Text Legend Delete this legend before finalising the document

Red text is an instruction and should be deleted after reading

Blue text should be edited or deleted as required. Change Blue text to Black if keeping

Black text should generally be considered as fixed text

[Goods and Services procurement templates - Evaluation Handbook]

Evaluation Handbook

A Guide for Evaluation Panel Members

**Title:**

[Insert Title Here]

**Request Number:**

[Insert Request Number Here]

**State Agency:**

[Insert State Agency Name Here]

**Evaluation Panel Contact Person:**

**Name:** [Insert Contact Name]

**Telephone:** [Insert Contact Telephone Number]

**Email:** [Insert Contact E Mail]

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# 1. Overview

## 1.1 Background

The purpose of this evaluation handbook is to assist members of the evaluation panel to assess submissions to a Request. The evaluation handbook provides information in relation to:

1. The evaluation process and timetable of events;
2. Scoring responses and procedural fairness;
3. Scoring sheets; and
4. The declaration of interest and confidentiality by each panel member.

## 1.2 Evaluation Panel – Key Objectives

The key objectives of the evaluation panel are to:

1. Make a recommendation, to the Accountable Authority or delegate, as to the Respondent/s that best represents value for money;
2. Ensure the assessment of responses is undertaken fairly according to a predetermined weighting schedule;
3. Ensure adherence to the Western Australian Procurement Rules, procurement directions and other Government procurement policies; and
4. Ensure that the requirements specified in the Request are evaluated in a way that can be measured and documented.

The evaluation panel does not make the contract award decision. The Accountable Authority or delegate makes the final decision and awards the contract. If the Accountable Authority or delegate does not agree with the evaluation panel recommendation then:

* The recommendation can be referred back to the evaluation panel to review/reconsider; or
* The Accountable Authority or delegate can ignore the recommendation and award the contract on the basis of what he/she believes represents better value for money. Detailed supporting documentation on why the Accountable Authority or delegate believes the recommendation should change should be recorded.

## 1.3 Evaluation Panel Members

The evaluation panel should include a range of skills and experience relevant to the nature of the purchase.

For each panel member, a role is to be identified. Some examples of roles include but not limited to:

* as voting members: chairperson, technical and/or specialist expert, procurement representative, independent member, business area expert/representative, contract manager, and
* as non-voting members: facilitator, technical and/or specialist advisor, observer, scribe.

NB: Non-public servants that are engaged to provide technical and/or specialist expertise and/or advice to the evaluation panel, their role should be designated as a ‘technical and/or specialist advisor’ and not have voting rights. Refer to the Evaluation of Offers Guideline available from www.wa.gov.au.

The members of this evaluation panel are:

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Job Title | Agency / Organisation | Role |
| **Voting Members** | | | |
|  |  |  | Chairperson |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
| **Non-Voting Members** | | | |
|  |  |  | Facilitator |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

## 1.4 Responses Received

[List in alphabetical order and include where the responses were submitted from, i.e. Sydney NSW, Perth WA etc]

The following organisations submitted a response:

# 2. The Evaluation Process

### 2.1 Summary

The proposed evaluation process is as follows:

1. Following the closing of requests, panel members will receive a copy of each response with this evaluation handbook;
2. The handbook contains an evaluation scoring sheet and comparative price schedule for each of the Respondents;
3. Panel members will individually score each tender submission using the 0-9 rating scale provided in this handbook;
4. The panel will then meet and reach a consensus score for each response. Where the panel members agree that the submission information provided is unclear, ambiguous or there is an obvious typographical error, the panel members may agree that confirmation or clarification may be sought;
5. If identified as part of the evaluation process and required, the short listing process is conducted;
6. The panel shall reach a consensus as to the recommended Respondent/s and/or preferred Respondent/s;
7. A draft evaluation report will then be written which summarises the evaluation process;
8. Depending on the contract value, the draft evaluation report may need to be submitted to the State Tender Review Committee (if $5,000,000 or more) for endorsement;
9. Panel members, once satisfied with the content of the evaluation report, shall sign off on the evaluation report;
10. The evaluation report will then be considered for Approval by the Accountable Authority or delegate; and
11. Upon approval and finalisation of any outstanding issues, an Award of Contract letter will be issued to the successful Respondent/s.

