CONTRACT PROCEDURES MANUAL (SM021) PART A – APPENDIX VII

Evaluation summary forms and guidelines

CONTENTS

The following supplements the definitions in Waka Kotahi's *Procurement manual* – provided to assist evaluators in distinguishing between the terms used on tender evaluation forms and the allocation of an appropriate grade.

A scale of 0 to 100 is to be used, generally in steps of 5 and the groupings defined below.

90, 95 or 100	**– Excellent:**	Only awarded when all requirements are met in an outstanding manner.
		Other definitions include: extremely related, superlative, significantly within budget, consistently ahead of deadline, directly applicable.
75, 80 or 85	**– Good:**	Where requirements are fully covered in all material aspects.
		Other definitions include: very related, exceeds requirements, well within budget, frequently ahead of deadline, very related.
60, 65 or 70	**– Above average:**	Where requirements are adequately covered.
		Other definitions include: particularly related, requirements fully met, within budget, occasionally exceeds.
50 or 55	**– Average:**	Adequate with some deficiencies which are not likely to have any adverse effect.
		Other definitions include: related, acceptable, on budget, on time, meets requirements.
40 or 45	**– Below average:**	Barely adequate and would need minor improvement if selected.
		Other definitions include: barely related, needs improvement, exceeds budget, misses deadline, adequate.
35 or less	**– Poor:**	Generally unacceptable and ruled out of further consideration.
		Other definitions include: not related, unsatisfactory, significantly exceeds budget, frequently misses deadline, barely adequate.

Form A – Relevant experience and form B – Track record

Enter the tenderer name, evaluator name and date, and the description of the five tenderer-nominated projects. For each sub-attribute enter a grade for each project. From the average of these grades, multiplied by the subattribute weight derive a total subattribute grade. If other than average of grades the process should be documented. From the subattribute totals calculate the attribute grade. If no subattribute weights have been specified, the evaluator should still consider the importance of each sub-attribute when deriving an attribute total and document the process.

Form C – Relevant skills

Enter the tenderer name, evaluator name and date, and the names relating to each of the consultant's personnel from the personnel schedule. For each subattribute enter a grade for each person. Each evaluator should consider the relevance of other tenderer-nominated personnel and any other personnel requirements which, from the contract documents should be included for scoring and, the adequacy of nominated personnel in relation to technical/managerial qualifications and experience as required for the position nominated for. After having considered these issues a total subattribute shall be derived and the process should be documented. Use subattribute weights and personnel weights, if specified, to calculate the attribute grade. If no personnel weights have been specified, the evaluator should still consider the importance of each position when deriving an attribute total and document the process.

Form D – Methodology

Enter the tenderer name, evaluator name and date. Enter a grade for each of the factors listed. Evaluators should consider the importance to the contract of each factor when deriving the rating and any weight given. Factor grades are multiplied by the weighting (where given) and the results summed to determine the overall grade.

Forms G – Price quality method: PS / PW

Form G is designed as a spreadsheet and used to calculate consultant / contractor non-price grades, SQP and the preferred tenderer.

Guidelines to use of the price quality method and example calculations are to be found in template *XXV Price quality method guidelines*.

Form I – Brook's law method: PS

Form I is designed as a spreadsheet and used to calculate the tenderer with the highest overall weighted sum of non-price indices and preferred tenderer. The form provides for the preferred tenderers price to be entered and final negotiated price.

Note: Forms A to D may be found in SM030 and forms A to E in SM031 and SM032.