



Procurement Training

EVALUATION & AWARD

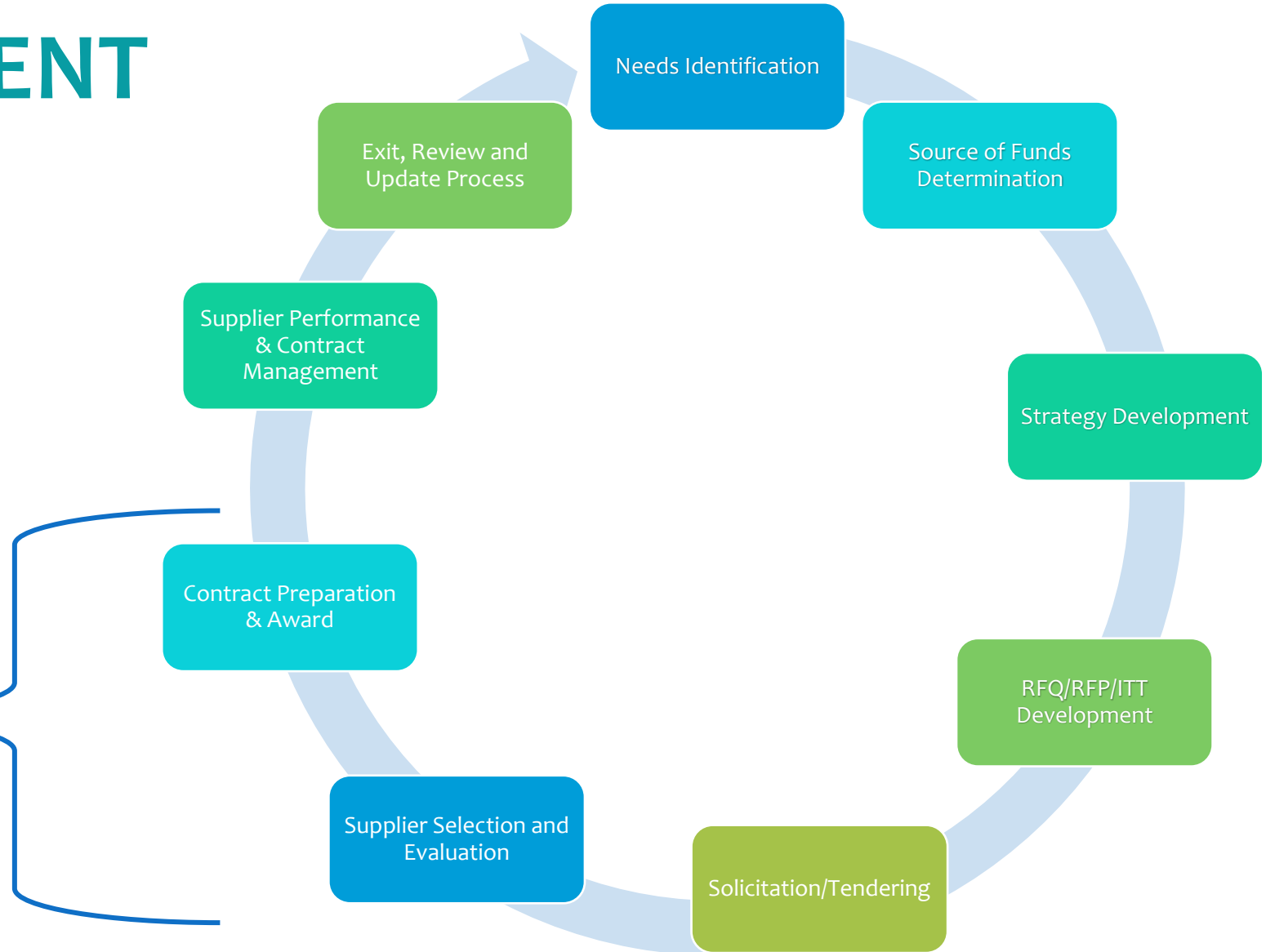
Presented by: The Procurement Unit

15/02/2022

3

PROCUREMENT CYCLE

Evaluation and Award



Tender/Bid/Proposal Evaluation: What is it?

It is a process that allows for measuring and assessing all valid submissions received.

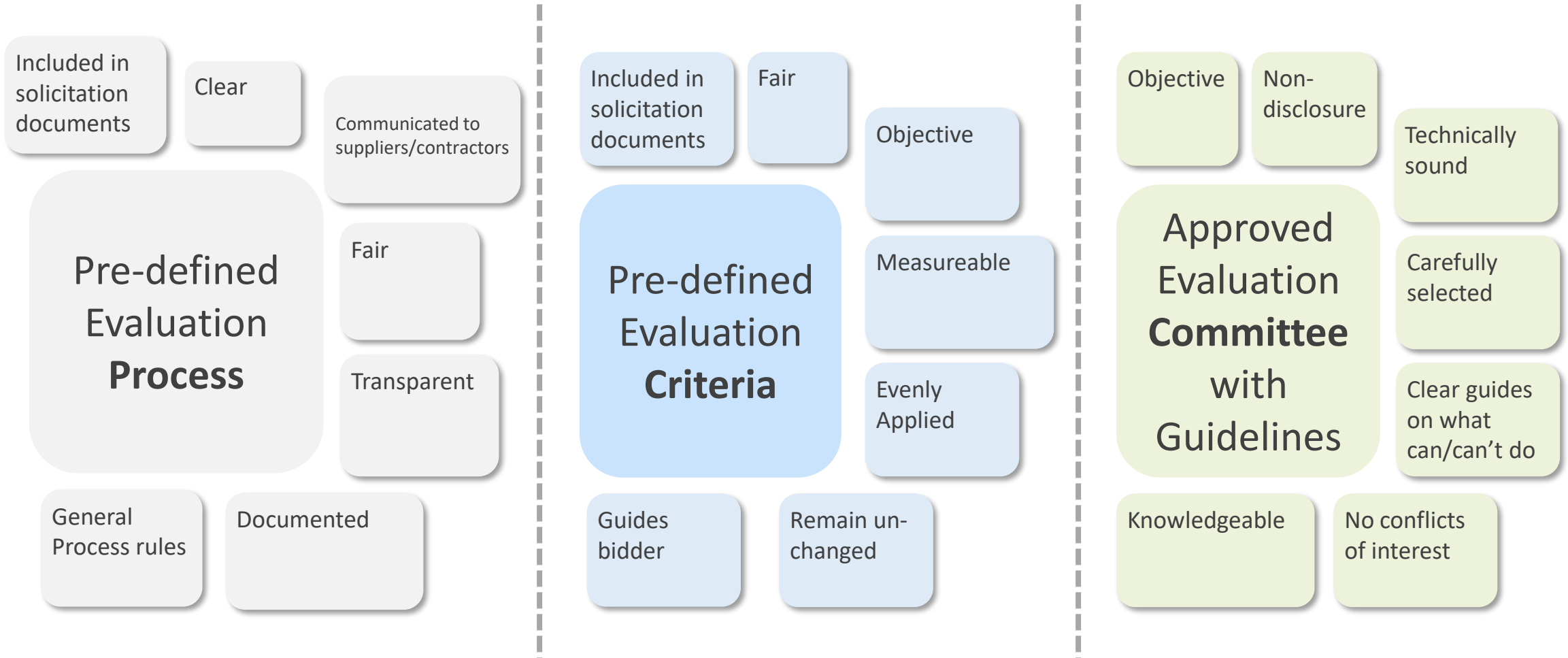
Whether the solicitation document used was a RFQ, RFP or, ITT it is **imperative** that all valid submissions received are assessed or evaluated in a **clear, systematic, objective** and **transparent** manner.

The AIM at the end of the evaluation, is to identify and recommend the **most suitable** supplier/contractor to provide the goods/works/services.

**WHERE IN THE
PROCUREMENT
CYCLE IS THE
EVALUATION
PROCESS
ADDRESSED?**

- The actual evaluation exercise occurs after tenders or bids are opened.
- It is planned for and mapped out during the procurement planning stage.
- The method, criteria and committee are agreed upon in advance.

COMPONENTS OF A COMPREHENSIVE TENDER EVALUATION PROCESS



WHAT VALUE OF GOODS/WORKS/SERVICES REQUIRES AN EVALUATION?

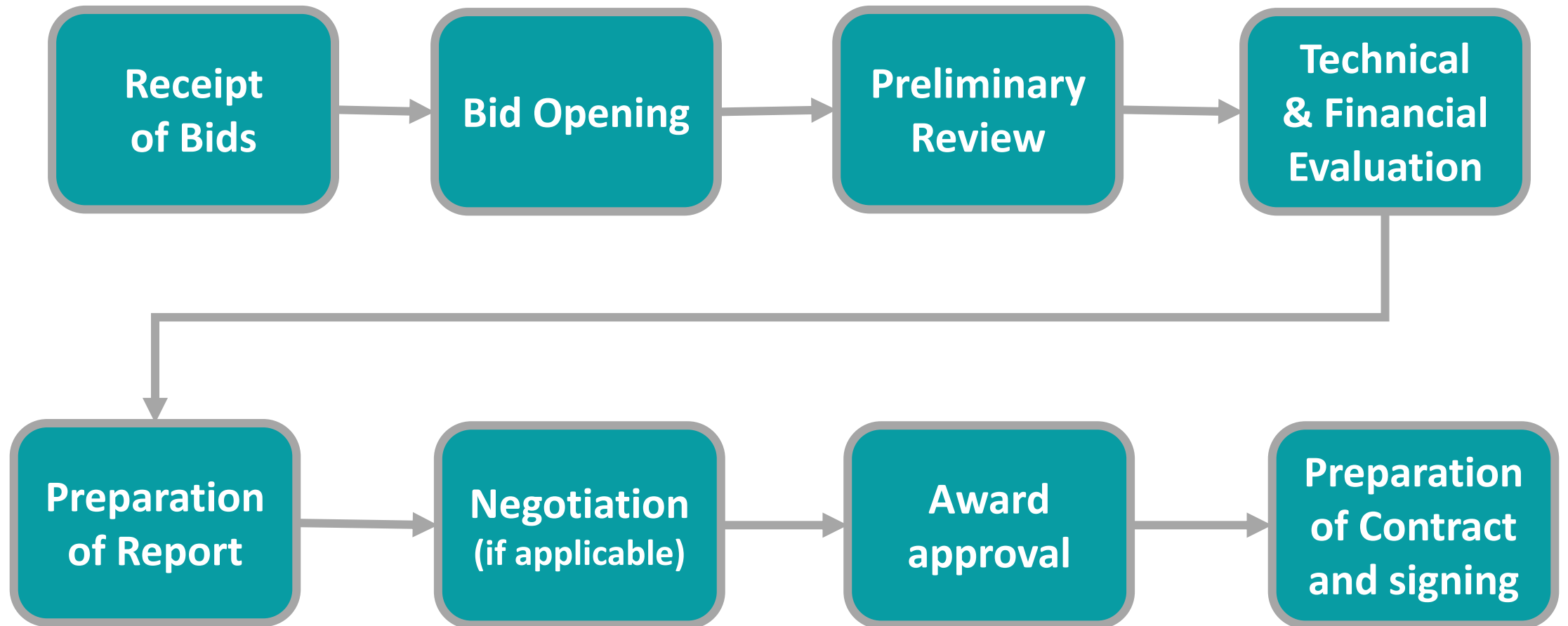
The simple answer is ALL.

