

## **TENDER EVALUATION PLAN**

Sample Tender Evaluation Plans are provided in Appendix 7 as indicated below. These samples are not exhaustive. Their purpose is to provide guidance for those looking to establish a Tender Evaluation Plan (TEP) by identifying the basic components that should be covered in particular circumstances.

The level of detail required in the TEP generally depends upon the size and complexity of the tender process involved. There may be elements not specifically covered in the samples that will be essential in evaluating more complex, high risk and high contract value tender processes, and these must be covered in the TEP. There will be more straightforward tender processes that will not need a TEP with all the components covered in the samples.

It should be remembered that the Department undertakes a wide variety of procurement, and the following samples included may not be relevant to all of these.

- (i) Goods & Services – Standing Offer Contract
- (ii) Consultant Engagement System Using Two Envelope System  
(with price and non price evaluation criteria)
- (iii) Construction Contract  
(with price and non-price evaluation criteria)
- (iv) Construction Contract  
(simpler processes)

A tender evaluation process is one phase of a procurement process, but it is also a small project. It should be managed using project management techniques, including implementing, developing and maintaining an appropriate project plan. For a tender evaluation, this is the Tender Evaluation Plan.

A TEP sets out how the evaluation is to be conducted. Like any effective plan, it must be specific to the task and be executable. The TEP and the RFT documents must be consistent.

The TEP must define:

- on what basis tenders will be passed over, and excluded from further consideration, and at what point such a decision should be made;
- how non-compliances will be dealt with;
- how value for money will be assessed; and
- how probity and fairness will be ensured with the evaluation.

The TEP must also:

- recognise the evaluation criteria from the conditions of tendering and any criteria weightings;
- relate the information sought from tenderers to each criterion identified; and
- address the means by which each criterion will be assessed, where it must be explicit about:
  - what will be done;
  - how it will be done;
  - when it will be done; and
  - who is responsible for doing it.

The level of detail in a TEP depends on:

- how experienced the evaluators are;
- the type of evaluation required; and
- how well documented the evaluation process is otherwise.

If all evaluators are very experienced and/or the process, or parts of the process, are well documented elsewhere and can be referenced, then the TEP can be simpler and refer to the other documents. Many of the processes and steps generally used are comprehensively covered in guidelines, process procedures and sample documents, and may be referenced.

Less experienced evaluators could be encouraged to read key reference material by including it in, or appending it to, the TEP.