*

*You may also be able to adapt this template to:*

* *Document the evaluation findings of any evaluation sub-panels when undertaking your RFT evaluation; or*
* *Help you report on evaluation outcomes from a registration of interest or expression of interest phase if applicable to your procurement process.*

*Your Office of TAFE Coordination and Delivery (OTCD) representative can provide you with a sample tender evaluation scoring matrix should it be required.*

*Many components within this template will need to align with the evaluation criteria set out in your evaluation plan. Guidance on developing an evaluation plan can be found* ***here*** *[Link – Internal: “Planning for Tender Evaluation”].]*

# Introduction and purpose

*[This section should provide a brief introduction to the purpose of this evaluation report. You should ensure the reader is aware of which project this report is relevant to, the stage of procurement the evaluation is relevant to (i.e. EOI or RFT) as well as whether this report represents a sub-panel report or a consolidated final evaluation report.*

*You should also outline the key outcome your report is seeking (i.e. a shortlist of successful EOI respondents or preferred tenderer(s) to undertake negotiations with, etc.)]*

# Evaluation overview

## Evaluation governance:

*[This section should outline the governance for your evaluation including the role of your evaluation panel (and any sub-panels) in your procurement processes as well as the role of additional advisory parties (such as your specialist advisors) to the evaluation panel (or sub-panels). You may find it useful to present this information in a table similar to the one below. It is also useful to understand the approvals process beyond your evaluation panels for example the role of your project control group (PCG) or project steering committee (PSC) and other approving bodies. Guidance on approvals processes and governance structures can be found* ***here*** *[Link – Internal: “Project Governance”].]*

|  |  |  |
| --- | --- | --- |
| Name | Title | Role |
| *[Name]* | *[Title]* | *[Role]* |
| *[Name]* | *[Title]* | *[Role]* |
| *[Name]* | *[Title]* | *[Role]* |

## Evaluation process

*[This section should outline the evaluation process undertaken. This should have been articulated as part of your evaluation plan. Guidance on what to include in an evaluation plan can be found* ***here*** *[Link – Internal: “Planning for Tender Evaluation”].]*

## Key milestones

*[This section should outline key milestones in the procurement process such as release to market, interactive tender sessions etc. It should also detail your proposed internal project management timeframes for the evaluation process, including the preparation of draft panel, sub-panel and advisory reports (if relevant) and how these fit within scheduled meetings of approving bodies (i.e. steering committees, board committees and cabinet committees (where relevant)).]*

# Tenders received

*[This section should outline the tenders received and the status of the tenders. You may find it useful to present this information in a table similar to the one below.*

|  |  |  |  |
| --- | --- | --- | --- |
| Tenderer | Compliant [Y/N?] | Withdrew [Y/N?] | Comments |
| *[Name]* | *[Y/N]* | *[Y/N]* | *[Comments]* |
| *[Name]* | *[Y/N]* | *[Y/N]* | *[Comments]* |
| *[Name]* | *[Y/N]* | *[Y/N]* | *[Comments]* |
| *[Name]* | *[Y/N]* | *[Y/N]* | *[Comments]* |
| *[Name]* | *[Y/N]* | *[Y/N]* | *[Comments]* |

*You should also highlight any late submissions you received and how you decided to treat them in line with your evaluation plan. Guidance on what to include in an evaluation plan can be found* ***here*** *[Link – Internal: “Planning for Tender Evaluation”].*

*You may also wish to provide an overview of clarification responses received from each tenderer during the evaluation process and how these have been considered in your Evaluation.]*

# Evaluation

*[This section should present a summary of the analysis of all tenders across each evaluation criteria. You may wish to start by evaluating the pass/fail criteria first using a table similar to the one below.*

|  |  |  |  |
| --- | --- | --- | --- |
| Tenderer | Pass/Fail Criteria 1 | Pass/Fail Criteria 2 | Compliant |
| *[Tenderer]* | *[Compliant/Non-Compliant]* | *[Compliant/Non-Compliant]* | *[Y/N]* |
| *[Tenderer]* | *[Compliant/Non-Compliant]* | *[Compliant/Non-Compliant]* | *[Y/N]* |
| *[Tenderer]* | *[Compliant/Non-Compliant]* | *[Compliant/Non-Compliant]* | *[Y/N]* |
| *[Tenderer]* | *[Compliant/Non-Compliant]* | *[Compliant/Non-Compliant]* | *[Y/N]* |

