Evaluation Report

[Insert title of procurement]

# BackGround

On [insert date], [insert State Agency name] issued a Request for Quote (Request) for the above procurement.

The Request was advertised as an open request on Tenders WA.

*Or*

The Request was not publicly advertised.

At the Request Closing Time, [insert date], [insert number] Offers were received as follows:

|  |
| --- |
| 1. [insert name]
 |
| 1. [insert name]
 |
|  |
|  |

# Compliance AND DISCLOSURES

The procurement was conducted in accordance with the [Western Australian Procurement Rules](https://www.wa.gov.au/government/publications/western-australian-procurement-rules) using the Request for Quote document. An Acceptance of Offer letter will be used to enter into an arrangement with the recommended Respondent/s. Late submissions were handled in accordance with the requirements of the Request Conditions.

The following non-compliance and/or disclosures were also considered by the Evaluation Panel.

*And*

This non-compliance and/or disclosures were not considered material. [Insert name of Respondent(s)] Offer(s) were further evaluated.

*Or*

This non-compliance and/or disclosures were considered material. [Insert name of Respondent(s)] Offer(s) were not further evaluated.

|  |  |
| --- | --- |
| [insert name] | [insert non-compliance and/or disclosure made] |
|  |  |
|  |  |
|  |  |

# Evaluation Methodology

Offers were evaluated against the criteria stated in the Request to determine the best value for money outcome for [insert title].

The criteria for evaluation were the:

1. Suitability of the proposed Goods and/or Services offered;
2. Respondent’s proven capacity to provide the requirement; and
3. Total costs to be incurred by the Contract Authority*<delete the following if not applicable>*, adjusted for any applicable imported content imposts and/or regional price preferences.

Refer to section 5 for the members of the Evaluation Team.

# Findings of The Evaluation Team

To achieve consistency each Evaluation Team member used the *Individual Evaluation Worksheet Template* to conduct their evaluation. The evaluation results were then discussed by the Evaluation Team and consensus obtained in relation to the merits of each Offer. The outcome of the consensus discussion is documented in the Consensus Evaluation Worksheet at **Appendix 1**.

The remaining Offers were not ranked in order of merit.

# Recommendation

The Evaluation Team found that the Offer from [insert supplier name] represents the best value for money and therefore unanimously recommends that a Contract be entered into with this Respondent/s.

*<Include the following text if the contract delivery point is outside the Perth Metropolitan Area and the recommended Offer is from an eligible regional business, i.e. they were eligible to receive the Regional Business Preference>*The recommended Respondent is an eligible regional business, located within the prescribed distance of the contract delivery location.

*<Or include and edit the following text if the* *contract delivery point is outside the Perth Metropolitan Area; the recommended Offer is from a business located outside the prescribed distance,* ***and*** *offers received from businesses located within the prescribed distance were unsuccessful>*[Insert justification for not recommending Offer(s) from businesses within the prescribed distance].

The proposed Contract will commence on [insert date] and will continue until the [insert ‘Goods’ *or* ‘Services’ *or* ‘Goods and services’] are delivered.

*Or*

The proposed Contract will commence on [insert date] and will expire on [insert date].

*Or*

The proposed Contract will commence on [insert date] for a duration up to [insert term] with a contract extension option of [insert term]. Approval to exercise any contract extension will be sought prior to extending the arrangement.

The total cost for the contract term [(including any extension options)] is [insert value] (inclusive of GST). *<Note: Do not include imported content or regional price preferences in this value, as these are applied for evaluation purposes only.>*

The estimated maximum expenditure, including possible extensions, will be as follows:

|  |  |
| --- | --- |
| **Financial Year** | **Amount** |
| [insert year] | [insert amount] |
| [insert year] | [insert amount] |

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Name** | **Position Title** | **Branch and Division / Organisation** | **Role** | **Signature** | **Date** |
| [insert details] | [insert details] | [insert details] | Chairperson |  |  |
| [insert details] | [insert details] | [insert details] | Team Member |  |  |
| [insert details] | [insert details] | [insert details] | Subject Matter Expert |  |  |

**Approved by:**

[insert delegate signature block]

**Approval to Enter into a Contract**

Consensus Evaluation Worksheet

[insert title of procurement]