### 2.2 Timetable

For this Request, the proposed timetable of events is as follows:

| Task | Date |
| --- | --- |
| Handout of responses and evaluation handbooks |  |
| Evaluation panel members individually assess responses |  |
| Evaluation panel consensus meeting to discuss responses |  |
| Clarifications and/or confirmations (if required) |  |
| Short listing process (if identified and required) |  |
| Evaluation report draft prepared |  |
| Evaluation report finalised (following STRC endorsement if applicable) and signed off by each panel member |  |

# 3. Procedures & Principles for Evaluation

### 3.1 Introduction

State Agencies engaged in purchasing Goods and Services from the private sector must ensure that their evaluation process meets appropriate probity ethical standards.

Evaluation panels are part of these processes and therefore, it is important that members of the evaluation panel are aware of the principles of ethical conduct and accountability.

## 3.2 Why Should Evaluation Panel Members be Concerned About Process

There are two main reasons why members of the evaluation panel should be concerned:

1. Respondents are entitled to a fair process; and
2. Failing to follow a fair process may lead to a judicial review, with a re-tender being required – this would be costly in terms of time and resources.

## 3.3 What are the Requirements of Fairness

The following principles must be adhered to in the evaluation process:

### 3.3.1 Appropriate Knowledge

Before commencing on the evaluation process, the evaluation panel and any supplementary members must have an understanding of:

1. The contents of each response;
2. The selection requirements against which responses will be rated; and
3. The process by which each response will be rated.

### 3.3.2 Relevant Considerations

The evaluation panel and any supplementary members should consider all relevant considerations related to each response. This would include the Respondent’s responses to the assessment requirements and all other information Respondents were required to provide. In determining Value for Money, the evaluation panel should also consider any other matters that it considers relevant, e.g. risks associated with the response, financial capacity and capability of the potential supplier.

If information is considered irrelevant, the reason must be stated in the evaluation report.

### 3.3.3 Irrelevant Considerations

The evaluation process must not be based on irrelevant considerations, that is, anything outside the selection requirements or information requested in the Request. This includes hearsay, anecdotes, personal or unsubstantiated views of panel members and information that is not directly relevant to the Request.

### 3.3.4 Bias

The evaluation process must be free of bias and any perception of bias. Any connections between an evaluation panel member and a Respondent must be disclosed to the evaluation panel Chairperson. Evaluation panel members and supplementary members should not accept gifts from Respondents and should limit contact with Respondents during the evaluation process.

Any possible issue of bias should be discussed with the evaluation panel Chairperson as soon as it arises.

### 3.3.5 Evidence of Probity

Evaluation ratings and selections must be made on the basis of the material requested and included in the response together with information obtained through meetings, presentation and clarifications.

### 3.3.6 Confidentiality

The contents of each response should not be disclosed to any party outside of the formal evaluation process. Each response should be viewed as commercially confidential information. As such, the facilitator of the evaluation panel should collect all responses and completed evaluation handbooks after the final evaluation meeting.

### 3.3.7 Commenting During the Evaluation Process

The evaluation panel Chairperson is the only person permitted to comment to outside parties about the evaluation process and outcome. The evaluation panel and any supplementary members should not discuss any element of the evaluation process with work colleagues or any other party.

### 3.4 Recording of Response Scores

The evaluation panel and any supplementary members must fully record their evaluation against the assessment requirements.

### 3.5 Conclusion

By observing and implementing these guidelines, the evaluation panel and any supplementary members will ensure that the evaluation process is ‘visible’, defensible and auditable.

Following these guidelines not only ensures that the evaluation process is fair, but also helps to ensure that the best value for money outcome is achieved.

# 4. Scoring the Submissions

### 4.1 Summary

In this section information will be provided as to:

1. The concept of value for money and the Western Australian Social Procurement Framework;
2. Assessing the different components of the responses; and
3. The scoring rating scales.