- ✓ low-valued, low-risk good and services = a simple evaluation process is required
- ✓ For high-valued, high-risk goods/works/services = detailed and rigorous evaluation process is needed

What will vary

- ✓ The mix & skills of persons comprising the Evaluation Committee
- ✓ The evaluation method and criteria used
- ✓ Documenting and reporting on the process and results by the Evaluation Committee
- ✓ Delegated authority to approve the recommendation for award

EVALUATION PROCESS



**THE BID OPENING
IS THE FIRST PART
OF THE EVALUATION PROCESS**

BID OPENING COMMITTEE

For all procurement executed by the Special Purpose PEAs (CPO, DFM, CITS*)

- Bursary Representative
- Dept./PEA Representative
- Administrative Support

For all procurement executed by the Faculty/Dept./Unit/Office

- HOD or Designate
- Other Dept. Representative (Procurement or Administrative)

BID OPENING COMMITTEE

The Bid Opening Committee is responsible for:

- Maintaining the integrity of the opening
- The physical opening of the tender box and bids
- Recording the information

The Bid Opening Committee should be present at all bid openings

The Bid Opening Committee should be appointed prior to the opening

CONDUCT OF THE BID OPENING

- Bids should be opened within ½ half hour of receipt
- Meeting should be conducted in a professional manner
- All persons in attendance must sign the **Bid Opening Attendance Register**
- The Bid Opening Chair should announce that all tenders received are subject to evaluation prior to any recommendation for award
- Allow questions to be asked after bid packages have been opened and logged so as to not interrupt the physical opening

WHAT SHOULD WE CHECK FOR WHEN OPENING BIDS?

Some documents will be considered mandatory upon initial opening of the tender packages. This may include:

- Completed and signed Bid Form
- Completed and signed Cover Letter
- Bid Security (if applicable)
- Any other documents that was stated as “mandatory” in the solicitation document

A checklist should be developed to inform the Bid Opening Committee of all mandatory documents.

OPENING THE TENDER BOX

- Locks should be opened by the two key holders in view of designated observer(s).
- All bids when opened should be recorded in the **Bid Package Opening Register**.

OPENING THE BID PACKAGES

Single Envelope Process

- The bid packages are removed from the tender box and opened one at a time.
- When opened, the name of the supplier/contractor who submitted the bid is announced.
- The number of packages submitted is documented in the Bid Package Opening Register.
- The Cover Letter and or Bid Form is examined for completeness, authorized signature and company stamp.

OPENING THE BID PACKAGES

Single Envelope Process cont'd

- The bid price is then announced and documented in the **Bid Package Opening Register**
- The Bid Form is stamped and signed by the Bid Opening Committee.
- The Bid Security and other mandatory documents (where applicable) are confirmed as having been submitted and documented in the Register
- After recording all bids in the Bid Package Opening Register, the register must be signed by the authorised signatories.

OPENING THE BID PACKAGES

TWO Envelope Process

- Both the Technical and Financial Packages are removed from the tender box.
- The number of technical and financial packages submitted is documented in the Register
- The original technical proposal package is opened and the name of the person or company who submitted the bid is announced

OPENING THE BID PACKAGES

TWO Envelope Process cont'd

- The Cover Letter is examined for completeness, authorised signature and company stamp.
- The Cover Letter is stamped and signed by the Bid Opening Committee.
- Other technical mandatory documents are confirmed as submitted and documented in the Bid Package Opening Register.

OPENING THE BID PACKAGES

TWO Envelope Process CONT'D

- The envelope containing the original financial package is stamped and signed by the authorized signatories.
- The **Bid Package Opening Register** is then completed and signed by The UWI Designates.
- Packages are placed aside and the process is completed until all the packages are removed.

OPENING THE BID PACKAGES

What happens after packages are opened?

- The empty tender box is shown to the attendees/observers
- The floor is opened for questions and the meeting is closed
- Packages are moved to a secure location until the evaluation or immediately handed over to the Evaluation Committee Chairman to start the evaluation.
- Before distributing packages to committee, ensure to record in Bid Distribution Log

OPENING BIDS SUBMITTED BY HAND

- Bid packages should be double checked against the **Bid Submission Register** to confirm all bids submitted are accounted for before being carried to the opening meeting.
- All bids when opened should be recorded in the **Bid Package Opening Register**.
- Follow the remaining processes for single and two envelope submissions

OPENING BIDS SUBMITTED VIA EMAIL

- Emails should only be opened on the bid submission deadline date
- Confirm that all emails opened against the **Bid Submission Register** to ensure that all bids submitted are accounted for
- All bids when opened should be recorded in the **Bid Package Opening Register**.
- Emails should be printed and attached to either of the Registers as proof of its submission

WHAT MAY BE CONSIDERED A NON-COMPLIANT BID PACKAGE?

1. Does not adhere to the instructions outlined in the solicitation document.
2. Failure to submit on or before deadline date and time
3. Fails to contain mandatory documents outlined in the solicitation document
4. Cover Letter/Bid Form is incomplete, not signed or not submitted.

Note:

1. Non-compliant proposals at the bid opening should be documented for further review.
2. The Evaluation Committee will conduct a preliminary examination of bids at start of evaluation to determine responsiveness/compliance
3. Any recommendation to disqualify must be brought to the attention of the Procurement Manager who shall consult with the Campus Legal Officer as necessary.
4. Bidders should not be notified of disqualification until the Evaluation Report has been reviewed by CPC and approved by the relevant approval authority.

EVALUATION COMMITTEE

ROLE AND RESPONSIBILITIES OF THE EVALUATION COMMITTEE CHAIRMAN

To lead the evaluation and make recommendations to the HOD or other relevant approval authority on the award of suitable suppliers/contractors.

To conduct inception meeting with committee members

Communicate with members of the date, time and location of evaluation meetings

Clarify each member's role on the committee

Organize and manage the evaluation process

Ensure evaluation is conducted in accordance with RFQ/RFP/ITT requirements

To review and discuss the relevant requirements so that all members can be guided accordingly

Safe keeping, distribution and collection of the RFQ/RFP/ITT and proposals

Ensures Non-Conflict of Interest and Confidentiality Forms are issued and signed off by members prior to meeting

Preparation and submission of the evaluation report

Present recommendation to relevant approval authority

ROLE AND RESPONSIBILITIES OF THE EVALUATION COMMITTEE MEMBERS

The Evaluation Committee's primary responsibility is to make recommendations to the relevant approval authority on the award of a suitable supplier/contractor to provide The UWI with required goods, services and works.

To declare conflict of interest

Perform preliminary checks

Evaluate quotes/tenders in accordance with stated evaluation criteria

Document justifications for each individual score

Maintain confidentiality, transparency, integrity and fairness

CONFLICT OF INTEREST AND CONFIDENTIALITY

All staff involved in the evaluation of procurement activities are required to declare any conflict of interest they may have with a supplier/contractor and to maintain the confidentiality of all bids during and after the bid evaluation process.

Staff are also required to conduct procurement activities in accordance with the ethics principles enshrined in the Procurement Legislation, The UWI STA's Procurement Manual, Financial Code and Procedures

THE EVALUATION PROCESS

INCEPTION MEETING OF THE EVALUATION COMMITTEE

Importance of Inception meeting:

- Chairperson designated (if not done prior)
- Ensure evaluation packages are received and non-conflict of interest & confidentiality agreements are signed
- Discuss roles and responsibilities of Committee members
- Ensure consensus on the interpretation of technical specification, evaluation criteria and conformity of bids



INCEPTION MEETING OF THE EVALUATION COMMITTEE

Importance of Inception meeting:

- Finalise score sheets
- Set clear rules and guidelines on how to treat with disparities, recording of information, discussions, etc.
- Set dates: review of bids, deadline for submission, progress review meetings if needed, reference checks, presentations, clarifications



SETTING THE VARIATION TOLERANCE

When using a 1-to-10 scale, the variation tolerance can be set at three points apart

When using a 1-to-5 scale, the variation tolerance can be set at two points apart

Note: *Reasons for the variation must be specified and supported by a logical explanation which should be included in the evaluation report.*

VARIATION TOLERANCE

Is it okay to have different scores in an evaluation?

It is acceptable to have differing scores, however, a wide disparity can be an indicator that:

1. An evaluator may have missed critical information which was submitted.
2. Different interpretation of same criteria
3. There may be a possible bias

TECHNICAL EVALUATION PHASE 1 – PRELIMINARY REVIEW

PRELIMINARY REVIEW

Bids are usually evaluated against mandatory criteria first. Suppliers/Contractors who fail to submit mandatory criteria are usually eliminated at this point.

Mandatory criteria are rated as either:

- pass/fail
- responsive/non-responsive
- compliant/non-compliant

CONDUCTING PRELIMINARY CHECKS

Preliminary checks can assess:

- Mandatory criteria
- Statutory compliance
- Validity of the bid, for example, signatures, information, figures, etc.
- Eligibility in the event of Selective Tender or Pre-qualification
- Bid Security (If applicable)
- Completeness and responsiveness of bid

PRELIMINARY REVIEW

Documentation of the Preliminary Checks

- The results should be properly documented
- Reasons for disqualified bids must be clearly explained in the evaluation report

Note: *It may be useful to include additional tables for itemization of responsiveness.*

Guidance can be sought from the Procurement Unit if any ambiguity arises

REASONS FOR DISQUALIFICATION AFTER PRELIMINARY CHECKS

Non-Responsiveness of Proposals

A proposal may be disqualified at this point if:

1. It substantially deviates from the areas outlined in the preliminary checklist or
2. A mandatory requirement is not submitted.

REASONS FOR DISQUALIFICATION AFTER PRELIMINARY CHECKS

Non-Responsiveness of Proposals

It is recommended that bids are disqualified only when the deviation to the requirements is material.

However, the Evaluation Committee must be able to differentiate between the material and non-material deviation from the requirements.

Any decisions to disqualify should not be communicated to the bidders during the process.

WHAT IS A MATERIAL DEVIATION?

Where the bidder's response does not substantially respond to the RFP requirements or has a potentially significant effect on the delivery, quantity or quality of items proposed, amount paid to the vendor or on the cost to The UWI.

Material deviations cannot be waived.

Source: UN Procurement Practitioner's Handbook

WHAT IS A MATERIAL DEVIATION?

