

Commercial and Procurement Services

Evaluator and Consensus Training

Course objectives

- The core principles of procurement
- The selection and award criteria of the procurement process
- The role and commitment as an evaluator and the risks and consequences of not evaluating in accordance with these principles
- How to apply objective scoring methodology
- How and where to record your scores
- The importance of concise, clear and comprehensive comments
- Consensus meeting protocol

Core procurement principles

- Competition
- Equal treatment and non-discrimination
- Fairness and transparency
- Achieve Best Value
- Comply with Contract Standing Orders
- Integrity
- Accountability

Selection and award criteria within the procurement process

- The tender submission is made up of
 - SPD (Single Procurement Document) - Selection
 - A written technical submission – Quality
 - A commercial submission – Cost
- Cost:Quality ratio (out of 100%)
 - % of the award criteria allocated to quality
 - % of the award criteria allocated to cost

Procurement Process

- Individual assessment
- Submit scores and comments to CPS
- Highlight any areas of concern/clarification to CPS
- Discussion of individual scoring carried out at the consensus meeting
- Preferred tenderer(s) identified
- Award recommendation report approved
- Award to successful tenderer(s) and provide feedback to unsuccessful tenderer(s)

Declaration of Confidentiality and Absence of Conflict of Interest and Bribery Statement

- Be open and honest about any conflicts of interest
- Be independent
- Be aware of the procurement risks and consequences
- Maintain confidentiality of the tenderers assessment and process at all times

Tender evaluation pack

The evaluation pack will be emailed to you by the procurement lead and will contain:

- Specification (including KPI's)
- Tenderers submission(s) and any additional material requested as part of the submission
- Tender clarification Q&A
- Individual evaluation matrix

Individual Evaluation

- Be committed to achieving deadlines
- Focus only on the scoring methodology for every question
- Evaluate in an unbiased, fair, honest and transparent manner

Scoring methodology

Assessment	Score	Interpretation
Excellent	4	Response is completely relevant and excellent overall. The response is comprehensive, unambiguous and demonstrates a thorough understanding of the requirement and provides details of how the requirement will be met in full.
Good	3	Response is relevant and good. The response is sufficiently detailed to demonstrate a good understanding and provides details on how the requirement will be fulfilled.
Acceptable	2	Response is relevant and acceptable. The response addresses a broad understanding of the requirement but may lack details on how the requirement will be fulfilled in certain areas.
Poor	1	Response is partially relevant but generally poor. The response addresses some elements of the requirement but contains insufficient/limited detail or explanation to demonstrate how the requirement will be fulfilled.
Unacceptable	0	Nil or inadequate response. Fails to demonstrate an ability to meet the requirement.

Recording of scores and comments

	Award Criteria	Score 0 - 4	Where meets criteria	Where does not meet criteria	Questions/ Comments
1	Effective Training Delivery				
2	Ongoing Workshops				
3	Resources				
4	Quality				
5	Contract Performance Management				
6	Business Continuity				

Evaluator scoring and comments

- Scoring must be comprehensive, fair and unbiased
- Comments should not be related to anything other than the tenderers submission e.g. no prior knowledge of the organisation
- The comments must be legible and in an electronic form
- You must be willing to discuss your comments at the consensus meeting
- You must assess the tenderer against the scoring methodology, not against other tenders
- The comments will form the debrief to unsuccessful tenderers – inaccurate information or failure to evaluate fairly may result in a procurement challenge
- The final consensus matrix may be subject to release by Court Order
- Best Practice should eliminate and mitigate any risk to the evaluation process

Unsatisfactory examples of comments

- “Lacked innovation” ... what did?
- “Comprehensive answer” ... which particular elements?
- “Did not answer the question” ... why not?
- “Good response” ... what was?
- “What, which, why?”
 - What was missing? What did you like? Which particular elements were good? What was unclear?
- It is important to be specific when recording comments within the individual evaluation matrix

Unacceptable example

	Award Criteria	Score 0 - 4	Where meets criteria	Where does not meet criteria	Questions/Comments
1	Effective Training Delivery	4	Detailed information		
2	Ongoing Workshops	3	Good description	None	
3	Resources	2	Partial knowledge of requirements	No staffing levels	
4	Quality	3	Shows understanding of what is required	None	
5	Contract Performance Management	4	Detailed information in reports		
6	Business Continuity	2	Lacking in detail, overall a poor response	Mentions Business Continuity plan but not defined	

Exemplar

	Award Criteria	Score 0 - 4	Where meets criteria	Where does not meet criteria	Questions/Comments
1	Resources	2	Good information provided regarding the lead resource and direct support, the roles were fully detailed.	Limited detail around other members of staff who would be involved in this project and the overall support required to fulfil the contract.	Scored 2 as the answer addresses a broad understanding
2	Contract Performance Management	4	The response demonstrates a clear plan for monitoring the delivery of the contract. This includes highlighting any issues with training uptake with the Council. There is a plan for addressing poor performance and disputes involving a contextual approach.	None	
3	Business Continuity	3	Due consideration has been given to potential challenges in business continuity and alternative plans are in place to address those, this includes resource and loss of IT.	The response would have benefitted from further detail regarding for loss of premises and the contingency arrangements.	Clarify that premises are detailed in the business continuity plan?

Consensus meeting protocol

- Meeting arrangements
- Evaluator responsibilities
- Individual and panel discussion
- Clarifications
- Consensus evaluation matrix sign off
- Evaluation outcome
- Feedback
- Confidentiality

Frequently asked questions



For further information please email:

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