### 4.2 Achieve Value for Money

Achieve Value for Money is a key [Western Australian Procurement Rule](https://www.wa.gov.au/government/publications/western-australian-procurement-rules). It ensures that when purchasing Goods or Services, State Agencies achieve the best possible outcome, for every dollar spent, by assessing the overall costs and benefits to government and the community, rather than simply selecting the lowest purchase price. In assessing the overall costs and benefits to government and the community, the [Western Australian Social Procurement Framework](https://www.wa.gov.au/government/publications/western-australian-social-procurement-framework) elements, as outlined below, are taken into account.

Value for Money, therefore, focuses on the best outcome for the State as a whole considering price, economic, environmental and social benefits, in addition to the requirements of individual departments.

### 4.3 Western Australian Social Procurement Framework

The [Western Australian Social Procurement Framework](https://www.wa.gov.au/government/publications/western-australian-social-procurement-framework) brings together all relevant Western Australian Government social procurement policies and priorities into one place. The Framework uses the term ‘social procurement’ to encompass all social, economic and environmental benefits enabled through government procurement that lead to the achievement of Community Outcomes.

The WA Social Procurement Framework identifies the WA Government’s Community Objectives and Outcomes. For information on identifying opportunities for a procurement to contribute to Community Objectives and Outcomes and for guidance on implementing these outcomes into a procurement, refer to the [Western Australian Social Procurement Framework Practice Guideline](https://www.wa.gov.au/government/publications/western-australian-social-procurement-framework).

### 4.3.1 WA Buy Local Policy 2022

The [WA Buy Local Policy 2022](https://www.wa.gov.au/government/document-collections/western-australian-buy-local-policy-2022) aims to maximise supply opportunities for competitive local Western Australian businesses when bidding for State Government contracts. The WA Buy Local Policy 2022 is focused upon achieving a value for money outcome for government.

The WA Buy Local Policy 2022 involves an examination, on a case-by-case basis, of the following issues as they relate to tender submissions:

1. the source of the goods, materials and services – the benefits of those businesses that manufacture or assemble goods in regional Western Australia as distinct from simply distributing goods made elsewhere;
2. the degree to which local suppliers and subcontractors are used in the delivery of the contract outcomes;
3. industry development initiatives;
4. skills development initiatives;
5. innovation and research;
6. encouraging bids from Aboriginal businesses, or have in place/ are prepared to consider implementing employment strategies and programs for Aboriginal people; and
7. net benefits to the State including the benefits of maintaining an ongoing, innovative and competitive local business environment.

[delete the following section if the procurement was not subject to WAIPS]

### 4.3.2 Western Australian Industry Participation Strategy (WAIPS)

The WAIPS aims to maximise supply opportunities for competitive Western Australian businesses when bidding for State Government contracts. The WAIPS is focused upon achieving a value for money outcome for government.

The WAIPS involves an examination, on a case-by-case basis, of the following issues as they relate to tender submissions:

1. Where a subcontract model is employed, the degree to which local Industry is given full, fair and reasonable opportunity to participate;
2. promotion of diversification and growth of the local economy by targeting supply opportunities for local industry;
3. providing suppliers of Goods or Services with increased access to, and raised awareness of, local industry capability;
4. encouraging local industry to adopt, where appropriate, world’s best practice in workplace innovation and the use of new technologies and materials;
5. promotion of increased apprenticeship, training and job opportunities; and
6. promotion of increased opportunities for local industry to develop import replacement capacity by giving local industry, in particular small or medium enterprises, full, fair and reasonable opportunity to compete against foreign suppliers of Goods or Services.

For further details on the assessment of the Participation Plan and WAIPS requirements, refer to the current “Agency Guidelines for Assessment of a Participation Plan”. Email [industrylink@jtsi.wa.gov.au](mailto:industrylink@jtsi.wa.gov.au) to obtain a copy of the guide.

[Delete the following section if the procurement was not part of the Gender Equality in Procurement trial led by the Department of Communities as part of Stronger Together: Western Australia’s Plan for Gender Equality and therefore did not contain the Gender Equality disclosure requirement]

### 4.3.3 Stronger Together: Western Australia’s Plan for Gender Equality

The Western Australian Government’s trial of gender equality reporting in procurement is part of Stronger Together: Western Australia’s Plan for Gender Equality (Stronger Together). Stronger Together was launched in March 2020 and is led by the Department of Communities. Stronger Together demonstrates the Western Australian Government’s commitment to advancing gender equality in Western Australia.

