



**PUBLIC PROCUREMENT  
AND DISPOSAL OF PUBLIC ASSETS  
AUTHORITY**

**Local Governments  
(Public Procurement and Disposal of  
Public Assets) Guidelines, 2008**

**JANUARY 2008**

**Local Governments**  
**(Public Procurement and Disposal of Public Assets)**  
**Guidelines, 2008**

*(Under Section 94 of the Local Governments Act, Cap 243 and Regulation 12 of the Local Governments (Public Procurement and Disposal of Assets) Regulations, 2006)*

**These Guidelines are issued by the Public Procurement and Disposal of Public Assets Authority, in consultation with the Ministry of Local Government.**

**An Accounting Officer should ensure that these Guidelines are distributed to all members of the Contracts Committee, the Procurement and Disposal Unit and Heads of User Departments including lower local governments.**

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**Local Governments  
(Public Procurement and Disposal of Public Assets)  
Guidelines, 2008**

**Details covered in this Guideline:**

**Guideline Subject:**                    **Thresholds for Procurement Methods**

**Guideline Reference:**                **No.1/2008**

**Guideline Issue Date:**              **25<sup>th</sup> January, 2008**

## **Guideline Subject: Thresholds for Procurement Methods**

In accordance with **Regulation 33(3)** of the Local Governments (Public Procurement and Disposal of Public Assets) Regulations 2006, the following thresholds shall apply to the procurement methods detailed below:

### **1. Thresholds for Procurement of Works**

- (a) **Open Bidding** shall be used if the estimated value of the procurement exceeds Ug. shs 50,000,000 or USD 25,000 whichever is greater.
- (b) **Selective Bidding** shall be used if the estimated value of the procurement does not exceed Ug. shs 50,000,000 or USD 25,000 whichever is greater.

### **2. Thresholds for Procurement of Supplies and Services**

- (a) **Open Bidding** shall be used if the estimated value of the procurement exceeds Ug.shs. 30,000,000 or USD 15,000 whichever is greater
- (b) **Selective Bidding** shall be used if the estimated value of the procurement does not exceed Ug.shs. 30,000,000 or USD 15,000 whichever is greater

**3. Micro Procurement** may be used if the estimated value of the works, supplies and services does not exceed Ug.shs. 1,000,000 or USD 500.

**4. Community Purchase** may be used if the estimated value of the works does not exceed Ug.shs. 500,000.

**Signed:**



**Chairman of the Board of Directors**



**Executive Director of the Authority**

**Public Procurement and Disposal of Public Assets Authority**

**Local Governments  
(Public Procurement and Disposal of Public Assets)  
Guidelines, 2008**

**Details covered in this Guideline:**

**Guideline Subject:** Minimum Bidding Periods of Procurement Methods

**Guideline Reference:** No. 2/2008

**Guideline Issue Date:** 25<sup>th</sup> January, 2008

**Guideline Subject: Minimum Bidding Periods for Procurement Methods**

In accordance with **Regulation 55 (1)** of the Local Governments (Public Procurement and Disposal of Public Asset) Regulations 2006, the following Minimum Bidding Periods shall apply-

**1. Purpose of the Bidding Period**

The Bidding Period allows potential bidders sufficient time to respond to a bid notice or invitation, prepare and submit a bid to the procuring and disposing entity.

**2. Duration of the Bidding Period**

The Bidding Period shall start on the date the bid notice is first published in a media of wide circulation or issue of the solicitation documents to bidders and shall end on the date for submission of bids by bidders.

**3. Minimum Bidding Periods for Procurement Methods**

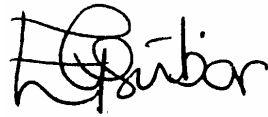
The minimum bidding period for each procurement method shall be as follows-

- (a) Open national bidding, fifteen working days;
- (b) Open international bidding, thirty-three working days;
- (c) Selective national bidding, ten working days;
- (d) Selective international bidding, twenty working days;
- (e) Direct procurement, minimum period not applicable;
- (f) Micro procurement, minimum period is not applicable;
- (g) Community Purchase, minimum period is 2 working days;

**4. Extension of the Bidding Period**

When less than one third of the bidding period is remaining and a procuring and disposing entity amends the solicitation documents by issuing an addendum to bidders, the deadline for the submission of bids shall be extended by a reasonable period to give bidders time in which to take the addendum into account when preparing their bids.

