

SAMPLE TENDER EVALUATION PLAN

Goods and Services

Standing Offer Contract

for

'X' CONSUMABLES (Insert actual product name)

RFT No. (Insert)

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1 INTRODUCTION

1.1 Objective

The objective of this Tender Evaluation Plan (TEP) is to document a fair, unbiased, rational and transparent process for the assessment of tenders for the supply and delivery of X Consumables to identify the best value for money offers. This Plan describes the processes which the Tender Evaluation Team (TET) will use to determine and recommend for approval those tenders which represent the best value for money for customers, whilst meeting objectives described in the RFT documents.

1.2 Code of Conduct for the Tendering Process

All persons involved in the tender evaluation process will be required to sign the Department's Code of Conduct for the Tendering Process or equivalent, which addresses confidentiality and the potential for conflict of interest.

1.3 Scope

This Plan identifies the:

- i) process management arrangements which will apply to the evaluation;
- ii) process to be used to evaluate tenders and to determine the recommended tenderer/s;
- iii) timing and sequence of the evaluation tasks.

1.4 Background

The State Contracts Control Board (SCCB) has endorsed a proposal to invite tenders for the renewal of a period contract for X Consumables for NSW Government Agencies and other eligible organisations.

A TET, comprising Department Of Services, Technology & Administration (NSW Procurement) and client representatives has been formed to oversee this tender process. The TET membership is listed in Appendix A.

Draft RFT documents, including the evaluation criteria to apply, were submitted to the TET for consideration and were subsequently endorsed by the TET and approved by NSW Procurement management.

The [Industry Capability Network](#) (ICN) office and key potential suppliers were consulted regarding the draft RFT documents. The ICN and suppliers comments were taken into account in the specifications in the RFT documents.

The agreement with the selected tenderers will be for a period of three years with an option to extend for a further 12 months. A panel of Contractors will be selected and the number of Contractors selected will depend on the quality of tenders received.

2. MANAGEMENT OF THE EVALUATION PROCESS

The relevant roles and responsibilities of participants in the tender evaluation are as follows.

2.1 Tender Evaluation Team (TET)

The roles and responsibilities of the TET are detailed in the TET/CRG Guidelines.

The TET will be responsible for formulating and making recommendations on the selection of the successful tenderers for referral to the SCCB. In formulating its recommendations, the TET is to:

- evaluate tenders in accordance with the Tender Evaluation Plan and Departmental guidelines and procedures;
- pass over any seriously non-conforming tenders or other tenders in extenuating circumstances;
- conduct technical appraisals of tendered products/services and assess tenderers' ability to meet the requirements of the agreement;
- evaluate tenders using the evaluation criteria and information sought as set out in the RFT documents;
- determine those tenderers that offer the best value for money; and
- recommend acceptance of the best tenders in accordance with the evaluation criteria.

2.2 State Contracts Control Board (SCCB)

The responsibilities of the SCCB or delegate are to:

- conduct a final review of the TET's recommendations; and
- approve, subject to Minister's concurrence if necessary, the TET's recommendation/s after confirming that the tender process has been conducted in a manner that satisfies the requirements of the Public Sector Management (Goods and Services) Regulation 2000.

3. THE TENDER EVALUATION PROCESS

3.1 Evaluation Objectives

The objectives of the evaluation are to:

- select the tenderers offering the best value for money for the products/services; and
- select the successful tenders in a rational and transparent way, which is fair to all tenderers.

3.2 Evaluation Criteria and Weightings

The evaluation criteria and their weightings are shown in Appendix B and the basis for evaluating each criterion is shown at Appendix C.

3.3 Evaluation of Tenders

The evaluation will comprise seven stages:

Stage One: Initial Cull

This phase commences with tender opening by a Tender Opening Committee (TOC) arranged by DSTA's Tender Opening Office. A schedule will be prepared by the TOC, which identifies the tenders received as well as those received late. Any circumstances with late tenders will be noted on the schedule and the schedule forwarded to the nominated TET representative.

An initial review will be conducted by the TET to identify any seriously non-conforming tenders. Tenders not following the instructions set out in the RFT documents, or tenders that clearly are not meeting an acceptable standard warranting further detailed evaluation, will be passed over.

Tenders that fail to meet any of the mandatory criteria will be removed from any further consideration. This may include:

- Completion of a Price Schedule.
- Compliance with the [NSW Government Code of Practice for Procurement](#).
- Agreement to pay the Management Fee if applicable
- Tendering deliverables fully complying with mandatory detailed specifications.
- Compliance with Occupational Health and Safety, and work place injury management, statutory obligations
- Completion of Part C5, Acknowledgment and Confirmation of Tender.
- Tendering deliverables that meet the applicable Australian or nominated overseas or international standard(s), (wherever applicable).