Participating agencies of the Gender Equality in Procurement - WA Public Sector Pilot are to refer to the Procurement Guideline issued by Department of Communities for evaluation instructions.

Opportunities for gender equality are recognised as a community objective in the Western Australian Social Procurement Framework. Further information on the trial and the business benefits of gender equality is available [here](http://www.communities.wa.gov.au/genderequalityinprocurement).

## 4.4 Assessing the Responses

Responses are assessed as follows:

### 4.4.1 Pre-Qualification Requirements

Pre-qualification requirements may or may not be specified in the Request. Where they are, an assessment is required to determine whether the Respondent meets the pre-qualification requirements. The pre-qualification requirements are not point scored. Rather, an assessment is made on a “Yes / No” basis. In making this assessment, a Respondent must comply with every detail of every requirement. Failure to answer ‘yes’ to all of the pre-qualification requirements will eliminate the Respondent from further consideration.

### 4.4.2 Compliance and Disclosure Requirements

An assessment is required to determine whether the Respondent meets the compliance and disclosure requirements. The compliance and disclosure requirements are not point scored. Rather, an assessment is made on a Yes / No basis. In making this assessment, a Respondent may not need to comply with every detail of every requirement.

### 4.4.3 Qualitative Requirements

For those Respondents that are compliant, an assessment is then made of each Respondent’s response to the qualitative requirements. A rating scale of 0-9 is used to evaluate each response. In considering the score to be given to a Respondent for each requirement, evaluation panel members should consider:

1. Whether the Respondent understands the qualitative requirement;
2. Whether the Respondent has the capability in relation to the qualitative requirement; and
3. The level of confidence that the evaluation panel has that the Respondent will be able to meet each requirement.

### 4.4.4 Price

A price schedule is included in this handbook. It provides information in relation to the prices submitted by Respondents. Based on the information provided, evaluation panel members should comment on the competitiveness of the prices.

## 4.5 Evaluation Rating Scale

A rating scale of 0-9 will be used for evaluating each submission. Panel members will be required to score each Respondent’s response to the qualitative requirements. The rating scale and a description for the range of scores is shown in the table below. Where the ‘Participation Plan’ is a separate qualitative requirement, panel members will use the rating scale shown in the second table to score that qualitative requirement.

[Delete the last sentence and the second table below if there was no ‘Participation Plan’ qualitative requirement in the Request]

|  |  |
| --- | --- |
| Score | Descriptions |
| **0** | The response **does not** address the qualitative requirement  **or**  The evaluation panel is **not confident** that the Respondent:   * Understands the Request requirements covered by this qualitative requirement; and / or * Will be able to satisfactorily meet the Request requirements covered by this qualitative requirement. |
| **3** | The evaluation panel has **some reservations** whether the Respondent:   * Understands the Request requirements covered by this qualitative requirement; and / or * Will be able to satisfactorily complete the Request requirements covered by this qualitative requirement.   If **Minor** concern: rate higher (4).  If **Major** concern: rate lower (1 or 2). |
| **5** | The evaluation panel is **reasonably confident** that the Respondent   * Understands the Request requirements covered by this qualitative requirement; and / or * Will be able to satisfactorily complete the Request requirements covered by this qualitative requirement to a **reasonable** standard. |
| **6** | The evaluation panel is **confident** that the Respondent   * Understands the Request requirements covered by this qualitative requirement; and / or * Will be able to satisfactorily complete the Request requirements covered by this qualitative requirement to a **reasonable** standard. |
| **7** | The evaluation panel is **confident** that the Respondent:   * Understands the Request requirements covered by this qualitative requirement; and / or * Will be able to satisfactorily complete the Request requirements covered by this qualitative requirement to a **good** standard. |
| **8** | The evaluation panel is **confident** that the Respondent:   * Understands the Request requirements covered by this qualitative requirement; and / or * Will be able to satisfactorily complete the Request requirements covered by this qualitative requirement to a **high** standard. |
| **9** | The evaluation panel is **confident** that the Respondent:   * Understands the Request requirements covered by this qualitative requirement; and / or * Will be able to satisfactorily complete the Request requirements covered by this qualitative requirement to a **very high** standard. |

[If the Request has the ‘Participation Plan’ as a qualitative requirement include the rating scale table as shown below – if not, delete it.]