*You will also need to include an evaluation of* ***mandatory evaluation criteria and associated weightings*** *[Link – Internal: “Preparing for Tender Evaluation”] which may relate to requirements under* ***Local Jobs First Policy***[Link – Internal: “Local Jobs First Policy Compliance”]*,* ***Social Procurement Framework***[Link – Internal: “Social Procurement Framework”] *and* ***Occupational Health and Safety***[Link – Internal: “Occupation Health and Safety Act”]*.*

*Additional detail of the analysis should be included with the appendices or, if relevant, sub-panel evaluation reports. You may wish summary the overall results of your evaluation using a table similar to the one below.]*

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Tenderer | Technical  | Commercial / Legal | Price | Value for Money | Overall |
| *[Tenderer]* | *[Rank]* | *[Rank]* | *[Price]* | *[Commentary on Value for Money]* | ***[Rank]*** |
| *[Tenderer]* | *[Rank]* | *[Rank]* | *[Price]* | *[Commentary on Value for Money]* | ***[Rank]*** |
| *[Tenderer]* | *[Rank]* | *[Rank]* | *[Price]* | *[Commentary on Value for Money]* | ***[Rank]*** |
| *[Tenderer]* | *[Rank]* | *[Rank]* | *[Price]* | *[Commentary on Value for Money]* | ***[Rank]*** |

## Technical evaluation summary

*[This section should provide an overview of your technical evaluation criteria. You will need to repeat the sub-headings below for each evaluation criteria.]*

### Evaluation of technical criteria 1

*[This section should outline the evaluation criteria and present and analysis of the relative strengths and weaknesses of each tenderer’s response in respect the evaluation criteria. You may find it useful to present this information in a table similar to the one below.]*

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Tenderer | Strengths | Weaknesses | Rating | Weighting |
| *[Tenderer]* | *[Strengths]* | *[Weaknesses]* | *[Rating]* | *[Weighting of relative importance]* |
| *[Tenderer]* | *[Strengths]* | *[Weaknesses]* | *[Rating]* | *[Weighting of relative importance]* |
| *[Tenderer]* | *[Strengths]* | *[Weaknesses]* | *[Rating]* | *[Weighting of relative importance]* |
| *[Tenderer]* | *[Strengths]* | *[Weaknesses]* | *[Rating]* | *[Weighting of relative importance]* |

### Evaluation of technical criteria 2

*[This section should outline the evaluation criteria and present an analysis of the relative strengths and weaknesses of each tenderer’s response in respect of the evaluation criteria. You may find it useful to present this information in a table similar to the one below.]*

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Tenderer | Strengths | Weaknesses | Rating | Weighting |
| *[Tenderer]* | *[Strengths]* | *[Weaknesses]* | *[Rating]* | *[Weighting of relative importance]* |
| *[Tenderer]* | *[Strengths]* | *[Weaknesses]* | *[Rating]* | *[Weighting of relative importance]* |
| *[Tenderer]* | *[Strengths]* | *[Weaknesses]* | *[Rating]* | *[Weighting of relative importance]* |
| *[Tenderer]* | *[Strengths]* | *[Weaknesses]* | *[Rating]* | *[Weighting of relative importance]* |

## Commercial / legal

*[This section should provide an overview of your commercial / legal evaluation. You will need to repeat the subheadings below for each evaluation criteria. You should also outline a rating of each tenderer’s finance capacity to deliver the project. To determine this rating, input from a financial capacity analysis report is likely needed – you may wish to append this to your evaluation report. Furthermore, you should also outline any proposed legal departures that tenderers have responded with and your assessment of these requests.]*

### Evaluation of commercial criteria 1

*[This section should outline the evaluation criteria and present an analysis of the relative strengths and weaknesses of each tenderer’s response in respect the evaluation criteria. You may find it useful to present this information in a table similar to the one below.]*