Stage Two: Detailed Evaluation

This stage of the evaluation will require detailed analysis of the tenders and preparation of appropriate documentation by the TET.

The RFT documents allow tenderers to tender for the items within each of a number of the sub-categories, which are:

SUB-CATEGORY AND ITEM NUMBER	SAMPLE ITEM DESCRIPTION FOR 'X'
1.	Kraft Bags
1.01	Bleached, Plain, Ungummed, Without Print, Full Size Range
1.02	Bleached, Gummed, Full Size Range
1.03	Pre-Printed, Bleached, Gummed, Full Size Range
2.	Kraft Rolls
2.01	Bleached, Full Size Range
3.	Flexible Packaging
3.01	Roll, Paper with Transparent Tinted Laminate, Full Size Range
3.02	Paper Laminate Pouch, Full Size Range
3.03	Non-Woven Laminate Pouch, Full Size Range
3.04	Paper Laminate Self-Seal Pouch, Full Size Range
3.05	Non-Cellulose Laminate Roll, Flat, Full Size Range
3.06	Non-Cellulose Laminate Pouch, Full Size Range
4.	Rigid Container Consumables
4.01	Filters, Circular, Non Woven, Full Size Range
4.02	Filters, Rectangular, Non Woven, Full Size Range
4.03	Filters, Square, Non Woven, Full Size Range
4.04	Locks, tamper evident, for Reusable Rigid Container Systems
4.05	Sterilisation Indicators, for Container Systems
4.06	Identification Tags, for Container Systems
5.	Pressure Sensitive Tape
5.01	Pressure Sensitive Tape, for Steam Sterilisation, Non Indicating, for non-woven, Full Size Range
5.02	Pressure Sensitive Tape, for Steam Sterilisation, Indicating, for Linen/Paper, Full Size Range
5.03	Pressure Sensitive Tape, for Steam Sterilisation, Indicating, Full Size Range
5.04	Pressure Sensitive Tape, for Ethylene Oxide Sterilisation, Indicating, Full Size Range
5.05	Pressure Sensitive Tape, for Hydrogen Peroxide Plasma Sterilisation, Indicating, Full Size Range
5.06	Pressure Sensitive Tape, for Steam Sterilisation, Indicating, Pre Printed, Full Size Range
6.	Dust Cover
6.01	Bags, Polyethylene, Pre Printed, Full Size Range
6.02	Rolls, Polyethylene, Pre Printed, Full Size Range
7.	Bowie & Dick Type Tests
7.01	Bowie & Dick Type Test Pack Kit, Single Use
7.02	Bowie & Dick Type Test Pack Kit, Reusable
7.03	Indicating Strip for Bowie & Dick Type Test
7.04	Refill Pack for Bowie & Dick Type Cube Type Test
7.05	Bowie & Dick Type Test for non-plumbed bench top pre-vacuum sterilisers
8.	Chemical Process Indicator Strip
8.01	Chemical Process Indicator Strip, Steam Sterilisation (Class 4-5)
8.02	Chemical Process Indicator Strip, Steam Sterilisation, Emulator (Class 6)
8.03	Chemical Process Indicator Strip, Ethylene Oxide
8.04	Chemical Process Indicator Strip, Hydrogen Peroxide
8.05	Chemical Process Indicator Strip, Peracetic Acid