The rating scale to be used to evaluate the ‘Participation Plan’ qualitative requirement is shown below:

|  |  |
| --- | --- |
| Score | Descriptions |
| **0** | The response **does not** contain sufficient information to make any assessment. |
| **1** | The evaluation panel is **not confident** that the potential supplier understands the requirements of the WAIPS.  **or**  The response **does not** contain sufficient information to demonstrate how the potential supplier will achieve WAIPS requirements. |
| **3** | The response offers **minimal** benefits in relation to the WAIPS.  **or**  The evaluation panel has **some reservations** as to whether the potential supplier will be able to satisfactorily meet WAIPS requirements. |
| **5** | The response offers a **reasonable or average** level of benefits in relation to the WAIPS.  **or**  The evaluation panel is **reasonably confident** that the potential supplier will be able to satisfactorily meet WAIPS requirements to a reasonable standard. |
| **7** | The response offers a **high or above average** level of benefits in relation to the WAIPS.  **and**  The evaluation panel is **confident** that the potential supplier will be able to satisfactorily meet the WAIPS requirements to a high standard. |
| **9** | The response offers a **very high** level of benefits in relation to the WAIPS.  **and**  The evaluation panel is **completely confident** that the potential supplier will be able to satisfactorily meet the WAIPS requirements to a very high standard. |

# 5. Checklist

To ensure that the evaluation process is completed in the most efficient and effective manner, panel members should ensure, prior to the consensus meeting that they have:

1. Received a copy of each response as shown in Section 1.4;
2. Scored each response (using the scoring sheets provided) and taken sufficient notes to explain the scores; and
3. Completed the Declaration of Interest and Confidentiality form or have reaffirmed, in writing, any previous declaration made. Refer to Section 8 Declaration of Interest and Confidentiality of this document.

When required to attend the consensus meeting, the copies of the responses received and the completed scoring sheets are to be brought to the consensus panel meeting.

# 6. Evaluation Score Sheets

The evaluation sheets are shown on the following page.

One evaluation sheet needs to be completed for each Respondent.

Any questions in relation to the scoring sheets or scoring process should be directed to the evaluation panel contact person listed on the cover of this handbook.

|  |  |
| --- | --- |
| Panel Member’s Name: |  |
| Respondent’s Name: |  |

### 1. Pre-Qualification Requirements

There are no pre-qualification requirements.

Or [Delete the one that is not applicable]

The Respondent has complied with the following pre-qualification requirements:

|  |  |  |
| --- | --- | --- |
| Requirements | Response | |
| **Yes** | **No** |
|  |  |  |
|  |  |  |

### 2. Compliance and Disclosure Requirements

The Respondent has addressed the compliance & disclosure requirements as indicated below: [delete the rows that are not applicable]