A material deviation is one that:

- Would affect the scope, quality, or performance of the goods and related services specified in the contract
- Would limit in any substantial way, the organisation's rights or the bidder's obligations under the contract
- If rectified would unfairly affect the competitive position of other bidders presenting substantially responsive offers

Source: UN Procurement Practitioner's Handbook

WHAT IS A MATERIAL DEVIATION?

Examples of Material Deviations

- Stipulating price adjustment when fixed price bids were called for
- Failing to respond to specifications by offering a different design or product that does not offer substantial equivalence in critical performance parameters or in other requirements
- Phasing of contract start-up, delivery, installation, or construction not conforming to required critical dates or progress markers

WHAT IS A MATERIAL DEVIATION?

Examples of Material Deviations cont'd

- Subcontracting other than the terms and conditions stipulated in the solicitation document
- Refusing to bear important responsibilities and liabilities allocated in the bidding documents, such as performance guarantees and insurance coverage
- Taking exception to critical provisions such as applicable law, taxes and duties, and dispute resolution procedures in the draft contract

WHAT IS A NON-MATERIAL DEVIATION?

A non-material deviation is:

Any deviation other than those listed prior and where the missing documents requested are deemed historical to the bidder.

For example:

- Minor amendments to the contract terms and conditions which are acceptable
- Arithmetic errors that can be corrected
- Catalogues
- Statutory documents and Financial statements

**ONCE PRELIMINARY CHECKS
ARE COMPLETED YOU CAN
NOW MOVE ON TO PHASE 2
OF THE TECHNICAL EVALUATION**



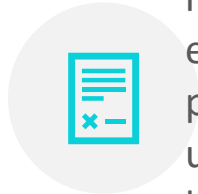
Under NO circumstances should a new or revised evaluation method, criteria or weighting be introduced during the evaluation of bids.

The Evaluation Committee shall select the successful bidder based only on the evaluation criteria and methodology specified in detail in the bidding documents.

WHAT TO EVALUATE?



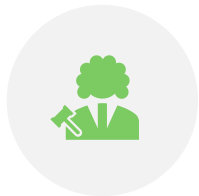
Only the information contained in the bids can be considered for the evaluation process. Do not alter any criteria after the receipt of bids.



Where bidders fail to submit requested information, evaluators should not rely on personal opinions or draw upon past experiences with bidders as a basis for assigning scores.



Scores should be applied equally especially when using a qualitative process



Bidders should be objectively evaluated as per the contents of their bids even where evaluators are not personally convinced about its veracity.



Issues may be resolved through reference checks, post bid clarifications and site visits if it relates to past experiences, qualifications, and resources as part of a due diligence process during the evaluation.

TECHNICAL EVALUATION

At this stage the Committee evaluates and scores submissions according to the specifications and requirements defined in the RFQ/RFP/ITT

Evaluation, together with the requirement definition and the evaluation criteria and method specified in the solicitation document, are the basis for the subsequent selection of the offer that provides the best value for money for the organization.

EVALUATION METHODS

Technical Evaluation for Lowest Priced Compliant Acceptable Offer

Once bids have been checked to confirm that they met the minimum specifications or requirements, the contract is awarded to the lowest priced submission.

Minimum requirements may include:

- Minimum specifications
- Quantities
- Delivery time and location
- Payment terms

Technical Evaluation for Weighted Scoring Method

Bids are assessed using a variety of objective and non-discriminatory criteria to identify the bid which is best value for money.

Technical proposals are firstly evaluated to determine its responsiveness or compliance and a score is given based on the pre-determined set of weighted criteria

Prices are then evaluated using a specific formula

Technical and Financial scores are combined, and the proposal having received the highest overall score is usually awarded

**EVALUATION BASED ON THE LOWEST
PRICED COMPLIANT ACCEPTABLE OFFER
AND
LOW VALUE PROCUREMENT**

EVALUATION FOR SIMPLE PURCHASES OR LOWEST PRICED COMPLIANT OFFER

An evaluation team is not required and can be conducted by procurement personnel internal to the User Department

Internal consultations may be held with the user(s) of the items to help form the decision

Bids are reviewed to ensure compliance with the following criteria (other criteria may be applied)

✓ Items	✓ Payment terms
✓ Quantities	✓ Warranty period
✓ Delivery period	✓ Other criteria (where applicable)

Once bids are compliant in all areas, the award is made to the lowest priced compliant acceptable offer

If bids are not compliant, the evaluator will need to assess bids accordingly and award based on the bid that meets the most requirements at the lowest price.

The decision for the award must be justified in all instances

FINANCIAL EVALUATION FOR SIMPLE PURCHASES LOWEST PRICED COMPLIANT/ACCEPTABLE OFFER

Simple example of a lowest responsive/compliant acceptable offer

List of Goods/Services/Works	Quantity	UOM	Unit Cost	Supplier 1	Unit Cost	Supplier 2	Unit Cost	Supplier 3
Copy Paper 8 / x 11	50	reams	\$20.00	\$1,000.00	\$25.00	\$1,250.00	\$15.00	\$750.00
Copy Paper 8 / x 14	50	reams	\$50.00	\$2,500.00	\$55.00	\$2,750.00	\$35.00	\$1,750.00
Pencils	100	boxes	\$10.00	\$1,000.00	\$12.00	\$1,200.00	\$25.00	\$2,500.00
Sub Total				\$4,500.00		\$5,200.00		\$5,000.00
VAT 12.5%				\$562.50		\$650.00		\$625.00
Total				\$5,062.50		\$5,850.00		\$5,625.00

EVALUATING SIMPLE PURCHASES OR LOWEST PRICED COMPLIANT OFFER

Select supplier/contractor

- After evaluating quotations received, a selection is made

Seek Approval

- Seek approval from Dean, Head of Department or approved designate for recommendation

Purchase order (PO)

- Prepare PO on Banner and submit for necessary approvals

Expedite order

- Submit PO to selected supplier/contractor for delivery of goods/works/service

Receipt of delivery

- Ensure supplier/contractor invoice is received upon receipt of goods/works/service

Payment to supplier

- Ensure payment is processed in a timely manner

EVALUATING SIMPLE PURCHASES OR LOWEST PRICED COMPLIANT OFFER

Criteria	Overall Score	Supplier 1	Supplier 2	Supplier 3	Supplier 4
		Score	Score	Score	Score
Supplier Experience	30	25	21	15	17
Quality	20	15	17	10	15
Resources	20	15	12	13	11
Equipment	10	7	9	6	8
Delivery	20	19	15	11	20
Total	100	81	74	55	71
Minimum Acceptance Score	70				

Weighted Criteria with a Minimum Acceptance Score

EVALUATING SIMPLE PURCHASES OR LOWEST PRICED COMPLIANT OFFER

Supplier	Score	Price
Supplier 1	81	\$150,000
Supplier 2	74	\$125,000
Supplier 3	71	\$100,000

Supplier 3 is awarded having met the minimum acceptance of 70 points and providing the lowest price.

EVALUATION FOR COMPLEXED PROCUREMENT OR WEIGHTED SCORING METHOD

INDIVIDUAL SCORING

HOW IT WORKS

- Evaluators should read and evaluate each submission on their own, in accordance with the method and criteria stated in the RFQ/RFP/ITT.
- Evaluators should not discuss the evaluation of submissions during their individual assessments, in order to avoid unduly influencing each other.

INDIVIDUAL SCORING

HOW IT WORKS

- Evaluators can liaise with the Evaluation Committee Chairman if further understanding is needed to evaluate a particular area.
- The evaluators should evaluate all submissions completely, even if they feel that the Minimum Acceptance Score (MAS), if any apply, will not be met or that the bid could not possibly be successful.

ENHANCED CONSENSUS SCORING

Consensus scoring can be used when the evaluators may not have a complete understanding of all the technical areas of the RFQ/RFP/ITT.

ENHANCED CONSENSUS SCORING

HOW IT WORKS

- Evaluators should read and evaluate each submission on their own, in accordance with the method and criteria stated in the RFQ/RFP/ITT.
- Evaluators should not discuss the bid information during their individual assessments, in order to avoid unduly influencing each other.

Source: <https://procurementoffice.com/implementing-enhanced-consensus-scoring/>

ENHANCED CONSENSUS SCORING

HOW IT WORKS

- Scores will be sent directly to the Chairman of the Committee then evaluators will meet together to discuss their scores.
- Only scores that fall outside the pre-set variation tolerance are addressed during the consensus scoring sessions.

Source: <https://procurementoffice.com/implementing-enhanced-consensus-scoring/>

ENHANCED CONSENSUS SCORING

HOW IT WORKS

- Each evaluator starting with the lowest score, will speak individually on why that initial score was given.
- After each evaluator gives their explanation without interruption, the Chairman closes the discussion.
- Each evaluator is then given an opportunity to revisit their individual scores and make adjustments based on the group discussion.

<https://procurementoffice.com/implementing-enhanced-consensus-scoring/>

ENHANCED CONSENSUS SCORING

HOW IT WORKS

- Evaluators should be instructed to record the reasons for any changes to their initial scores.
- Once completed, the final individual scores will be averaged to arrive at the final overall scores.
- Both the original scores and amended scores will be retained.

<https://procurementoffice.com/implementing-enhanced-consensus-scoring/>

MIXED EVALUATION SCORING

What is it?

A Blended Scoring Approach is a bid evaluation methodology which combines individual scoring for some criteria and consensus scoring for other criteria in one evaluation process.

MIXED EVALUATION SCORING

How it works:

1. The **consensus approach** for some criteria is sometimes used where only subject matter experts in the Evaluation Committee score on specific criteria, after which the scores for those specific criteria will be adopted and utilized by the rest of the members of the Evaluation Committee.

MIXED EVALUATION SCORING

How it works cont'd:

2. Criteria which require a specialized or professional assessment e.g. Financial, Health and Safety, Legal, can be scored by the respective subject matter expert in the Evaluation Committee and the scores awarded for those specific criteria are accepted by all members for those criteria.

MIXED EVALUATION SCORING

How it works cont'd:

3. The subject area expert's rationale for the scores awarded to the specific criteria must be provided to the Evaluation Committee members and where necessary, a meeting can be called to ensure there is clarification and consensus.

MIXED EVALUATION SCORING

How it works cont'd:

4. In parallel, individual scoring is conducted by members of the Evaluation Committee on the remaining criteria. Evaluators should not discuss the evaluation of submissions during their individual assessments, in order to avoid unduly influencing each other.

MIXED EVALUATION SCORING

How it works cont'd:

5. However, at the commencement of the evaluation process, the members would have met and agreed what is entailed under each criteria, so that individual scores based on the application of agreed criteria for the same proposal should not differ substantially amongst members, unless individual members have misinterpreted the elements of the criteria against which the bidder is being evaluated.

MIXED EVALUATION SCORING

How it works cont'd:

6. The consensus scores and the individual scores are then combined to arrive at the final score and ranking for each bidder.