Signed:



**Chairman of the Board of Directors**

**Executive Director of the Authority**

**Public Procurement and Disposal of Public Assets Authority**



**Local Governments  
(Public Procurement and Disposal of Public Assets)  
Guidelines, 2008**

**Details covered in this Guideline:**

<b>Guideline Subject:</b>	<b>Reference Numbers for Procurement and Disposal Transactions</b>
<b>Guideline Reference:</b>	<b>3/2008</b>
<b>Guideline Issue Date:</b>	<b>25<sup>th</sup> January, 2008</b>

## **Guideline Subject: Reference numbers for Procurement and Disposal Transactions**

A Procuring and Disposing Entity is required under the Local Governments (Public Procurement and Disposal of Public Assets) Regulations 2006, to keep records and papers relevant to all procurement and disposal activities.

To enable the management and control of all records in accordance with the Regulations, all files shall be labelled with a unique **Reference Number** to assist in the identifying, tracking, monitoring and audit of activities and in the tracing and maintenance of records and files.

### **1. Accounting Officer**

- 1.1. To enable the system described below to function effectively, Accounting Officers should nominate one official to control and issue the five digit sequential reference number. This official should be located in the Procurement and Disposal Unit of each Procuring and Disposing Entity so that there is one control point for the issue of the sequential numbers. The Official should maintain a register of sequential reference numbers issued recording against each the details of the date, person and department/project and the subject of the procurement or disposal that the number is issued to.
- 1.2. Accounting Officers should advise all members of the Procuring and Disposing Entity that all procurement and disposal must be allocated a Reference Number at the commencement of a procurement or disposal process.
- 1.3. Accounting Officers are required to inform the Chairperson of the Contracts Committee that the Committee should ensure that the provisions of this Guideline are complied with.

### **2. Reference Numbers**

There shall be **two** types of Reference Numbers, one for procurement transactions and the other for disposal transactions. The format and content of each shall be as detailed below.

### **3. Procurement Reference Numbers for procurement transactions**

- 1.4. The Procurement Number shall be allocated when a procurement requisition is raised and used on all correspondence and records related to the procurement requirement.
- 1.5. A Procurement Number shall not be reused where a procurement requirement is cancelled.
- 1.6. In accordance with Regulation 65(3), the following format shall be used for allocating reference numbers to each procurement requirement:

The basic Procurement Reference Number shall consist of **four** parts. In creating a Procurement Reference Number the following process is followed:

- (a) An abbreviation of the District/ Municipality name comprising the 1<sup>st</sup> four letters and a predetermined code for the Procuring and Disposing Entity

which refers to the District/Municipality name and code e.g. Ntun546. This code is included by the initiator of the requirement.

- (b) An abbreviation of up to 5 letters, identifying the requirement as the procurement of Works, Services or Supplies i.e. **Wrks, Srvc, Supls** respectively. This is included by the initiator of the requirement.
- (c) The Budget Year, e.g. 06/07; is included by *the initiator of the procurement requirement*. (Note this is the year that the requirement is initiated and is not intended to be the financial or budget year in which the procurement is expected to be paid);
- (d) A five-digit unique number allocated sequentially from 00001 onwards. This is included by the person nominated by the Accounting Officer to allocate Reference numbers as mentioned in 1.1 above.

### **Example of Procurement (and Disposal) Reference Numbering**

To assist in the provision of Procurement Reference Numbers the grid shown below indicates the format of the complete Reference Number. This Grid appears on all draft forms as a prompt for the Reference Number to be included. The grid for Disposal Reference Numbers is similar and constructed in the same manner.

