

# School Property Procurement Evaluator Guide

## Procurement help

---

All enquiries should be made to the Procurement Officer as detailed in the Evaluation Plan. This guide should be read in conjunction with the [School Property Procurement Quick Guide.pdf](#) available with other information, templates and guides at: [www.education.govt.nz](http://www.education.govt.nz), search “procurement for school property projects”.

## Procurement principles

---

Evaluators are to apply the following school property procurement principles:

- **Value for Money**  
Identify the outcome that represents the best combination of cost and benefit
- **Fairness**  
Treat all Tenderers equally, honestly and confidentially
- **Transparency**  
Thoroughly document the reasons/rationale for all decisions (e.g. scoring)
- **Impartiality**  
Decisions must be free from bias (Conflict of Interest)
- **Reasonableness**  
Decisions must be logical/rational, proportionate, sensible and drawn from/supported by evidence.

## Basis of Evaluation

---

The purpose of procurement evaluation is to appraise each bid (registration/tender/proposal/quote) to determine:

### 1. **Conformance**

Is the bid:

- Acceptable in terms of meeting the requirement? (Is the proposed solution satisfactory? Does the Tenderer have sufficient capability and capacity to deliver a satisfactory solution?)
- reasonable? (Is the price within market expectations/represent good value for money?)
- acceptable in terms of risk? (Is the level of risk associated with the bid acceptable?)

### 2. **Preference**

Which conforming bid represents the best value for money taking into account:

- whole of life cost
- additional benefit (beyond meeting minimum requirements)
- reduction of risk.

Evaluators are to apply reasoned judgement based on their expertise and experience to:

- **The Bid**  
Evaluation must be based primarily on information provided in the bid
- **Other Information**  
Evaluation may be supplemented by:
  - Referees feedback
  - Additional information obtained from any relevant third party
  - Other relevant information known or obtained. Other Information (other than that in the bid) must:
    - be documented as part of the rationale (the nature and source of the information)
    - factual and verifiable (able to be evidenced)
    - be relevant/applicable
    - not be based on hearsay, conjecture or un-substantiated opinion.

Note: All Tenderers must be treated equitably. Tenderers that evaluators do not have direct experience with must be given the benefit of the doubt and must be not disadvantaged as a result.

## Evaluation criteria

Evaluation is to be based on the following criteria, each of which is to be scored out of ten:

- **Proposed Solution**

The suitability of proposed goods/services/works (deliverables) including:

- the comprehensiveness, deliverability and robustness of the plan for delivering a suitable solution
- method, approach, systems and processes proposed for delivering a suitable solution
- the Tenderer's understanding of the requirement

- **Capability**

The skills and expertise of the Tenderer (including of Key Personnel) required to deliver a suitable solution. Capability is evidenced by:

- relevance and recentness of comparable experience (what they have done)
- quality of track record (how well they have done it)
- suitability of qualifications/accreditations/professional memberships.

- **Capacity**

The Tenderer's resources and availability (including of Key Personnel) required to deliver a suitable solution as evidenced by:

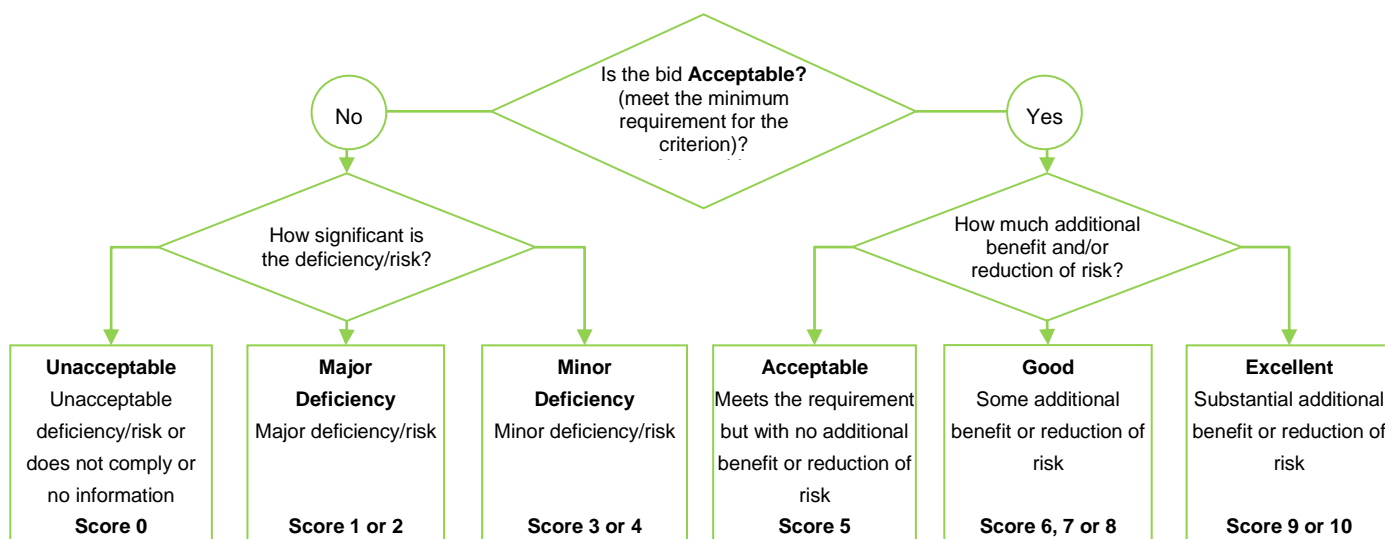
- Sufficiency of resources proposed
- Availability of resources
- Sufficiency of back-up resources (contingency)