MIXED EVALUATION SCORING

Guidelines for use of the Mixed Scoring Approach:

- All members of the Evaluation Committee must agree to adoption of the blended scoring approach/methodology at its inception meeting, before the evaluation process begins.
- The Evaluation Report should detail the rationale for adopting a blended approach to scoring and use of the particular subject area expert.

**REFERENCE CHECKS MAY
ALSO BE PART OF THE
EVALUATION AND IS CRITICAL
IN THE WAY IT IS CONDUCTED**

CONDUCTING REFERENCE CALLS

Why are reference calls done?

To aid in the mitigation of risk specifically for high value procurement. Also, it can be done to verify the supplier/contractor's credibility and help to confirm information such as:

- Performance
- Knowledge and expertise
- Contract status/execution
- Capacity and resources

CONDUCTING REFERENCE CALLS

Who conducts reference calls?


Two or more evaluators should be present during reference calls.

The information received should be recorded and signed off by the evaluation committee members present during the call.

Where a client reference questionnaire is being used, the document can be submitted and returned via email.

CONDUCTING REFERENCE CALLS

Example: Client Reference Questionnaire


THE UNIVERSITY OF THE WEST INDIES
ST. AUGUSTINE, TRINIDAD AND TOBAGO, WEST INDIES
Faculty: ~~Department~~ Unit
St. Augustine Campus
Telephone: (868) 682-2002 ~~Ext. XXXX~~ Email: department@sta.uwi.edu

RFC/Dept/001/20
Supply and Delivery of Computers and Laptops to
The University of the West Indies, St. Augustine Campus

CLIENT REFERENCE QUESTIONNAIRE

SUPPLIER NAME	
CLIENT REFERENCE NAME	
CLIENT REFERENCE NUMBER	

Please tick (✓) the appropriate rating based on response given.

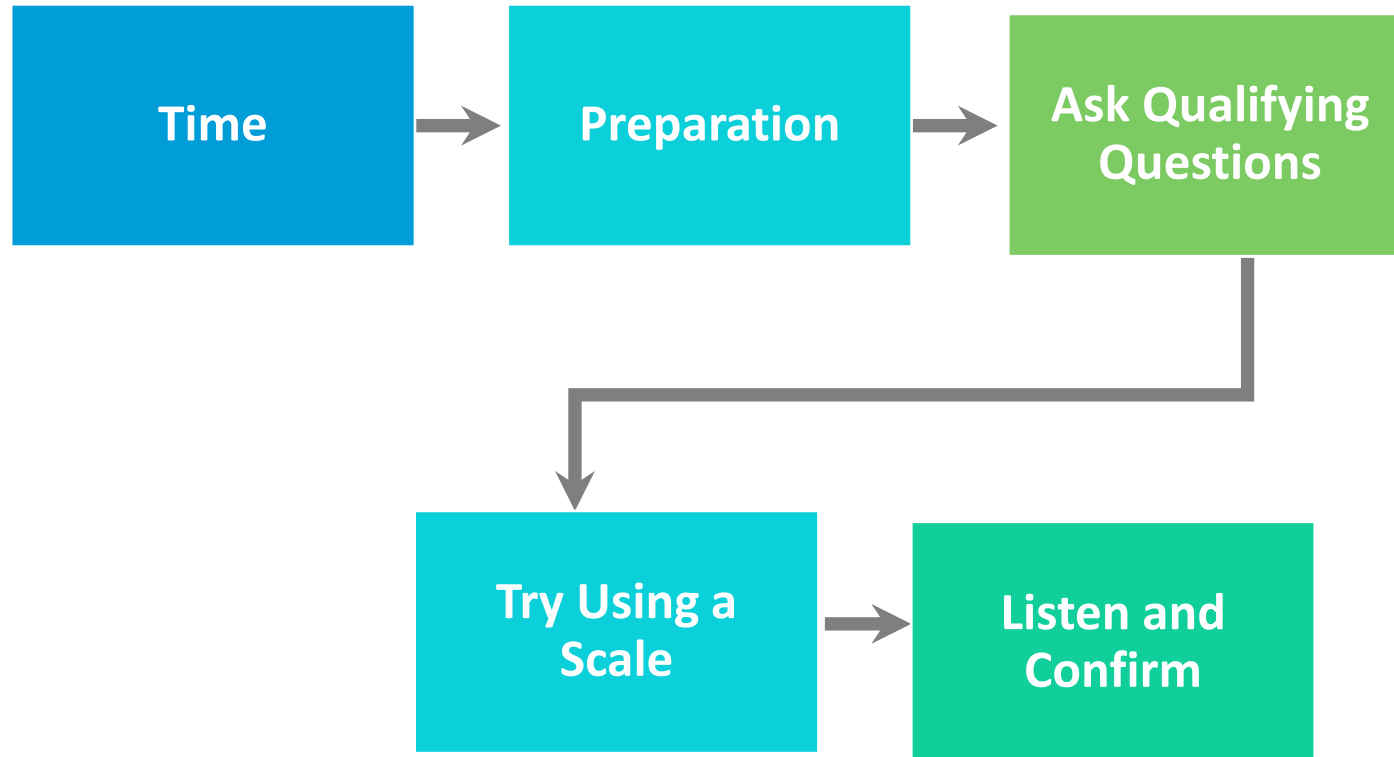
No.	Question	Excellent 5 pts	Good 4 pts	Fair 3 pts	Poor 1 pts
1	Did the computers conform to specifications and requirements?				
2	Did the supplier consistently meet the service level requirements throughout the term of the contract?				
3	Did the supplier complete the delivery of equipment on time as per your contract requirements?				
4	Were you satisfied with the service and communication provided by the supplier throughout the duration of the contract?				
5	How satisfied were you with the supplier's overall performance of the contract?				

Evaluation Committee Member: _____
PRINT NAME SIGNATURE DATE

Evaluation Committee Member: _____
PRINT NAME SIGNATURE DATE

1 | Page

WHAT SHOULD BE CONSIDERED WHEN CONDUCTING REFERENCE CALLS?



JUST TO RECAP

- Evaluate proposals in accordance with:
 - Criteria set out in the RFQ/RFP/ITT
 - Lowest priced, responsive/compliant/acceptable method
or
 - Weighted Criteria Method
- Technical proposals that fail to meet the relevant Minimum Acceptance Score (MAS) shall not be considered for the financial evaluation
- If bid information is not clear, clarification can be sought in writing.

Note: For qualitative criteria ensure to justify scoring and explain the variations in scores.

**NOW IT'S TIME
TO TABULATE THE
TECHNICAL SCORES**

EXAMPLE: WEIGHTED TECHNICAL EVALUATION

Criteria	Weighting	Supplier 1	Supplier 2	Supplier 3
		Score	Score	Score
Supplier Experience	35	25	21	25
Quality	15	7	9	5
Resources	20	9	12	13
Equipment	25	15	17	10
Delivery	20	19	14	11
Total	115	75	73	64
Weighted Average		65	64	56

Example 1 (where max score exceeds 100)

(Total Score Obtained by the Offer /
Maximum Points to be obtained) x 100

Supplier 1 - $75 / 115 \times 100 = 65 \times 0.7 = 46$

Supplier 2 - $73 / 115 \times 100 = 63 \times 0.7 = 44$

Supplier 3 - $64 / 115 \times 100 = 56 \times 0.7 = 39$

Example 2 (where max score is out of 100)

Total Score Obtained by the Offer /
Maximum Points to be obtained

Supplier 1 - $75 \times 70\% = 52$

Supplier 2 - $73 \times 70\% = 51$

Supplier 3 - $64 \times 70\% = 45$

**NOW IT'S TIME
TO CONDUCT THE
FINANCIAL EVALUATION**

CURRENCY CONVERSION

Where bids are priced in more than one currency, all currencies are converted to a single currency for evaluation based on exchange rates from a specified source, as stated in the bidding documents

EXAMPLE: WEIGHTED FINANCIAL EVALUATION

Supplier	Price	Financial Score	Financial Score (after applying the weighted average)
Supplier 1	\$100,000	100	30
Supplier 2	\$125,000	80	24
Supplier 3	\$115,000	86	26

(Lowest Priced or Cost Offer / Price or Cost of the Offer Being Evaluated) x 100

Supplier 1 - $100000/100000 \times 100 = 100$

Supplier 2 - $100000/125000 \times 100 = 80$

Supplier 3 - $100000/115000 \times 100 = 86$

next step



Financial Score x weighted average (30%)

Supplier 1 - $100 \times 30\% = 30$

Supplier 2 - $80 \times 30\% = 24$

Supplier 3 - $86 \times 30\% = 26$

FINANCIAL EVALUATION FOR WEIGHTED SCORING METHOD

1. Prices are then evaluated using a specific formula
2. Technical and Financial scores are combined and the bid having received the highest overall score is usually awarded

EXAMPLE: FINANCIAL EVALUATION

Supplier	Price	Score	Weighted Average (30%)
Supplier 1	\$100,000	100	30%
Supplier 2	\$125,000	80	24%
Supplier 3	\$115,000	86	26%

(Lowest Priced or Cost Offer / Price or Cost of the Offer Being Evaluated) x 100

Supplier 1 - $100000/100000 \times 100 = 100 \times 30\%/100 = 30$

Supplier 2 - $100000/125000 \times 100 = 80 \times 30\%/100 = 24$

Supplier 3 - $100000/115000 \times 100 = 86 \times 30\%/100 = 26$

EXAMPLE: RESULTS OF A COMBINED WEIGHTED TECHNICAL & FINANCIAL EVALUATION

Example 1 (where max score exceeds 100)

Supplier	Technical Score	Financial Score	Combined Score
Supplier 1	46	30	76
Supplier 2	44	24	68
Supplier 3	39	26	65

Example 2 (where max score is 100)

Supplier	Technical Score	Financial Score	Combined Score
Supplier 1	52	30	82
Supplier 2	51	24	75
Supplier 3	45	26	71

POST-BID CLARIFICATION OF RESPONSES

Take great care when seeking clarification. There is often a very fine line between gaining clarification of existing information and allowing a bidder to modify or add to the existing bid submission. If new information is accepted, even inadvertently, there is a good chance that the evaluation process may be invalid.



All communication with suppliers/contractors should be in writing. If verbal communication is required, it should be properly documented.

Further information on Post Bid Clarification can be found in the extended version of this presentation on the Procurement Unit's website.

POST BID CLARIFICATION

This is where the supplier/contractor is contacted for the purpose of clarifying areas of their proposals that are unclear, inconsistent, creates uncertainty or contains minor errors.

The designated PEA is responsible for communicating with suppliers/contractors on all clarifications where necessary.