|  |  |  |
| --- | --- | --- |
| Requirements | Response | |
| **Yes** | **No** |
| Has the Respondent provided sufficient details regarding its identity? |  |  |
| *Unless operation of the Procurement (Debarment of Suppliers) Regulations 2021 has been excluded, the Contract Authority or 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.*  *Ensure that you check the suspension and debarment status of all Respondents and named subcontractors on the* [*Excluded Suppliers*](https://www.tenders.wa.gov.au/watenders/news/browse.do?CSRFNONCE=BC47BF6C8B895C8C0C0CB75B4FF0C4AF&&ss=1) *page before progressing to the Qualitative Assessment, finalising the Evaluation Report and prior to awarding the contract.*  Is the Respondent a debarred or suspended supplier within the meaning of the Procurement (Debarment of Suppliers) Regulations 2021? |  |  |
| **Head Agreement Details** - Does the Respondent agree? |  |  |
| **Customer Contract** - Does the Respondent agree? |  |  |
| **General Conditions and Schedules** – Does the Respondent agree? |  |  |
| **Aboriginal Procurement Policy – Aboriginal Participation Requirements – Does the Respondent agree?** |  |  |
| **If yes, which requirement has the Respondent elected to comply with:**  **Aboriginal Business / ACCO Subcontracting Outcomes**  **Employment of Aboriginal Persons Outcomes** | | |
| Is the Respondent acting as an agent or trustee for another person or persons? |  |  |
| Is the Respondent acting jointly or in association with another person or persons? |  |  |
| Does the Respondent intend to engage a **subcontractor**?  **If yes, does the Respondent’s Offer name a subcontractor that is a debarred or suspended supplier within the meaning of the *Procurement (Debarment of Suppliers) Regulations 2021*?** |  |  |
|  |  |
| If yes, has the Respondent warranted that they have obtained consent from subcontractors permitting them to receive information from the Customer and the Contract Authority as to whether the subcontractor is a suspended supplier within the meaning of the *Procurement (Debarment of Suppliers) Regulations 2021*? |  |  |
| **Criminal Conviction** - Does the Respondent, or any of the Respondent’s senior officers, or any person nominated as Specified Personnel have a Criminal Conviction? |  |  |
| **Conflict of Interest** - Does the Respondent have any actual, potential or perceived Conflict of Interest? |  |  |
| **Small Business** – Is the Respondent a small business? |  |  |
| **Australian Disability Enterprise (ADE)** – Is the Respondent a registered ADE? |  |  |
| **Aboriginal business** – Is the Respondent a registered Aboriginal business?  If Yes, they are registered on:  Aboriginal Business Directory WA (<http://www.abdwa.com.au/>)  Supply Nation’s Indigenous Business Direct (<http://supplynation.org.au/>)  Both  Registration has been verified on: [enter date] |  |  |
| **Aboriginal Community Controlled Organisation – Is the Respondent an ACCO?**  If Yes, did the Respondent provide:  their ACNC registration, and  details of their registration with ORIC, ASIC or DEMIRS, or  an extract of the relevant provisions of their constitution or governing documents |  |  |
| **Credit Card/Purchasing Card Payment** – Does the Respondent agree to receive credit card/purchasing card payments? |  |  |
| Software Licence Agreements – Has the Respondent disclosed the basis of the licensing arrangements and provided copies of the software agreements? |  |  |
| **Competitive Neutrality** - calculated on a full commercial basis? |  |  |
| **Professional Standards Scheme** - Is the Respondent a member of an occupational association for which a scheme has been approved under the Professional Standards Act 1997 (WA) or equivalent? |  |  |
| **Gender Equality in Procurement – WA Public Sector Pilot**  *[Delete this whole section if the procurement was not part of the Gender Equality in Procurement trial as part of Stronger Together: Western Australia’s Plan for Gender Equality and therefore did not contain the Gender Equality disclosure requirement].* |  |  |
| ***[Remove this (A) section if questions are not applicable]* (A) The Respondent is a business or organisation that employs 100 or more people.** |  |  |
| **Does the Respondent comply** with the [Workplace Gender Equality Agency](https://www.wgea.gov.au/what-we-do/reporting#tendering-for-government-contracts) reporting requirements? |  |  |
| Did the Respondent provide a letter of compliance with the *Workplace Gender Equality Act 2012?* |  |  |
| ***[Remove this (B) section if questions are not applicable]* (B) The Respondent is a business or organisation that employs less than 100 people.**  Does the Respondent have any of the following policies/strategies in place to support workplace gender equality? |  |  |
| Audit of salaries/pay rates to identify any gender gaps |  |  |
| Flexible work arrangements for all staff – e.g. flexi-hours, part-time, work from home |  |  |
| Work practices to facilitate family or caring responsibilities e.g. meetings only held during school hours, designated parents’ room |  |  |
| Paid parental leave for either parent when their child is born or adopted |  |  |
| Program to prevent and respond to discrimination in the workplace |  |  |
| Support for victims of sexual or gendered abuse and harassment in the workplace |  |  |
| Consequences for perpetrators of sexual or gendered abuse and harassment in the workplace |  |  |
| Paid family and domestic violence leave |  |  |
| Counselling/support for staff who experience family and domestic violence |  |  |
| Does the Respondent have the required insurances requested? |  |  |
| Public Liability - insert $ amount |  |  |
| Public and Products Liability - insert $ amount |  |  |
| Professional Indemnity - insert $ amount |  |  |
| Workers’ Compensation |  |  |
| Motor Vehicle Third Party Liability - insert $ amount |  |  |
| Does the Respondent need to obtain the required insurances prior to the Commencement Date? |  |  |