<b>PD Entity name and Code</b>	<b>Wrks/Srvc/Su pplies</b>	<b>Budget Year</b>	<b>Sequence Number</b>
(a)	(b)	(c)	(d)

#### **For Example;**

**Procurement Reference Number for Works; Ntun546/wrks/06-07/00001**

**Procurement Reference Number for Services; Ntun546/srvc/06-07/00001**

**Procurement Reference Number for Supplies; Ntun546/supls/06-07/00001**

#### **4. Disposal Reference Numbers for disposal transactions**

1.7. In accordance with Regulation 122, the same format described above shall be used for disposals, however the basic Disposal Reference Number shall consist of three parts:

- (a) An abbreviation of the District/Municipality name comprising the 1<sup>st</sup> four letters and a predetermined code for the Procuring and Disposing Entity which refers to the District/Municipality code.
- (b) An abbreviation of up to 5 letters, identifying the requirement as the procurement of Works, Services or Supplies i.e. **Wrks, Srvc, Supls** respectively. This is included by the initiator of the requirement.
- (c) An indication of the Budget Year, e.g. 06/07;
- (d) A five-digit number allocated sequentially from 00001 onwards.

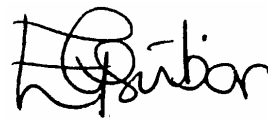
**District/ Municipality Codes for Procurement and Disposal Reference Numbers**

<b>District Abbrev.</b>	<b>District Code</b>	<b>District</b>
Adju	504	Adjumani
Apac	502	Apac
Arua	503	Arua
Bugi	504	Bugiri
Bund	505	Bundibujjo
Bush	506	Bushenyi
Busi	507	Busia
Gulu	508	Gulu
Hoim	509	Hoima
Igan	510	Iganga
Jinj	511	Jinja
Kaba	512	Kabale
Kabr	513	Kabarole
Kabe	514	Kaberamaido
Kala	515	Kalangala
Kamp	516	Kampala
Kamu	517	Kamuli
Kamw	518	Kamwenge
Kanu	519	Kanungu
Kapc	520	Kapchorwa
Kase	521	Kasese
Kata	522	Katakwi
Kayu	523	Kayunga
Kiba	524	Kibale
Kibo	525	Kiboga
Kiso	526	Kisoro
Kitg	527	Kitgum
Koti	528	Kotido
Kumi	529	Kumi
Kyen	530	Kyenjojo
Lira	531	Lira
Luwe	532	Luwero
Masa	533	Masaka
Masi	534	Masindi
Mayu	535	Mayuge
Mbal	536	Mbale
Mbar	537	Mbarara
Moro	538	Moroto
Moyo	539	Moyo
Mpig	540	Mpigi
Mube	541	Mubende
Muko	542	Mukono
Nakp	543	Nakapiripirit
Naks	544	Nakasongola
Nebb	545	Nebbi
Ntun	546	Ntungamo

<b>District Abbrev.</b>	<b>District Code</b>	<b>District</b>
Pade	547	Pader
Pali	548	Paliisa
Raka	549	Rakai
Ruku	550	Rukungiri
Semb	551	Sembabule
Siro	552	Sironko
Soro	553	Soroti
Toro	554	Tororo
Waki	555	Wakiso
Yumb	556	Yumbe
Buta	557	Butaleja
Iban	558	Ibanda
Kaab	559	Kaabong
Isin	560	Isingiro
Kali	561	Kaliro
Kiru	562	Kiruhura
Kobo	563	Koboko
Amol	564	Amolatar
Amun	565	Amunia
Mana	566	Manafa
Bukw	567	Bukwo
Mity	568	Mityana
Naks	569	Nakaseke
Doko	575	Dokolo
Abim	573	Abim
Mara	577	Marach
Oyam	572	Oyam
Amur	570	Amuru
Budu	579	Bududa
Buda	571	Budaka
Buke	578	Bukedea
Buli	576	Buliisa
Namu	574	Namutumba
Lyan	580	Lyantonde
Naka	569	Nakaseke

<b>Municipality Abbrev.</b>	<b>Municipality Code</b>	<b>Municipality name</b>
Arua	751	Arua
Ente	752	Entebbe
Fort	753	Fort Portal
Gulu	754	Gulu
Jinj	755	Jinja
Kaba	757	Kabale
Lira	758	Lira
Masa	759	Masaka
Mbal	760	Mbale
Mbar	761	Mbarara
Moro	762	Moroto
Soro	763	Soroti
Toro	764	Tororo
		<b>Exclusion from this list does not imply that the Local Government Act does not apply to an entity.</b>