POST BID CLARIFICATION

Points to note:

- Neither the substance of the submission nor the price of the offers should be allowed to be changed
- Post bid clarifications is not an opportunity for the bidder to correct any errors or revise a bid (except in the case of arithmetical error)

POST BID CLARIFICATION

Points to note:

- Focus on the issues that have been identified during the preliminary evaluation
- Keep in mind that any modification to existing submissions can void the evaluation process
- For abnormally low bids clearly state what determined that the bidder's price may be abnormally low

POST BID CLARIFICATION

Points to note:

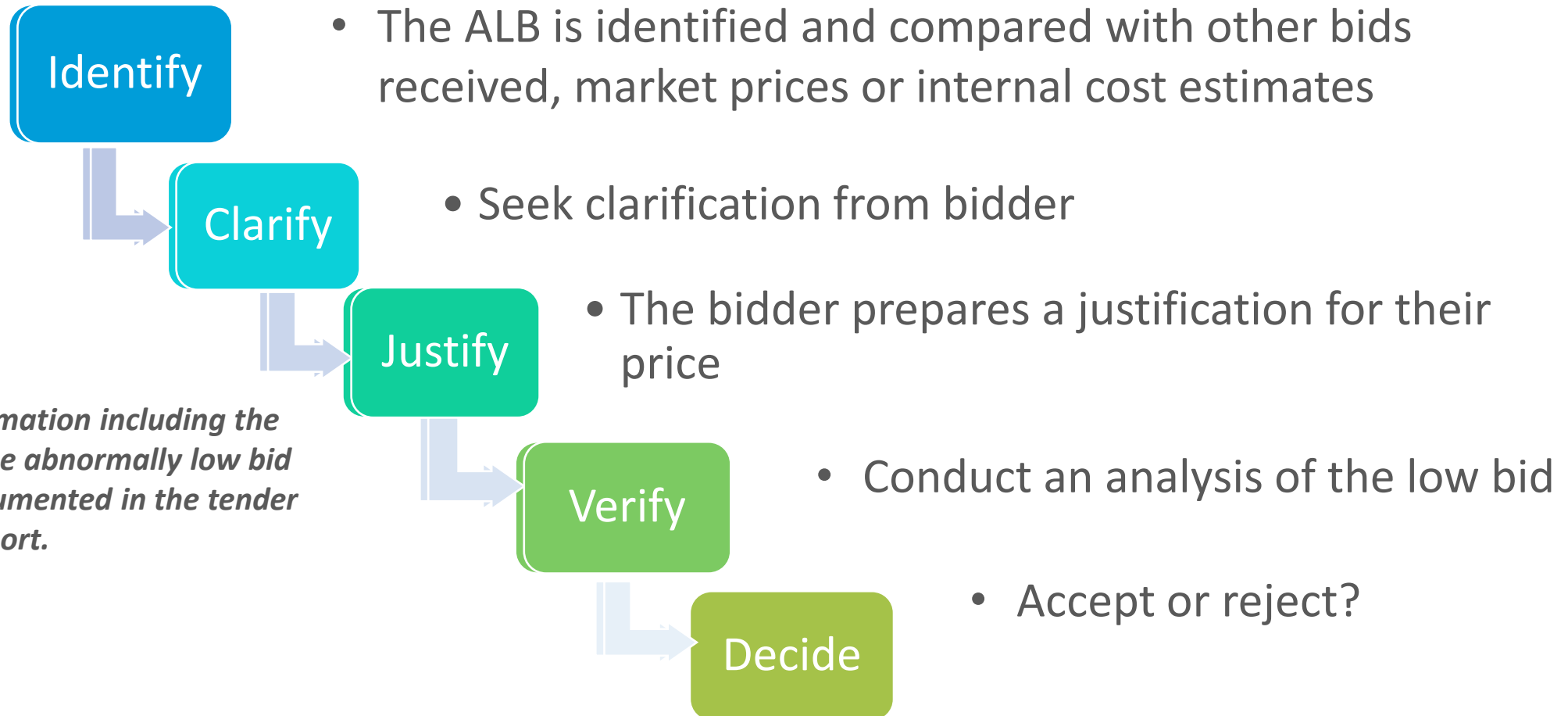
- Stipulate how the information is to be provided by the bidder (include forms and templates)
- Allow sufficient time for responses for example 3 - 5 business days.
- Seek clarification in writing and include deadline date and time by which the supplier/contractor needs to respond

WHAT IS AN ABNORMALLY LOW BID

An Abnormally Low Bid (ALB) is a submission in which price, in combination with other elements of the submission, is so abnormally low in relation to the subject matter of the public procurement that it raises concerns with the procuring entity as to the ability of the supplier or contractor that presented it to perform the procurement contract.

Source: OPR Guideline - Evaluation of Bids and Award of Contracts

EVALUATING AN ABNORMALLY LOW BID



Note: All information including the outcome on the abnormally low bid should be documented in the tender evaluation report.

CORRECTING OF ARITHMETICAL ERRORS

- Where there is a discrepancy between words and figures, words shall prevail
- Correct unit price where there is a discrepancy between the unit price and the total price
- Where there is a discrepancy between words and figures, words shall prevail unless there is a gross misplacement of the decimal point in the unit rate. The line item total as quoted will govern and the unit rate will be corrected
- Bidders shall be notified in writing of any corrections and requested to agree to the correction
- A bidder that does not accept the correction of an arithmetical error shall be rejected and its bid security, if any, may be forfeited.

ACHIEVING VALUE FOR MONEY

Is the lowest price the best price?

- The Evaluation Committee is not obligated to select the overall lowest priced tender
- Value for money should be obtained

What is Value for Money?

Value for money (VFM) is not about achieving the lowest price. It is about achieving the optimum combination of whole life costs and quality.

ACHIEVING VALUE FOR MONEY

In seeking Value for Money the following is considered:

- Other critical non-price factors which were previously defined
- Economy – minimising the cost of resources for an activity ('doing things at a low price')
- Efficiency – performing tasks with reasonable effort ('doing things the right way')
- Effectiveness – the extent to which objectives are met ('doing the right things')

NON-SUBMISSION ENQUIRIES

- At the end of the evaluation, the committee should contact each supplier/contractor individually in writing (email) to enquire why they did not submit a proposal.
- A list of all suppliers/contractors and their reasons for non-submission should be documented in the evaluation report.
- The emails with their responses should be attached to the evaluation report as proof of their response.

EXTENSION OF BID VALIDITY PERIOD

- The evaluation committee shall make every effort to complete the evaluation before the expiration of bid validity.
- If an extension of bid validity is considered necessary, all those who submitted bids shall be asked to extend the validity of their bids.
- Bids should only be extended to allow for the award process to be completed and no longer.
- The Bid Validity Extension Letter shall be prepared and issued by the Head of Department.

EXTENSION OF BID VALIDITY PERIOD

- Bidders who are willing to extend the validity of their bids shall not be permitted to modify the substance or price of their bids and tender securities, where applicable.
- Any bid securities of bidders who do not extend the validity of their bids must be returned to them promptly.

**NOW YOU CAN
PREPARE THE
EVALUATION REPORT**

EVALUATION REPORTING REQUIREMENTS

Guidelines for report preparation and approval:

- Use the **Price Only Evaluation Report Template** for values up to **TT\$10,000** (if applicable)
- Use the **Evaluation Report template designed as a mix of check boxes & fill-in-the-blank type responses**, for values above **TT\$10,000** up to **TT\$100, 000**
- **For values above TT\$100k** – Use the evaluation report that requires full written details

Completed Evaluation Report Template and supporting documents attached such as PR, RFQ ,Quotes, correspondences etc. to be signed and submitted to the HOD for approval.

Refer to extended presentations on website for list of documents that would accompany the evaluation report

EVALUATION REPORT above TT\$100,000

Composition of the Evaluation Report above \$100,000

- Introduction and Background
- Procurement Process
- Evaluation Committee & Roles
- Evaluation Method and Criteria
- Analysis of Proposals
- Determination of Scores
- Negotiation Details (if applicable)
- Recommendation for Award

EVALUATION REPORT

When writing the Evaluation Report, assume that each person reading the report has no prior knowledge about the project or procurement undertaken.

All Evaluation Reports must be able to withstand scrutiny of the approving authorities, auditors and other stakeholders.

EVALUATION REPORT

Who will have an interest in the Report?

Internal: HOD, Procurement Manager/Unit, Campus Bursar, Campus Principal, Campus Procurement Committee, CF&GPC and Internal Auditors.

External: Donors, Sponsors, Funders, Auditors, Office of Procurement Regulation, Ministry of Education, Suppliers/Contractors seeking to challenge a decision made, as per Procurement Act.

EVALUATION REPORT above TT\$100,000

Introduction

- A brief explanation of the reason for the procurement.
- A brief description of the project
- Budget/funding

**EVALUATION
REPORT
above
TT\$100,000**

Background

- An explanation on how the project was initiated
- Any prior approval granted

**EVALUATION
REPORT
above
TT\$100,000**

Procurement Process

- Procurement method used to invite bidders
- A listing of firms that submitted bids
- Reasons for disqualification of bids
- How was suppliers/contractors shortlist derived?
- The bid opening procedure
- Reasons for non-submission from suppliers/contractors

**EVALUATION
REPORT
above
TT\$100,000**

Evaluation Process

- Names and positions of Evaluation Committee
- The evaluation method, criteria and scoring
- How was the evaluation conducted?

**EVALUATION
REPORT
above
TT\$100,000**

Analysis of Proposals and Scoring

- Describe in detail the evaluation process and the evaluation method applied.
- Copies of the request documentation, any amendments or clarifications issued.
- A detailed evaluation of each bid against the evaluation criteria.
- Advice provided by the Procurement Unit and Campus Legal Office, the nature of any advice received and whether that advice was accepted or not.

**EVALUATION
REPORT
above
TT\$100,000**

Analysis of Proposals and Scoring

- The results of the comparative assessment of the bids.
- An overview of the completed evaluation, with a justified ranking of bids received, and a recommendation as to the selection of a supplier/contractor.
- A summary of any critical issues relating to the evaluation and the evaluation criteria used to select the preferred supplier/contractor.