Summary of Offers

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Supplier Name** | **Supplier Location** | **Was the Offer lodged on time?\*** | **Did the Respondent’s Offer meet the Pre-Qualification Requirements?\*** | **Was the Offer quoted in $AUD?\*** | **Was the Offer compliant with the Simple Contract Terms?** | **Is the Respondent a debarred or suspended supplier within the meaning of the *Procurement (Debarment of Suppliers) Regulations 2021*?\*** | **Did the Offer contain any Disclosures that present risk to your agency?** | **Action** |
| [insert supplier name] | [insert supplier location] | Choose an item. | Choose an item. | Choose an item. | Choose an item. | Choose an item. | Choose an item. |  |
| [insert supplier name] | [insert supplier location] | Choose an item. | Choose an item. | Choose an item. | Choose an item. | Choose an item. | Choose an item. |  |
| [insert supplier name] | [insert supplier location] | Choose an item. | Choose an item. | Choose an item. | Choose an item. | Choose an item. | Choose an item. |  |
| [insert supplier name] | [insert supplier location] | Choose an item. | Choose an item. | Choose an item. | Choose an item. | Choose an item. | Choose an item. |  |
| \*A ‘no’ response to the first three questions will automatically eliminate the Offer from further consideration.A ‘no’ response to compliance with the Simple Contract Terms will eliminate the Offer from further consideration unless the option for departures was included in the Request.The Customer must exclude from consideration any Offer received from a Respondent who is suspended or debarred, and any Offer which includes a subcontracting arrangement with a suspended or debarred subcontractor. Refer to the [Western Australian Supplier Debarment Regime](https://www.wa.gov.au/government/publications/debarment-regime-guide-western-australian-government-agencies) and the [Excluded Suppliers](https://www.tenders.wa.gov.au/watenders/news/browse.do?CSRFNONCE=BC47BF6C8B895C8C0C0CB75B4FF0C4AF&&ss=1) page on Tenders WA for more information.A yes in the Disclosures column may exclude an Offer from further consideration if you believe the risk is unable to be mitigated satisfactorily. |

Offer Evaluation

The following [insert number] Offer[s] were fully evaluated:

**[insert supplier name]**

| **Evaluation Criteria** | **Overall Evaluation** |
| --- | --- |
| **Suitability of Proposed Goods and/or Services** | **Organisational Capacity, Experience and Specified Personnel** | **Total Costs for Evaluation Purposes** | **Value for Money Assessment** |
|  |  |  |  |
| Choose an item. | Choose an item. | Choose an item. | Choose an item. |
|  |  |  |  |
| [Provide specific details to justify your rating above] | [Provide specific details to justify your rating above] | [Provide specific details to justify your rating above. Note any imported content imposts or regional price preferences, where applicable] |  |
|  |  |  |  |

**[insert supplier name]**

| **Evaluation Criteria** | **Overall Evaluation** |
| --- | --- |
| **Suitability of Proposed Goods and/or Services** | **Organisational Capacity, Experience and Specified Personnel** | **Total Costs for Evaluation Purposes** | **Value for Money Assessment** |
|  |  |  |  |
| Choose an item. | Choose an item. | Choose an item. | Choose an item. |
|  |  |  |  |
| [Provide specific details to justify your rating above] | [Provide specific details to justify your rating above] | [Provide specific details to justify your rating above. Note any imported content imposts or regional price preferences, where applicable] |  |
|  |  |  |  |

**Evaluation Ratings**

The evaluation criteria are not weighted.

The following ratings were applied to each of the evaluation criteria:

**Very Good**: The Offer satisfies the evaluation criterion to a very high standard and presents minimal or no risk to the State and its claims are fully supported by the information provided.

**Good**: The Offer satisfies the evaluation criterion to a high standard and/or presents limited risk to the State. The Respondent’s claims are supported by the information provided.

**Satisfactory**: The Offer satisfies the evaluation criterion to a satisfactory degree and/or presents an acceptable level of risk to the State. There are some minor deficiencies and shortcomings in the information provided.

**Poor**: The Offer barely satisfies the evaluation criterion and/or presents some degree of unacceptable risk to the State. There are major deficiencies in the information provided.

**Unsatisfactory**: The Offer does not satisfy the evaluation criterion and/or presents an unacceptable level of risk to the State.