**Signed:**

**Chairman of the Board of Directors**

**Executive Director of the Authority**

**Public Procurement and Disposal of Public Assets Authority**

**Local Governments  
(Public Procurement and Disposal of Public Assets)  
Guidelines, 2008**

**Details covered in this Guideline:**

<b>Guideline Subject:</b>	<b>Guidance on Bid and Performance Securities</b>
<b>Guideline Reference:</b>	<b>4/2008</b>
<b>Guideline Issue Date:</b>	<b>25<sup>th</sup> January, 2008</b>

## **Guideline Subject: Guidance on Bid and Performance Securities**

In accordance with **Regulations 50 (2) and 102(3)** of the Local Governments (Public Procurement and Disposal of Public Assets) Regulations 2006, the following guidance is provided in respect of Bid and Performance Securities.

### **Bid Security**

It is the policy of the Government of Uganda that, where it is determined that a Bid Security shall be required, the value of the Security shall be a fixed amount not a percentage of the Bid price. The amount of the Bid Security shall be determined by the Procuring and Disposing Entity between 1% and 2% of the estimate bid value.

Example:	Expected Bid value	Ug.shs 30,000,000
	1% equals	Ug.shs 300,000
	2% equals	Ug. Shs 600,000

Decision made to request a Bid Security amount of Ug.shs 450,000.

### **Performance Security**

There is no requirement for the Performance Security to be expressed as an absolute value. It is permissible to express the amount for a Performance Security as a percentage of the bid value.

The amount of the Performance Security shall be determined by the Procuring and Disposing Entity between 5% and 10% of the expected contract value.

**Signed:**



**Chairman of the Board of Directors**



**Executive Director of the Authority**

**Public Procurement and Disposal of Public Assets Authority**



**Local Governments  
(Public Procurement and Disposal of Public Assets)  
Guidelines, 2008**

**Details covered in this Guideline:**

**Guideline Subject:** Administrative Review Fee  
**Guideline Reference:** No. 5/2008  
**Guideline Issue Date:** 25<sup>th</sup> January, 2008

## **Guideline Subject: Administrative Review Fee**

In accordance with **Regulation 138 (3)** of the Local Governments (Public Procurement and Disposal of Public Asset) Regulations 2006, the following fees shall be charged for all applications for administrative review.

### **1. Institutional arrangements**

Administrative Review applications are submitted to Accounting Officers in the first instance. Accounting Officers are required to ensure that there are adequate facilities to ensure the immediate receipt of fees accompanying Administrative Review requests.

### **2. Administrative Review Fees**

The fee to be paid shall be as follows:

#### **Works:**

- (a) **Open Bidding:** The Administrative Review Fee shall be 50 Currency Points. Under the Sixth Schedule of the Local Governments Act, Cap 243, one currency point is equivalent to Ug. Shs. 20,000. Accordingly 50 currency points is equivalent to Ug Shs. 1,000,000
- (b) **Selective Bidding:** The Administrative Review Fee shall be 30 Currency Points. 30 currency points is equivalent to Ug.shs. 600,000

#### **Supplies and Services:**

- (c) **Open Bidding:** The Administrative Review Fee shall be 25 Currency Points. 25 currency points is equivalent to Ug Shs. 500,000.
- (d) **Selective Bidding:** The Administrative Review Fee shall be 15 Currency Points. 15 currency points is equivalent to Ug Shs. 300,000.

### **3. Reimbursement of Administrative Review Fee**

Accounting Officers shall refund the Administrative Review Fee to a bidder whose application is upheld on completion of the Administrative Review process.

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Signed:



**Chairman of the Board of Directors**

**Executive Director of the Authority**

**Public Procurement and Disposal of Public Assets Authority**

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**Local Governments  
(Public Procurement and Disposal of Public Assets)  
Guidelines, 2008**

**Details covered in this Guideline:**

<b>Guideline Subject:</b>	<b>Format for Local Governments Procurement and Disposal Quarterly Reports. (No. 6/2006)</b>
<b>Guideline Reference:</b>	<b>No. 6/2008</b>
<b>Guideline Issue Date:</b>	<b>25<sup>th</sup> January, 2008</b>