9.	Biological Related Enzyme and Spore
9.01	Biological Related Enzyme and Spore for Steam Sterilisation, full range
10.	Biological Indicators
10.01	Biological Indicators, Steam Sterilisation, Prevacuum, pre-assembled test pack
10.02	Biological Indicators, Steam Sterilisation, Prevacuum, unpacked
10.03	Steam Sterilisation, non-jacketed (flash), Gravity Downward Displacement Sterilising (DDS)
10.04	Steam Sterilisation, jacketed, Gravity Downward Displacement Sterilising (DDS)
10.05	Ethylene Oxide Sterilisation
10.06	Hydrogen Peroxide Plasma Sterilisation
10.07	Peracetic Acid Sterilisation
11.	Chemical Sterilants
11.01	Hydrogen Peroxide, for Sterrad Systems
11.02	Ethylene Oxide, 100%
11.03	Peracetic Acid, for Steris System 1
12.	Instrument Cleaning Brush
12.01	Rust Resistant, Synthetic Tuft, Full Size Range
12.02	Rust Resistant, Metal Tuft, Full Size Range
13.	Instrument Protectors
13.01	Small, Paper/ Laminate, Full Size Range
13.02	Medium, Paper/ Laminate, Full Size Range
13.03	Large, Paper/Laminate, Full Size Range
14.	Tray Liners
14.01	Low shedding, small, full size range
14.02	Low shedding, medium, full size range
14.03	Low shedding, large, full size range
15.	Wraps
15.01	Wraps, Sterilisation, Single Use, polypropylene, Full range Standard Strength
15.02	Wraps, Sterilisation, Single Use, polypropylene, Full range Medium Strength
15.03	Wraps, Sterilisation, Single Use, polypropylene, Full range Heavy Strength
15.04	Wraps, Sterilisation, Single Use, cellulose, Full Range Standard Strength
15.05	Wraps, Sterilisation, Single Use, cellulose, Full Range Medium Strength
15.06	Wraps, Sterilisation, Single Use, cellulose, Full Range Heavy Strength
16.	Date/Batch Labelling Guns
16.01	Date/Batch Labelling Guns
17.	Date/Batch Labels
17.01	Piggy-Back Indicating
17.02	Piggy-Back Non-Indicating
17.03	Plain Indicating
17.04	Plain Non-Indicating
18.	Soil Removal Challenge Test
18.01	Simulated Soil Removal Challenge Test

The tenders will be scored and ranked as follows:

Step 2a Score each tender against the evaluation criteria shown in Appendix B using the approach for scoring against criteria in Appendix C.

Calculate a Quality Score for each tenderer using the criteria weightings shown in Appendix B and the scores given. The highest score will represent the highest quality or best non-price tender.

Step 2b Determine best pricing scenario by taking:

- (a) Initial price for each of the products offered; allowing for
- (b) Local Jobs First Plan requirements; and
- (c) Settlement Discounts.

Step 2c Determine the price index as follows.

- (a) For each sub-category the tendered rates for each item are added and multiplied by the number of products tendered to give an average price for each.
- (b) This calculation is repeated for each tender.
- (c) The average prices for each tender is then divided by the lowest average price thus determining the Price Index.
- (d) Where categories are either new or not considered high use, the TET may consider recommending all acceptable products are placed on Contract.

Step 2d For each tender, calculate the Relative Value Cost (RVC) for each sub-category where -

$$\text{RVC} = \frac{\text{Quality Score}}{\text{Weighted Price Index}}$$

The tender giving the highest RVC will be deemed to offer the best value for money for each sub-category.

Stage Three: Site Visits

If necessary, tenderers may be subject to a site visit attended by TET members where TET members wish to clarify the information provided in the tender.

Stage Four: Financial Viability

Some financial information will be provided with tender submissions. Should financial analysis be required, Kingsway Financial Assessments Pty Ltd or Corporate Scorecard Pty Ltd may be utilised. This evaluation will be scored as either satisfactory or unsatisfactory. Unsatisfactory tenders may be passed over if risks identified in the assessment are unacceptable or cannot be managed.

Stage Five: Recommendations

Successful tenderers will be selected for each of the sub-categories as those with the highest RVC. The TET is at liberty to recommend more than one potential supplier (Contractor) for each sub-category. The TET is also at liberty to recommend that all tenderers are selected for sub-categories that are new so that the client's needs can be met.

Stage Six: Final Reporting

The evaluation will conclude with an evaluation report and recommendation prepared by the TET, and submitted to a reviewing body (where appropriate). Once concurrence has been obtained from the reviewing body, NSW Procurement will prepare a submission for the consideration of the SCCB, including the TET recommendation and this concurrence, and detailing the tenders that are recommended as representing the best value for money.

APPENDIX A:

MEMBERSHIP OF Tender Evaluation Team (Example Only)

1. Senior Procurement Specialist, NSW Procurement
2. Procurement Specialist, NSW Procurement
3. Client Representative
4. Client Representative

APPENDIX B:**SAMPLE EVALUATION CRITERIA AND WEIGHTINGS**

Criterion	Weight	Total
12 FITNESS FOR PURPOSE		
Product Design may include sealing ability, ease of opening, colour (pre and post sterilisation), pack size, folding, wrapping, drapeability, leaching, strength, minimum shedding.	Insert	
12.4 Other certification requirements	Insert	
12.5 Guarantees and servicing arrangements	Insert	
		Sub Total
14 DELIVERY CONSIDERATIONS		
14.1.1 Delivery Times and 14.1.3 Lead Times	Insert	
14.1.4 Emergency Arrangements	Insert	
		Sub Total
15 CAPACITY TO PERFORM AGREEMENT		
15.3 Human Resource Capability		
15.5 In-service education and training	Insert	
15.9 Other comments on capacity or ability to perform the Standing Offer agreement	Insert	
		Sub Total
17 COMPLIANCE WITH POLICY		
17.7 Value-added activity	Insert	
17.8 Small to Medium Enterprise (SME) involvement	Insert	
17.9 Regional Development	Insert	
		Total
Total		100%