EVALUATION REPORT above TT\$100,000

Recommendation for Award

1. Be clear of the recommendation for award statement:
 - ensure the preferred bidder's name and the goods/services/works to be provided are clearly stated
 - Ensure the price stated is VAT exclusive and is accurate in words and numbers.
2. Provide an outline of the way forward if it is not possible to recommend a preferred supplier/contractor.
 - Request to negotiate with the preferred supplier/contractor cancelling and re-issuing of bid documentation
 - A decision not to proceed with an award and close the process

**EVALUATION
REPORT
above
TT\$100,000**

Once the Evaluation Report is completed, submit to the respective PEA for review and onward submission to the HOD, Campus Bursar, Campus Principal and CF&GPC for endorsement or approval

PREPARATION OF THE **EVALUATION REPORT** FOR APPROVAL

Documents to be submitted with the evaluation report for expenditure above \$100K:

- Approved Procurement Requisition
- Advertisements, Invitation Letters (where necessary)
- Request for Quotation/Request for Proposal/Invitation to Tender
- Addenda (clarification questions and responses)
- Pre-bid meeting attendance registers and notes
- Bid Package Opening Registers and notes
- Clarification of received proposals and responses, where applicable
- Summary score sheets (signed by all evaluation committee members)

All Evaluation Committee members must sign the Evaluation Report

Scan all documents as one PDF document

DELEGATION OF AUTHORITY FOR AWARD OF PROCUREMENT CONTRACTS

The approving authority per contract value:

- Up to TT\$100k – Deans/Head of Department (HOD)/Accountants (Financial Managers)
- Above TT\$100k to TT\$400k - Campus Bursar
- Above TT\$400 to TT\$750k - Campus Principal
- Over TT\$750k - Campus Finance & General Purpose Committee (CF&GPC)

Based on
recommendation of
CPC

The Dean/HOD is required to endorse all contracts above \$100k

SUBMISSION OF EVALUATION REPORT FOR APPROVAL

Report should be submitted as follows:

- To Procurement Unit (CPC Secretariat) at least one week before CPC Meeting. Actual dates will be provided accordingly.
- Electronic copy to be sent via email with physical submission of original to be sent closely after. Both must be submitted prior to CPC meeting.
- Containing very little to no errors, clear language and no slang.

SUBMISSION OF EVALUATION REPORT FOR APPROVAL

Report should be submitted as follows:

- Containing only factual information and no personal opinions.
- In proper format, pages numbered and sections clearly identifiable. Appendices should also be numbered and headed accordingly.
- Secured or fastened neatly and in order of table of contents.

SUBMISSION OF EVALUATION REPORT FOR APPROVAL

Approval of Evaluation Report for expenditure above \$400K:

- CPC Secretariat receives CPC's recommendation for approval of the report in writing
- CPC Secretariat submits recommendation for approval to the PEA
- PEA prepares "Award of Contract" paper for approval by either Campus Principal or CF&GPC
- Campus Principal or CF&GPC approves
- PEA receives confirmation of approval (award or negotiate) in writing

NEGOTIATIONS IN THE PROCUREMENT PROCESS

Negotiations during a procurement process are in principle allowed, if provided for in The UWI's Procurement/Tender Procedures and solicitation document and after the selection of the preferred supplier has been completed.

NEGOTIATIONS IN THE PROCUREMENT PROCESS

When to negotiate:

- When there is a high probability of an improved outcome
- When the price/s offered are not considered to be fair and reasonable in “direct contracting” situations
- When there are substantial risks for either party which warrant clarification
- When it is cost effective for you to do so

(Source: OPR General Guidelines: Negotiations 2019 Page 8)

NEGOTIATIONS IN THE PROCUREMENT PROCESS

What to Negotiate?

- **Technical** (Warranties, After Sale Service, Life-cycle support, Key Personnel, Subcontracting arrangements)
- **Programme** (Key Milestones, Reports)
- **Timeframes** (Delivery Dates, Completion Dates, Response Times)
- **Quality** (Minor quality issues)
- **Commercial** (Payment Schedule/Terms)
- **Contractual** (Duration of Contract, Types of bonds, guarantees, insurances)
- **Price** (Based on Value Engineering)

NEGOTIATIONS IN THE PROCUREMENT PROCESS

NOTE:

“In a competitive tendering environment, negotiation with providers should not take place before tenders have been fully evaluated and, as a result of this evaluation, a preferred tenderer (or a short-list of tenderers) has been identified”

(Source: Chartered Institute of Purchasing & Supply , 2018. Adapted from UNDP/CIPS Advanced Certificate in Public Procurement, Level 3)

NEGOTIATIONS IN THE PROCUREMENT PROCESS

NOTE:

“Sometimes it is necessary to seek clarification of offers before the final selection of the preferred supplier is made. This may be essential to allow you to reach an informed decision on who has provided the best offer and seeking such clarification is perfectly acceptable.

However, you must be extremely careful that clarification does not become negotiation (for example, asking the supplier leading questions)”

(Source: Chartered Institute of Purchasing & Supply , 2018. Extracted from UNDP/CIPS Advanced Certificate in Public Procurement, Level 3)

NEGOTIATIONS IN THE PROCUREMENT PROCESS

Approval to Negotiate...Who approves negotiation at UWISTA ?

- Campus Finance and General Purpose Committee (CF&GPC), on the recommendation of the CPC, grants approval to proceed with negotiations with a preferred bidder (whether “direct” or shortlisted) in procurement within the CF&GPC’s approval authority (that is, \geq \$750,000.00) V.E.
- Campus Procurement Committee (CPC) grants approval to proceed with negotiations with a preferred bidder (whether “direct” or shortlisted) in procurement up to \$750,000.00 V.E.

NEGOTIATION PLAN AND STRATEGY

1. Agree Negotiation Team
2. Agree the objectives and desired outcomes
3. Best and Worst Case – Minimum Position
4. Develop Negotiation Strategy
 - a. Best order to discuss issues
 - b. Who speaks on what issues
 - c. Areas likely to be problematic (sticking points)
 - d. Concessions

RECORD OF NEGOTIATION

- Take detailed minutes/notes of the meeting
- At the end of the meeting, clarify agreed items and deadlines
- Circulate minutes/notes to all parties to confirm
- Issue final minutes/notes to all parties involved
- Minutes/notes of the negotiations, written correspondence and final agreements to be incorporated into the contract

NEGOTIATION REPORT

- Final agreement between the parties
- Actionable items and date for execution
- Closing and Recommendations
- Signatures

Submit Report using **Post Negotiation Report Template**

OUTCOME OF THE NEGOTIATIONS

- The outcome of the negotiations may or may not lead to a recommendation to award a contract.
- If negotiations fail, the CPC/CF&GPC will advise whether the next best bidder should be considered for award.

**Negotiations are
complete and now
it's time to award**

STANDSTILL PERIOD.....YES OR NO?

In most cases the contract is immediately awarded after the approval to award is given. However, there may be instances where a Standstill Period is given and enforced before the contract is finally awarded.

- If No Standstill Period, go straight to award
- If a Standstill Period is given, notice must be given accordingly

AWARD OF CONTRACT

Prepare Notice of Award/Acceptance

- The **Letter of Award/Acceptance** is prepared, signed and issued by the PEA that executed the tender process
- Notice of Award/Acceptance is issued in triplicate
- Supplier signs, stamps and returns two (2) copies to UWI
- One copy goes to the Bursary as part of the payment package and the other remains with the Department for filing

CONTENTS OF THE NOTICE OF AWARD WITH STANDSTILL PERIOD

- The name and address of the supplier/contractor to which the contract will be awarded;
- The contract price;
- The duration of the standstill period (where applicable);
- The expiry date of the standstill period (where applicable);
- The evaluation criteria and scoring system published in the solicitation document;
- The score achieved for each criterion and the total score achieved by the successful supplier;
- The score achieved for each criterion, and the total score, achieved by the specific bidder to whom the notice of decision of award is being issued.

The Procurement Unit will be responsible for issuing the “Notice” and managing the Standstill process

Source: OPR Guideline – The Standstill Period

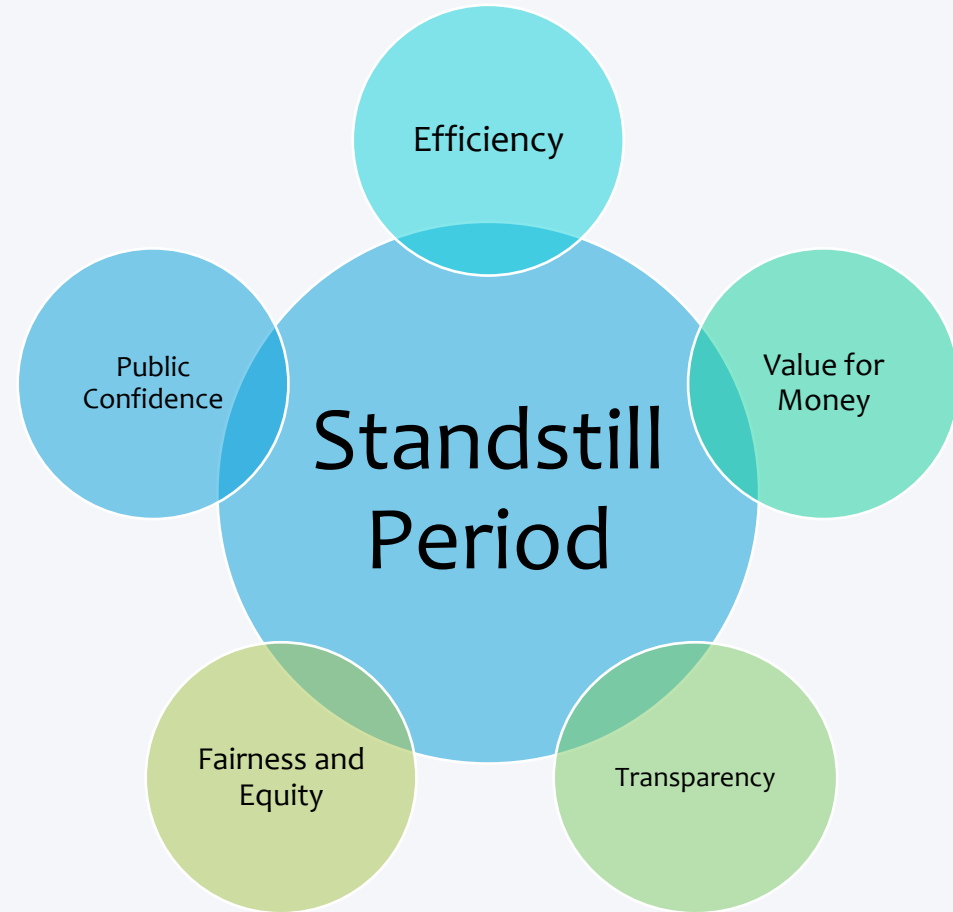
THE **STANDSTILL** PERIOD

- The Standstill Period is enforced in high value, high risk contracts
- Notice is given to both the successful and unsuccessful suppliers/contractors.
- The Standstill Period shall be no less than ten (10) working days
- The award cannot be made unless the Standstill Period has ended, or the contract award will be void or illegal.
- The standstill period is fixed, and you will have no duty to respond to queries received after the end of the period.

WHY IS THE STANDSTILL PERIOD USED?

