**Evaluation Panel Instructions**

**Template instructions**

*[These instructions should be tailored to meet the specific needs of your project. Red text should be deleted prior to publication.]*

# Before you start – some key principles about the evaluation process

## Probity

When evaluation panels are scoring submissions, Unitec must always ensure our individual and collective behaviors meet appropriate standards of probity.

Everyone involved in the evaluation must:

* Have completed/signed a Conflict of Interest & Confidentiality Agreement.
* Respect and maintain confidentiality throughout the process.
* **Not** discuss any element of the process with work colleagues or any other party.

The panel chairperson is the only person permitted to comment to outside parties (including contact with suppliers) about the evaluation process and outcome.

## Conflict of Interest / bias:

The evaluation process must be free of bias and any perception of bias. Any conflicts of interest (Actual, potential or perceived) and possible issues of bias must be disclosed and discussed with the Panel Chair before commencement of this stage.

# Initial evaluation

## The rules

There are a number of principles that should be applied when you are evaluating the supplier submissions:

Each evaluator must carry out an independent evaluation. The evaluation panel will review the individual scores and debate these. The panel, either, arrives at a consensus, or, carries out a ‘second pass’ of their evaluations, taking into account the evaluation panel discussions. [

* Tenders must be evaluated in strict accordance with the criteria enclosed/attached to these instructions.
* Only information contained in the tender submission is to be evaluated. You may also take into account information obtained from any early stage of the process. No extraneous views, supposition or assumptions should influence your evaluation.
* You must evaluate each submission on its own merit and not in comparison to another submission. While moderation will involve naturally comparing the evaluation of scores across tenders, evaluators should keep any such comparison to a minimum.
* Clear, succinct but comprehensive notes are required in support of your scores. All evaluation notes and material must be retained for audit purposes.

## Schedule

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Step | Action | Date | Time | Venue |
| 1 | Independently score each proposal using the attached tender evaluation form |  |  |  |
| 2 | Schedule evaluation panel meeting 1 |  |  |  |
| 3 | Schedule evaluation panel meeting 2 |  |  |  |
|  |  |  |  |  |

# How to score each submission

**Template instructions**

*[This next section should be updated with sufficient guidance to enable panel members to consistently score each submission.]*

The evaluation methodology permit ½ marks (e.g. 4.5, etc.).

## Rating scale

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Compliance | Definition | Deficiency | Comment | Score |
| Significantly Exceeds | Significantly exceeds the requirement in a way that provides significant 'added value' to MED. |  |  | **9-10** |
| Exceeds | Exceeds the requirement in some aspects and offers some added value to MED |  |  | **7-8** |
| Meets Requirements | Has shown an understanding of the requirement to a minimum level. |  |  | **5-6** |
| Can provide the requirement to the minimum level. |
|  |  | Minor | Marginally deficient. | **3-4** |
| Minimal cost or schedule impact to address. |
| Minor negotiation required to achieve requirement. |
| Unsatisfactory |  | Significant | Requirement only partially met. | **1-2** |
| Achievement of the requirement will impact on cost or schedule. Significant negotiation required. |
|  |  | Critical | Requirement not met to any degree by the solution offered. | **0** |
| No information provided. |

This 10-point scale can be used for evaluating most procurement. It takes a different approach to Scale B by setting ‘Meets Requirements’ at 5. It also goes down to a greater level of granularity in terms of assessing the deficiencies within submissions and the extent to which remedial action could still enable a submission to be an acceptable option.