### 3. Qualitative Requirements

|  |  |  |
| --- | --- | --- |
| (a) | [Qualitative Requirement and Weighting %]  (i) [Sub-Criterion]  (ii) [Sub-Criterion] | Score (0-9)  [ ] |

Comments:

|  |  |  |
| --- | --- | --- |
|  | | |
|  | | |
|  | | |
|  | | |
|  | | |
| **(b)** | **[Qualitative Requirement and Weighting %]**  **(i) [Sub-Criterion]**  **(ii) [Sub-Criterion]** | **Score (0-9)**  **[ ]** |

Comments:

|  |  |  |
| --- | --- | --- |
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|  | | |
|  | | |
| **(c)** | **[Qualitative Requirement and Weighting %]**  **(i) [Sub-Criterion]**  **(ii) [Sub-Criterion]** | **Score (0-9)**  **[ ]** |

Comments:

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| --- | --- | --- |
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|  | | |
|  | | |
| **(d)** | **[Qualitative Requirement and Weighting %]**  **(i) [Sub-Criterion]**  **(ii) [Sub-Criterion]** | **Score (0-9)**  **[ ]** |

Comments:

|  |  |  |
| --- | --- | --- |
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|  | | |
| **(e)** | **[Qualitative Requirement and Weighting %]**  **(i) [Sub-Criterion]**  **(ii) [Sub-Criterion]** | **Score (0-9)**  **[ ]** |

Comments:

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### 4. Price

Comments about the Respondent’s price submission:

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### 5. Overall Comments

|  |
| --- |
|  |
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|  |

# 7. Comparative Price Schedule

The table below provides a comparative price schedule for each of the Respondents. [Insert as required]

Or [delete the one not required]

A comparative price schedule for each of the Respondents is attached to this evaluation handbook.

# 8. Declaration of Interest and Confidentiality

Conflicts of interest arise where there is a conflict between the performance of a public duty and private or personal interests – and may involve personal financial or political interests. It’s important to remember that conflicts of interest may be actual, perceived or potential.

[Western Australian Procurement Rule B2](https://www.wa.gov.au/government/multi-step-guides/western-australian-procurement-rules/section-b-act-ethically-integrity-and-accountability) requires that officers involved in, or connected to, a procurement activity must declare any conflict of interest (whether actual, potential or perceived) they have in relation to that procurement activity, to their State agency and to the officer leading the procurement activity.

Each evaluation panel member is required to complete the attached Declaration of Interest and Confidentiality form. Once completed, please provide to the nominated panel facilitator. Any conflicts of interest should also be immediately declared by the officer with the conflict, via their State agency’s own conflict of interest declaration channels.

Panel members may have already completed a Declaration of Interest and Confidentiality form if they were involved earlier in the procurement process. Panel members in this situation are to reaffirm, in writing, their declaration to ensure no conflicts have arisen as a result of the submission of offers.

Rule B2 also requires the declaring officer to take all reasonable and necessary steps to manage the conflict as soon as it is known, following their State agency’s conflict of interest procedures. A record of the strategies and actions to manage the conflict should be put on the procurement file by the nominated procurement process facilitator.

There are conflict of interest guidelines available from the Integrity Coordinating Group webpage at [www.wa.gov.au/government/document-collections/integrity-coordinating-group](http://www.wa.gov.au/government/document-collections/integrity-coordinating-group).

For guidance to assist with fulfilling your obligations under the [Western Australian Procurement Rules](https://www.wa.gov.au/government/multi-step-guides/western-australian-procurement-rules/section-b-act-ethically-integrity-and-accountability), please see the “Act Ethically – with Integrity and Accountability” Guideline at <https://www.wa.gov.au/government/multi-step-guides/procurement-guidelines/procurement-planning-guidelines/act-ethically-integrity-and-accountability-guideline>.