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Tenderer | Strengths | Weaknesses | Rating | Weighting |
| *[Tenderer]* | *[Strengths]* | *[Weaknesses]* | *[Rating]* | *[Weighting of relative importance]* |
| *[Tenderer]* | *[Strengths]* | *[Weaknesses]* | *[Rating]* | *[Weighting of relative importance]* |
| *[Tenderer]* | *[Strengths]* | *[Weaknesses]* | *[Rating]* | *[Weighting of relative importance]* |
| *[Tenderer]* | *[Strengths]* | *[Weaknesses]* | *[Rating]* | *[Weighting of relative importance]* |

**Financial capacity**

*[This section should outline the financial capacity of each tenderer to deliver the project and highlight any key risks that may be relevant. This section should be situated under the relevant evaluation criteria which seeks to understand tenderer financial capacity.*

*A full financial capacity assessment of each tenderer should be presented in a standalone report.]*

|  |  |  |
| --- | --- | --- |
| Tenderer | Financial Capacity Rating | Comments |
| *[Tenderer]* | *[Rating]* | *[Comments]* |
| *[Tenderer]* | *[Rating]* | *[Comments]* |
| *[Tenderer]* | *[Rating]* | *[Comments]* |
| *[Tenderer]* | *[Rating]* | *[Comments]* |

### Evaluation of commercial criteria 2

*[This section should outline the evaluation criteria and present an analysis of the relative strengths and weaknesses of each tenderer’s response in respect the evaluation criteria. You may find it useful to present this information in a table similar to the one below.]*

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Tenderer | Strengths | Weaknesses | Rating | Weighting |
| *[Tenderer]* | *[Strengths]* | *[Weaknesses]* | *[Rating]* | *[Weighting of relative importance]* |
| *[Tenderer]* | *[Strengths]* | *[Weaknesses]* | *[Rating]* | *[Weighting of relative importance]* |
| *[Tenderer]* | *[Strengths]* | *[Weaknesses]* | *[Rating]* | *[Weighting of relative importance]* |
| *[Tenderer]* | *[Strengths]* | *[Weaknesses]* | *[Rating]* | *[Weighting of relative importance]* |

**Legal departures**

*[This section should outline proposed legal departures from tenderers as well as their significance, your plan to resolve them and your plan to address them. This section should be situated under the relevant evaluation criteria which seeks to understand the tenderers ability to accept the commercial arrangements of the project]*

|  |  |  |
| --- | --- | --- |
| Tenderer | Proposed Legal Departures | Comments |
| *[Tenderer]* | *[Proposed legal departures]* | *[Comments]* |
| *[Tenderer]* | *[Proposed legal departures]* | *[Comments]* |
| *[Tenderer]* | *[Proposed legal departures]* | *[Comments]* |
| *[Tenderer]* | *[Proposed legal departures]* | *[Comments]* |

### Evaluation of commercial criteria 3

*[This section should outline the evaluation criteria and present an analysis of the relative strengths and weaknesses of each tenderer’s response in respect the evaluation criteria. You may find it useful to present this information in a table similar to the one below.]*

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Tenderer | Strengths | Weaknesses | Rating | Weighting |
| *[Tenderer]* | *[Strengths]* | *[Weaknesses]* | *[Rating]* | *[Weighting of relative importance]* |
| *[Tenderer]* | *[Strengths]* | *[Weaknesses]* | *[Rating]* | *[Weighting of relative importance]* |
| *[Tenderer]* | *[Strengths]* | *[Weaknesses]* | *[Rating]* | *[Weighting of relative importance]* |
| *[Tenderer]* | *[Strengths]* | *[Weaknesses]* | *[Rating]* | *[Weighting of relative importance]* |

## Price summary

*[This section should provide an overview of your price evaluation. Pricing evaluation will vary greatly between projects, broadly, you should include a summary of the total price submitted by tenderers, net present value (if relevant), pricing risks, and risk adjusted pricing (if applicable) as well as a sensitivity analysis on any key assumptions. You may wish to provide additional details of your pricing analysis, including a breakdown of cost components, with the appendices.]*

## Risks and issues for resolution

*[This section should outline any risks identified in tenderers’ responses, whether the risks or issues identified through the evaluation process should be resolved through the negotiation process.]*

# Recommendation and next steps

*[In this section, you should outline the recommendation of your evaluation panel. Recommendations should also include your proposed strategy for resolving any outstanding issues and progressing to contractual close. This could include:*