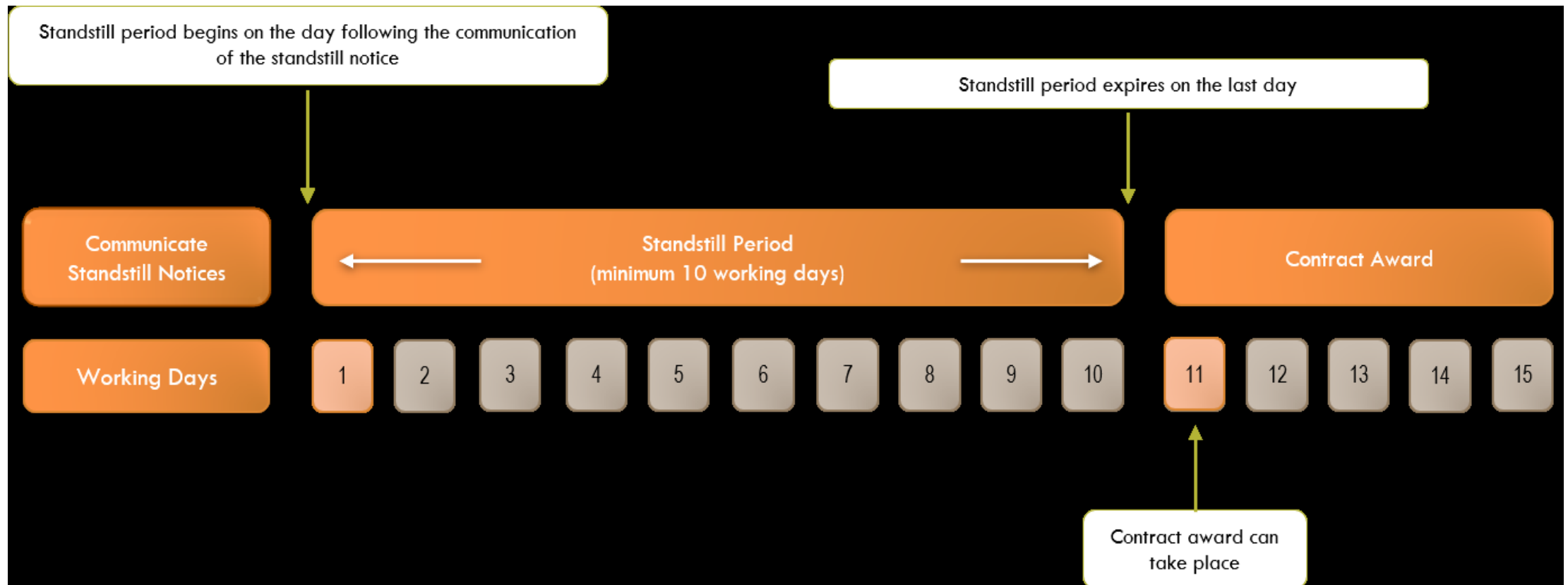
‘The standstill period provides the unsuccessful supplier/contractor with the opportunity to gather relevant information from the procuring entity on the decision to award a contract.’
OPR General Guidelines – The Standstill Period

According to Section 49 of ‘The Act’, appropriate action can be taken to challenge the decision of the procuring entity.



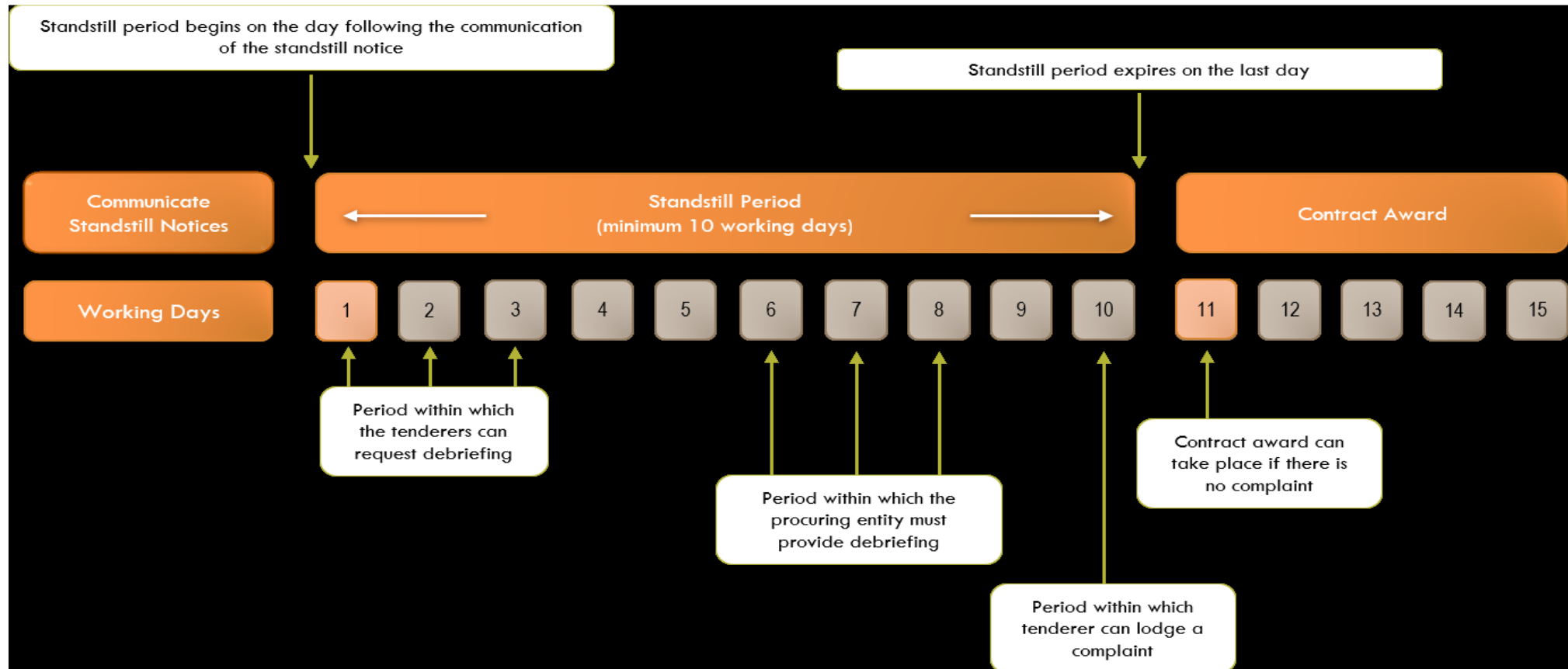
HOW DOES THE STANDSTILL PERIOD WORK?

Without Debriefings



HOW DOES THE STANDSTILL PERIOD WORK?

With Debriefings



WHAT HAPPENS IF AN AWARD IS CHALLENGED?



DO NOT AWARD



Forward query to The Office of Procurement Regulation and await their decision

Consult The Procurement Unit before giving notice of the Standstill Period.

CONTRACT EXECUTION

What is a Procurement Contract?

A procurement contract is a legally binding agreement concluded between a procuring entity and an approved supplier/contractor, which establishes the terms and conditions for the procurement of goods, works or services, including the rights and obligations of the parties thereto

PREPARATION OF CONTRACT

Note:

- Waiting until the contract award phase to decide on the most appropriate form of contract, is a sign that steps have been missed at the planning stage.
- Finalisation and consensus of terms and conditions likely to be prolonged if this is the first time the awardee is viewing the contract.

FORMS OF CONTRACTING

Letter of Award/Acceptance (with Terms and Conditions)

- To be used for purchases up to TT\$100K
- To be signed by the PEA that executed the procurement process
- If to be used for purchases above TT\$100K, this must be approved by the Campus Legal Office
- If a formal contract is also to be used for a purchase up to TT\$100K, please consult the Legal Office (or Procurement Unit)

FORMAL CONTRACT

- Standard Form Contracts for Goods/Works/Services to be used for purchases up to TT\$400K
- To be endorsed by Deans, Directors or HODs
- To be signed by Campus Bursar/Deputy Bursar
- CPO Forms of Contracts, FIDIC Forms of Contracts and any other Contract Form approved by the Campus Legal Office to be used for purchases >TT\$400k. To be signed by an authorized Contract Signatory

Please seek Legal Office's or Procurement Unit's advice during the Contract preparation stage

PREPARATION OF PURCHASE ORDER

For goods/works/services up to TT\$100,000.00 (V.E.)

- Complete Purchase Order (PO) in Banner. Details on Purchase Order should include:
 - Full description of goods/services/works
 - Quantities
 - Delivery date/s
 - Reference to quote number/s
 - Source of funds account
 - Correct unit prices
 - Contact person
- Submit to Head of Department for approval
- Submit supporting documents to Bursary (Budgets) for review and printing, where necessary

PREPARATION OF PURCHASE ORDER

For goods/works/services up to TT\$100,000.00 (Vat Excl.)

- Documents required for Bursary (Budgets)
 - Approved Procurement Requisition (PR)
 - Quotations from all suppliers/contractors
 - Approved bid evaluation report
 - Any other information where necessary
- Once the PO is printed **ONLY** the Head of Department or Approved Designate signs on behalf of UWISTA
- Submit signed PO to supplier/contractor for signature
- Supplier/contractor returns a signed copy of PO
- Retain signed PO and all other supporting documents for filing

CONTRACT PREPARATION

For goods/works/services up to TT\$400,000.00 (Vat Excl.)

- Standard Forms of Contracts have been approved for use by the Campus Legal Office.
- To be used for Works/Services or Supply and/or Installation of Goods/Equipment that have undergone a procurement process
- Prepared in triplicate for endorsement by the Dean/Director/HOD and to be signed by the Campus Bursar/Deputy Bursar

CONTRACT PREPARATION

For Goods/Works/Services > TT\$400,000.00 (Vat Excl.)

- Forms of Contracts for Goods/Works/Services/Consultancies developed and used by Campus Projects Office (CPO) can be used
- FIDIC Forms of Contract can be used, where appropriate
- Any form of contract outside the approved forms of contract (PO, Works/Goods/Services Contracts, CPO Contracts, FIDIC Contracts) must be approved by the Campus Legal Office for use
- Printed in duplicate/triplicate for signature by an authorised campus signatory (Campus Principal, Campus Bursar/Deputy Bursar)

WHEN DOES CAMPUS LEGAL REVIEW

- When an approved Standard Form of Contract is not being used
- FIDIC Forms of Contract
- All Award of Contracts Approved by CF&GPC
- Any Specialised Contracts e.g. ICT contracts, Supplier contracts, etc.
- Any contract submitted by the contractor/supplier for acceptance/signature

FINALISING THE CONTRACT

Note:

- For procurement above \$400K, it is common that the form of contract to be used is decided upon at the procurement planning stage
- Entire Agreement or key terms and conditions of same should have been included in the solicitation document (ITT/RFP)
- At contract award, the Form of Contract previously stipulated in the solicitation document will be finalised with the awardee

WHO SIGNS THE PROCUREMENT CONTRACT?

