

# ITQ Evaluation Guidance For Self-Serve projects

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Striving for excellence



# Evaluation Process



Evaluation of quotations/bids is a fundamental component of efficient procurement processes. In this guide, we will navigate through the intricacies of this practice, highlighting its significance in making informed and objective decisions.



Council officers are responsible for delivering best 'Value for Money' (VfM) and outcomes for the residents of Enfield. Hence it is paramount to evaluate quotations/bids effectively as it will ensure selection of the right suppliers, aligned with Council's objectives and standards.



Through this guide we will uncover best practices, methodologies, and the essential tools to facilitate well-informed decisions. Thank you for joining us on this journey towards procurement excellence.

# Selecting Evaluation Panel



Small group of evaluators is better than a single evaluator (up to 3 officers)



Include a combination of financial, technical, and operational expertise from your department



Evaluators should be provided sufficient training and guidance from the start to help ensure a successful outcome and robust decision



Evaluators should be clear on the evaluation process and project (contract) requirements

# Confidentiality, equality and conflicts of interest



Get the evaluation panel members to complete a 'conflict of interest form' to manage any possible conflicts/risks.



Remind the evaluators of the importance of confidentiality – bids contain commercially sensitive information.



Importance of equality – treat all bids fairly and equally, be aware of unconscious bias.



Remember: In case of a challenge or Freedom of Information (FOI) request, the above will protect you and help you demonstrate a fair bid evaluation process.

# Preparing for evaluation



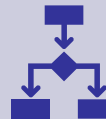
Brief evaluators before starting evaluations. If required, request briefing support from Procurement Services in good time.



After the Invitation to Quote (ITQ) submission deadline, download all responses from LTP project.



All responses/quotations must be evaluated fairly and equally.



Keep detailed and accurate records of your evaluation process – this will help you if a bidder challenges the award decision or submits a FOI request.

# Scoring Responses



Evaluators should be clear on the scoring criteria/marketing scheme before starting the evaluations



The Evaluation panel must keep a copy of their evaluation and any moderation records throughout the process.



Evaluators must allocate scores in accordance with the evaluation criteria set out in the Invitation to Quote (ITQ) documents.



Evaluators must assess against the scoring criteria and not compare submissions or introduce undisclosed criteria

# Record keeping/audit trail



Keep a detailed record of the bid evaluation process. Your record keeping should provide clear evidence to show:



How the evaluation criteria was applied during evaluation and the objective reasons for each score



What could have led to a higher score (if applicable for feedback)?



Record of moderation evidencing rationale and final consensus scores

# Key to successful evaluation

## Ensure

- All evaluators understand the process and their responsibility.

## Equal & Fair Treatment


- All bidders and submissions must be treated fairly and equally.


## Record Keeping


- Keep detailed records of the evaluation process.





# Moderate Evaluators scores


 After completing evaluations, evaluation panel scores should be moderated to arrive at consensus scores. Panel scores must never be averaged!

 Moderation is done to review the scores and reach a justifiable consensus and final score for each response

 The moderator should not be someone from the evaluation panel

 Remember: It is not unusual to see similar or contrasting scores.

 Moderation process should be recorded, and evaluators should review and sign-off evaluation records and final scores.

 Price scoring may need to be checked/verified by finance colleague involved in your project.

# Completing an award report



Lastly, document the evaluation & moderation process outcome records for your proposed award.



Upload scores and moderation records to LTP project.



Complete the appropriate approval (e.g. ROD or DAR) and obtain sign-off from the relevant decision taker.



This will help with internal audit as well as if one of the bidders challenges the award decision.

# Awarding the Contract