Declaration of Interest and Confidentiality

|  |  |
| --- | --- |
| Request Number: |  |
| Request Title: |  |

I (full name)

of (organisation details)

### (Declaration of Interest) [[1]](#footnote-1)

* + 1. Declare that neither I nor any of my immediate family[[2]](#footnote-2) have any interests, pecuniary or otherwise, other than that mentioned below or described in the attached sheet(s), which could reasonably be construed as having any influence on the proper and objective performance by me of my duties in relation to the above specified Request.

***Note*:** *Interests to be declared include but are not limited to: affiliations; conference funding; equipment donations; financial assistance; travel assistance; rebates; hospitality; relationships; shares; company ownership; training and development; consultancy services; gifts; and/or sponsorships.*

Declared Interest:

Additional Information attached? Yes / No (Please circle and initial as applicable)

* + 1. Agree to truthfully declare, in writing to the Accountable Authority or delegate, any changes which may occur that relate to the matters stated in clause 1 of this Declaration, as soon as practicable after I become aware of the same;

### (Declaration of Confidentiality)

* + 1. Agree to keep all information and documents relating to the Request planning, development or evaluation process confidential, and not to disclose or communicate the same to any person or persons except in the course of my duties without the prior written approval of [Insert the name of the State Agency];
    2. Agree not to make copies of, or take any extracts of information except as may be necessary and essential for the due and proper performance of my duties;
    3. (Include this clause if the evaluation panel includes representatives external to the Western Australian State Public Service)Agree to comply with all processes and protocols established by the [Insert the name of the State Agency] from time to time to maintain the confidentiality of information and documentation relating to this project. The processes and protocols will include those for the security of documentation, communications between the [Insert the name of the State Agency] (and its officers, employees and consultants/contractors) and other parties;
    4. Agree to return all documents, papers and other materials (including the evaluation handbook) given to me relating to this project to the nominated panel facilitator immediately when requested to do so; and
    5. Acknowledge that conflicts of interests, breach of confidentiality and unauthorised disclosure are subject to the provisions and penalties contained in the *Public Sector Management Act 1994* and *The Criminal Code*. Unlawful disclosure of official information is a criminal offence punishable by up to three years imprisonment.

*[A declaration may be made using this form without the declarant’s signature being witnessed or counter-signed, but requiring another person to act as a witness or counter signatory provides additional assurance from a governance perspective. For guidance on executing documents electronically, the State Solicitor’s Office has distributed a guidance note to all agencies which contains useful contextual information.]*

This declaration is made by me on the understanding that I will not be taken to have breached its terms if I am legally required to disclose the information referred to.

|  |  |
| --- | --- |
| Signed By:  .......................................................................................................  Declarant Signature | Dated  …………………… |

*[Include the witness block below if the declaration above will be witnessed by another person. It is recommended that wet signatures are witnessed, in person or via audio-visual link, where practical. Delete if not applicable.*

|  |  |
| --- | --- |
| Witnessed By:  .......................................................................................................  Witness Signature  ......................................................................................................  Witness Name and Title (Printed) | Dated  …………………… |

[Include the counter signatory block below if the declaration is to be counter-signed by the panel chair or facilitator. Please note that electronic signatures are generally not able to be witnessed, but may be countersigned. If this form is to be signed electronically, it is recommended the electronic signatures are applied using secure digital signature technology. Delete if not applicable.]

I acknowledge the declaration made above, in my capacity as [describe role, e.g. Request [No.] Evaluation Panel Chairperson].

|  |  |
| --- | --- |
| Countersigned By:  ...................................................................................................  Signature  ..................................................................................................  Name and Title (Printed) | Dated  …………………… |

1. Conflict of interest guidelines available from the [Integrity Coordinating Group](https://www.wa.gov.au/government/document-collections/integrity-coordinating-group). [↑](#footnote-ref-1)
2. Immediate family members are spouses, de factos, children, parents, brothers and sisters. [↑](#footnote-ref-2)