PEA Dean/Head of Department – Letters of Award/Acceptance with T&C up to TT\$100k

Campus Bursar/Deputy Bursar – above TT\$100k up to TT\$400k

Campus Principal/Campus Bursar – above TT\$400k

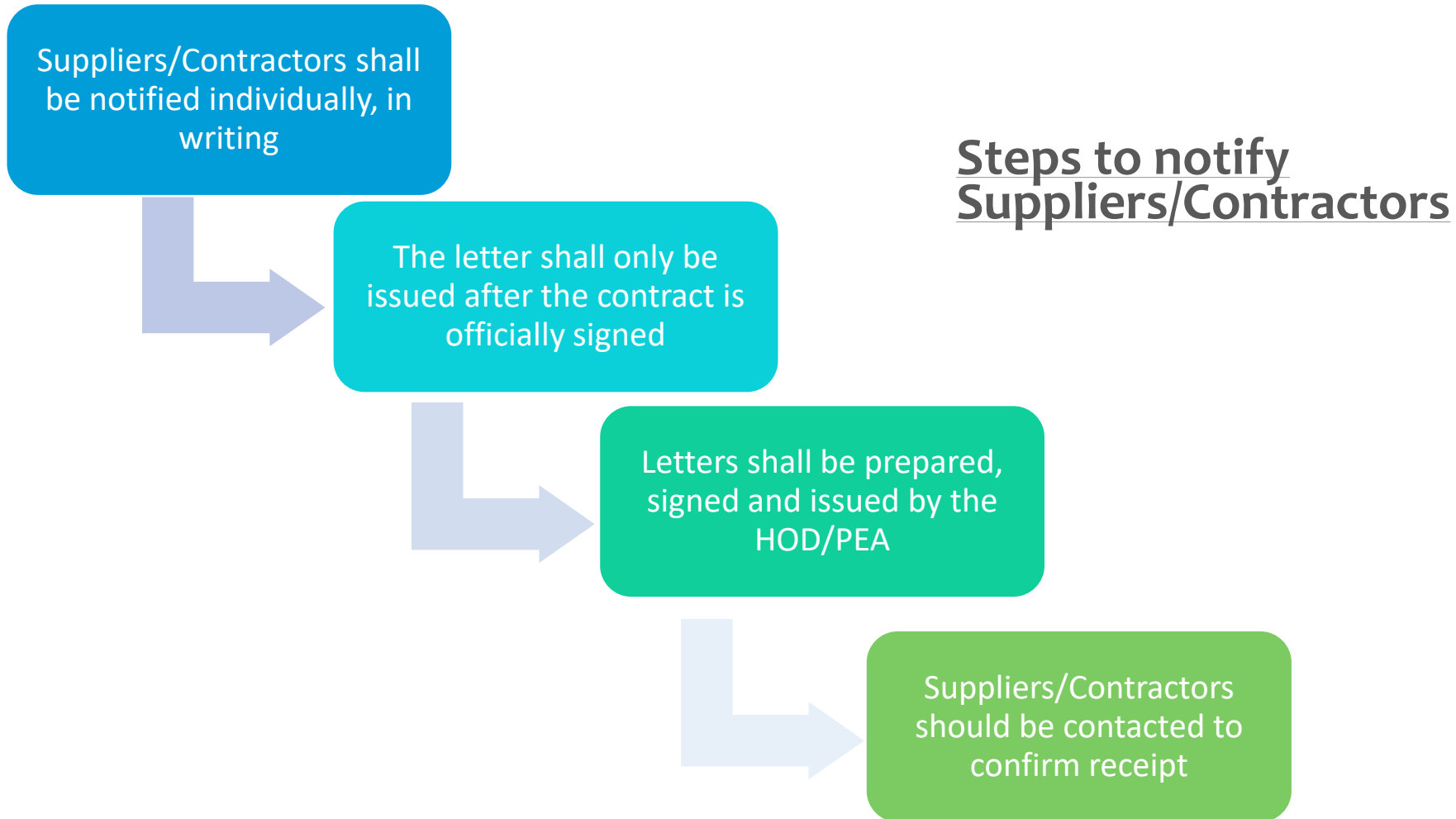
UNSUCCESSFUL SUPPLIER NOTIFICATION



Suppliers/Contractors who did not meet the qualifying standard to be successful in the tender or bid shall be notified in writing and issued a **Notice of Decision to Award** (in the case of procurement with standstill periods) **or Unsuccessful Letter** as soon as reasonably practicable possible after an award is made.

For very low value procurement activities, an email advising of such is sufficient.

NOTIFICATION TO UNSUCCESSFUL SUPPLIERS/CONTRACTORS



SUPPLIER/CONTRACTOR DEBRIEFING MEETING

- Debriefings shall be conducted by the Procurement Unit only
- Heads of Departments (HOD)/PEA should forward all requests to the Procurement Unit upon receipt
- The Chairman of the Evaluation Committee for that specific award may be required to attend the meeting
- Debriefings should only be conducted once unsuccessful suppliers/contractors are notified of the award
- Debriefings should only be conducted if requested by a supplier/contractor
- Notes of Meeting should be documented and filed accordingly

SUPPLIER DEBRIEFING MEETINGS

- Should be a “lessons learnt” experience for the unsuccessful supplier
- Enables the supplier/contractor to respond better to future solicitations.
- Debriefing should focus only on the supplier’s offer.
- Identify the unsuccessful supplier/contractor’s significant weaknesses and deficiencies, and explain the general basis of the organization’s award decision.



- **Compare the unsuccessful offer to other offers, including the successful offer.**
- **Disclose the relative merits or technical standings, proprietary data or prices of other offers.**

PUBLICATION OF AWARD

As per the legislation, the award shall be published on the UWI's website and contain the following information:

- Reference number of the solicitation
- Type of goods/works/services procured
- Name of the awarded supplier
- Total award value

TENDER CANCELLATIONS

- The solicitation document should allow provisions for cancellation
- Tender/Bid cancellations should be justified
- Participation in a procurement process is an investment on the part of supplier/contractor which costs money and time
- Unnecessary cancellations may negatively influence supplier/contractor participation in future tenders

TENDER CANCELLATIONS

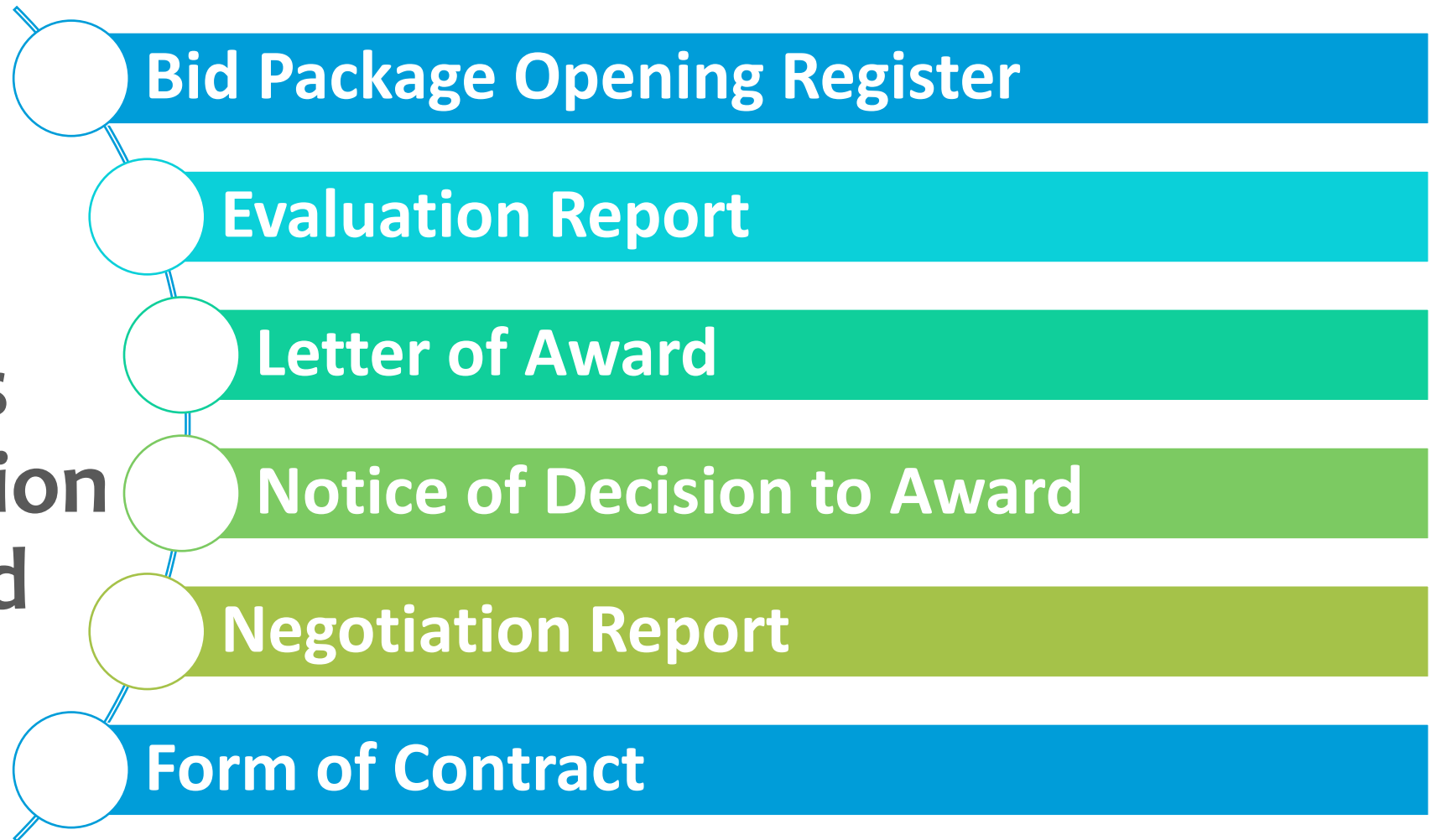
Conditions that may give rise to a cancellation are:

- Justification for the initial solicitation is no longer valid
- Requirements require material revision
- A substantial variance exists between the lowest bid and cost estimates
- In exceptional circumstances where funding is no longer available
- Where a force majeure event occurs

REFERENCES

- UN Procurement Practitioner's Handbook
- Office of Procurement Regulation Evaluation & Award Guidelines
- Office of Procurement Regulation Standstill Period Guidelines
- PPDPP Act 2015 Regulations
- <https://www.ungm.org/Areas/Public/pph/ch03s07.html>
- <https://procurementoffice.com/>

List of Templates in Evaluation and Award



NEXT ON THE TRAINING SCHEDULE

Introduction Workshop -Procurement Training



Module #2 - Procurement Planning and Solicitation



Module #3 - Evaluation and Award



Module #4 - Supplier Performance Management & Contract Management



Module # 5 - Procurement Reporting and Records Management

The word "QUESTIONS" is displayed in a large, white, 3D sans-serif font. It is centered horizontally and appears to be floating above a background of overlapping, semi-transparent squares in various shades of blue and green. The squares vary in size and are scattered across the page, creating a dynamic, abstract pattern. The overall aesthetic is clean and modern.

QUESTIONS