* *Selecting a short list of respondents to proceed to the request for tender stage (relevant only if you are using this template to record the evaluation of EOI and ROI responses);*
* *Selecting a preferred tenderer;*
* *Entering into negotiations with one or more parties; or*
* *Issuing a best and final offer (BAFO) request (noting this is recommended where solutions are generally not capable of being accepted even after entering into a competitive structured negotiations phase).]*

# Evaluation Panel [Chair / Member Endorsement]

|  |  |
| --- | --- |
|  | by: |
| Name: | *[First Name Last Name]* |  | **Name:** | *[First Name, Last Name]* |
| Position: | *[Position]* |  | **Position:** | *[Position]* |
| Signature: | *[Sign Here]* |  | **Signature:** | *[Sign Here]* |
| Date: | *[dd-mmm-yy]* |  | **Date:** | *[dd-mmm-yy]* |

Appendices

# Detailed Assessment

*[This section should outline a detailed assessment of each tenderer’s responses. You may find it useful to use the tables below. Each section below will need to be repeated for each tenderer.]*

## [Tender 1]

### Technical evaluation

| Technical Evaluation |
| --- |
| Overall Technical Rating | *[Rating]* |
| Criteria 1 |
| *[Overview]* |
| Strengths | Weaknesses |
| *[Strengths]* | *[Weaknesses]* |
| Rating | *[Rating]* |
|  |
| Criteria 2 |
| *[Overview]* |
| Strengths | Weaknesses |
| *[Strengths]* | *[Weaknesses]* |
| Rating | *[Rating]* |
|  |
| Criteria 3 |
| *[Overview]* |
| Strengths | Weaknesses |
| *[Strengths]* | *[Weaknesses]* |
| Rating | *[Rating]* |

### Commercial / legal evaluation

| Commercial / Legal Evaluation |
| --- |
| Overall Commercial / Legal Rating | *[Rating]* |
| Criteria 1 |
| *[Overview]* |
| Strengths | Weaknesses |
| *[Strengths]* | *[Weaknesses]* |
| Rating | *[Rating]* |
|  |
| Criteria 2 |
| *[Overview]* |
| Strengths | Weaknesses |
| *[Strengths]* | *[Weaknesses]* |
| Rating | *[Rating]* |
|  |
| Criteria 3 |
| *[Overview]* |
| Strengths | Weaknesses |
| *[Strengths]* | *[Weaknesses]* |
| Rating | *[Rating]* |

### Pricing evaluation

*[This section should provide details of your price evaluation. Pricing evaluation will vary greatly between projects, broadly, you should include analysis of the total price submitted by the tenderer, net present value (if relevant), pricing risks, risk adjusted pricing (if applicable), a breakdown of cost components as well as a sensitivity analysis on any key assumptions.]*

### Summary

| Summary |
| --- |
| *[Provide a high-level summary of the tenderer’s submission based of their response to your evaluation criteria]* |

### Risks and issues

| Risks and Issues |
| --- |
| *[Highlight any key risks, issues and/or concerns the evaluation panel has with this submission. Also include any follow-on items that need to be considered during negotiation.]* |

### Referee summary

| Referee Summary |
| --- |
| *[Provide a summary of referee comments and an assessment of the level of support or concern each referee had. Remember to associate the comments with the specific referee. In the event that the vendor is an incumbent, an assessment of performance by the department should also be included.]* |

### Special requirements

| Special Requirements |
| --- |
| *[Provide details about any special requirements that need to be considered by the delegate.]* |

# Evaluation advisors

The following people provided business and technical assistance and/or advice to assist with the evaluation:

|  |  |  |
| --- | --- | --- |
| Name | Role | Assistance Provided |
| *[Name]* | *[Role]* | *[Description of assistance provided]* |
| *[Name]* | *[Role]* | *[Description of assistance provided]* |
| *[Name]* | *[Role]* | *[Description of assistance provided]* |

# References

The following documentation provides additional detail in support of this evaluation:

|  |  |  |
| --- | --- | --- |
| Document Name | Document ID | Comments |
| *[Document Name]* | *[ID Number]* | *[Comments]* |
| *[Document Name]* | *[ID Number]* | *[Comments]* |
| *[Document Name]* | *[ID Number]* | *[Comments]* |

# Supporting reports

*[You may wish to append specific advisory reports to this evaluation report that have supported this evaluation report or its corresponding sub-panel evaluation reports.]*