- **Price**

## Scoring

Each non-price criterion (see above) is to be scored using the following scale:

Score	Rating	Definition
9-10	Excellent	Exceeds the criterion to provide <u>substantial</u> additional benefit and/or reduction of risk
6-8	Good	Exceeds the criterion to provide <u>some</u> additional benefit and/or reduction of risk
<b>5</b>	<b>Acceptable</b>	<b>Meets the criterion</b>
3-4	Minor deficiency	Does not meet the criterion due to <u>minor</u> deficiency or additional risk
1-2	Major deficiency	Does not meet the criterion due to <u>major</u> deficiency or additional risk
0	Unacceptable	Does not comply, insufficient information or unacceptable deficiency or risk



- A bid with an Evaluation Team score of 4 or less for any non-price criterion may be excluded from further evaluation and/or selection.
- Evaluators should ensure that scoring is sufficiently “granular” to differentiate “Acceptable” bids. That is; evaluators should use the full range of scores for acceptable or better (5-10) to reflect the relative degree to which bids provides additional benefit/reduction of risk.
- Evaluators should endeavour to not give all bids the same or similar scores.

## Evaluation process

The evaluation process will be detailed in the procurement plan and will generally involve:

1. review of tenders by the Procurement Officer and Evaluation Team chairperson for compliance with the procurement process terms and conditions and initial due diligence
2. individual evaluation of tenders for non-price criteria by Evaluation Team members
3. separate price analysis (and tag analysis for Contract Works)
4. Evaluation Team meeting:
  - a. Evaluation Team review consolidated individual scoring and agree team non-price criteria scores by consensus\* (For Contract Works; includes presentation of tag analysis)
  - b. Evaluation Team identify conforming tenders (those that are acceptable/meet minimum requirements)
  - c. presentation of price analysis and price scoring of conforming tenders
  - d. Evaluation Team select the preferred tender and confirm any requirement for additional negotiation/due diligence
5. Procurement Officer drafts Recommendation Report for Procurement Sponsor Approval.

\*If an absolute consensus cannot be reached, a majority consensus should be agreed and the dissenting score and rationale noted.

## Conflict of Interest management

A Conflict of Interest (Col) is a circumstance where someone has an interest, obligation or relationship (personal or commercial) that may influence their performance in a role/position (e.g. as an evaluator). A Col may result in their independence, objectivity or impartiality being called into question. A Col may be:

- actual; the conflict currently exists
- potential; the conflict is about to happen, or could happen
- perceived; another party may reasonably believe that a conflict exists
- positive or negative (e.g. result un-due bias for or against a particular Tenderer).

Everyone involved in a procurement must immediately report any Col that arises at any time during the procurement to the Procurement Officer. A Conflict of Interest and Confidentiality agreement (Col Form) must be submitted to the Procurement Officer:

- Procurement value of \$50,000 or more: by everyone involved (whether or not they have a Col to report)
- Procurement value of less than \$50,000: by anyone with a Col to report.

A Conflict Management Plan will be put in place for any Col identified. Managing a Col may involve:

- Reporting the Col to the Evaluation Team and request that they report any perception of undue bias.
- Restricting the person's involvement in the procurement.
- Recruiting an independent probity advisor (e.g. Property Advisor) to oversee the procurement.
- Removing the person completely from the procurement.
- Relinquishing the conflicting interest (by the person with the Col)
- Resignation of the person resigns from the Ministry/Board.

## Evaluators' duties

---

Evaluators' duties are to:

- be impartial, fair, responsible and trustworthy
- act solely in the best interests of the Ministry and/or the relevant school
- act lawfully and with integrity
- immediately report where fraud and/or corruption is suspected or identified
- immediately report any real, perceived or potential conflicts of interest
- maintain the confidentiality of the procurement process, Tenderers' information, intellectual property and other related information (do not discuss the evaluation with anyone not officially involved in the procurement)
- not accept any gift, hospitality or benefit from any supplier that may submit or has submitted a tender/proposal and immediately report any such instance as a potential COI.
- read the Evaluation Plan and the approach to market document (RFx) to get a clear understanding of the Requirement and how tenders will be evaluated
- thoroughly document the evidence and rationale for scoring
- conduct your individual evaluation independently; do not discuss your individual evaluation with anyone including other Evaluation Team members prior to the Evaluation Team meeting
- document the reasons/rationale for scores and note points for discussion and/or clarification
- ensure that all written comments are appropriate (all written material relating to the procurement is discoverable (subject to an Official Information Act request)).
- Do not contact Tenderers: All requests for clarification must be made through the Procurement Officer.