The above weightings represent the following:

Product	Insert Total %
Delivery	Insert Total %
Company Capacity	Insert Total %
Policy Compliance	Insert Total %

APPENDIX C:**APPROACH FOR SCORING QUESTIONS**

The following five-point scale will be used to ensure consistency during the evaluation stage:

SCORE	RELATIVE MERIT FOR DETERMINING QUALITY SCORE
5	Excellent
4	Very Good
3	Better than average
2	Acceptable
1	Marginally adequate only
0	Fails to satisfy requirements

APPENDIX D:**BASIS OF EVALUATION**

12	Fitness for Purpose	
12.1	Quality Certification	Information
12.2	Quality Assurance	Information
12.3	If certification is being sought	Information
12.4	Other certification requirements	Assessable
12.5	Guarantees and servicing arrangements	Assessable
12.6	Packaging	Information
12.7	Other comments	Information
13	Pricing and related factors	
13.1	Price Schedule	Mandatory
13.2	Selected Price Schedule	Not Used
13.3	Price Basis	Information
13.4	Settlement discounts	Assessable
13.5	Other discounts	Desirable/Assessable
14.	Delivery Considerations	
14.1	Delivery times	Assessable
15.	Capacity to perform agreement	
15.1	Years in business	Information
15.2	Technical, warehousing, inventory and distribution capability	Information
15.3	Human Resource Capability	Assessable
15.4	Help Desk Access	Information
15.5	In-service education and training	Assessable
15.6	Financial viability	Mandatory
15.7	Information on dealers, distributors and sub-contractors	Information
15.8	Suitability of proposed dealers, distributors and sub-contractors	Information
15.9	Other comments on capacity/ability to perform the Standing Offer agreement	Assessable
16	Compliance with proposed agreement	Mandatory
17	Compliance with policy	
17.1	Code of Practice and Code of Tendering	Mandatory
17.2	Not Used	
17.3	Purchasing Preference Scheme	Information
17.4	Not Used	
17.5	Not Used	
17.6	Not Used	
17.7	Value Added Activity	Assessable
17.8	Small to Medium Enterprise (SME) involvement	Assessable
17.9	Regional Development	Assessable
17.10	Not Used	
17.11	Innovation, research and development	Information
17.12	Workforce Development	Information
17.13	Not Used	
17.14	Occupational Health Safety & Rehabilitation	Mandatory
17.15	Environmental Management	Information
17.16	Not Used	
17.17	Electronic Commerce	Information

18.	Compliance with relevant legislation and standards	Information
19.	Compliance with other Board Requirements	Information
20.	Previous contract experience and standard of performance	
20.1	Previous contract experience	Information
20.2	Previous experience in provision of Deliverables	Information
20.3	Previous performance of Standing Offer agreements	Information
20.4	Referees	Information
21.	Other information required	
21.1	Details of ownership	Information
21.2	Contracting as agent/trustee	Information
21.3	Current Legal Proceedings	Information
21.4	Cataloguing	Information
21.5	Not Used	
21.6	Not Used	
21.7	Addenda to this RFT after issue	Information
21.8	Further information	Information
21.9	Tender validity period	Information
21.10	Not Used	
21.11	Overall Savings Achieved by your Tender	Information
22.	Tenderer Identification Details	Information
PART C2	Statement of Compliance with Specification	Information
PART C3	Price Schedule	Mandatory
PART C4	Certification of Compliance to relevant Standards	Information
PART C5	Acknowledgment and Confirmation of Tender	Mandatory

APPENDIX E:

EVALUATION SCHEDULE

Invitation to tender was issued on (insert date).

The selected tenderer/s are required to put in place all resources, systems and procedures to enable them to provide the full range of goods commencing (insert date).

The major milestones in the evaluation of tenders and awarding and start-up of the contract are as follows:

1. Complete TEP (insert date)
2. Initial meeting of TET and sign off of TEP (insert date)
3. Tenders close (insert date)
4. TET meetings (insert date)
5. Detailed evaluation complete (insert date)
6. TET meeting to agree on recommendation document (insert date)
7. Tender recommendation made by TET (insert date)
8. SCCB Approval (insert date)
9. Execution of formal agreements (insert date)
11. Start of contract operation (insert date)