<b>PDE ENTITY NAME AND CODE:</b>				<b>Report for Quarter:</b> <i>(Indicate months and year).</i>			
<b>QUARTERLY REPORT ON PROCUREMENT<sup>1</sup> (except Micro Procurements)</b>							
<b>SOURCE OF FUNDING:</b>							
<b>Procurement/ Disposal Reference No</b>	<b>Subject of Procurement/ Disposal</b>	<b>Method of Procurement/ Disposal</b>	<b>Provider/ Purchaser</b>	<b>Date of Award</b>	<b>Contract Value (In Uganda Shillings)</b>	<b>Estimated Contract Value(Ug.shs)</b>	<b>Procurement Status</b>

This Report was prepared by: Name: \_\_\_\_\_ Position: \_\_\_\_\_ Signature: \_\_\_\_\_

I hereby certify that the above is a true and accurate record of the procurement transactions for this Procuring and Disposing Entity.

Name: \_\_\_\_\_ Signature: \_\_\_\_\_ Position: \_\_\_\_\_ Date: \_\_\_\_\_

<sup>1</sup> Quarterly Reports are to be submitted by the 15<sup>th</sup> of the month that immediately follows the quarter to be reported on. Reports shall be submitted for each of the 4 quarters of a financial year i.e. July to September, October to December, January to March and April to June.

2.The Status column should indicate whether the procurement/disposal contract has been placed, amended, varied, completed or cancelled during the quarter

3.This report shall have an accompanying cover letter duly signed by the Accounting Officer.

PDE ENTITY NAME AND CODE:				Report for Quarter: <i>(Indicate months and year).</i>			
QUARTERLY REPORT ON DISPOSAL							
Disposal Reference No	Subject of Disposal	Method of Disposal	Purchaser	Date of Award	Reserve Price	Contract Value (In Uganda Shillings)	Estimated Contract Value(Ug.shs)

This Report was prepared by: \_\_\_\_\_

I hereby certify that the above is a true and accurate record of the procurement transactions for this Procuring and Disposing Entity.

Name: \_\_\_\_\_ Signature: \_\_\_\_\_ Position: \_\_\_\_\_ Date: \_\_\_\_\_

PDE ENTITY NAME AND CODE			Report for Quarter(indicate months and year)		
Quarterly Report on Procurements( Micro Procurements and Community Purchase)					
Procurement/ Reference No	Subject of Procurement	Method of Procurement	Provider/ Purchaser	Invoice No. and Date	Total (Ug.shs.)

I hereby certify that the above is a true and accurate record of the micro procurement transaction under my delegated authority

Signature: \_\_\_\_\_ Name: \_\_\_\_\_

Position: \_\_\_\_\_ Date: \_\_\_\_\_

1. Entity should ensure aggregation of procurements when reporting micro and community purchase procurements e.g. food items.
2. This is a Report for submission to the Contracts Committee

Signed:  

**Chairman of the Board of Directors      Executive Director of the Authority**  
**Public Procurement and Disposal of Public Assets Authority**

**Local Governments  
(Public Procurement and Disposal of Public Assets)  
Guidelines, 2008**

**Details covered in this Guideline:**

**Guideline Subject:**           **Procedures for Evaluation Methods**

**Guideline Reference:**       **No. 7/2008**

**Guideline Issue Date:**     **25<sup>th</sup> January, 2008**



## **Guideline Subject: Application of Evaluation Methods**

In accordance with **Regulation 79 (1)** of the Local Governments (Public Procurement and Disposal of Public Assets) Regulations 2006, the following guidance is provided on procedures to be followed by Local Governments in the application of Evaluation methods.

Evaluation is the process by which the best evaluated bidder is selected for award from among all the bids received.

The evaluation shall be conducted by an **Evaluation Committee**.

All evaluations consist of **three** stages:

1. **Preliminary Examination**; this is a brief assessment of whether each bidder is eligible and administratively compliant to the basic instructions and requirements of the solicitation document. Eligibility and compliance shall be determined on a pass or fail basis and a bid which is not eligible or substantially compliant shall be rejected. At this stage, unsuitable bidders such as those who are not registered companies or do not avail bid security where necessary are eliminated.
2. **Technical (Detailed) Evaluation**; this is conducted only on a bid that is determined to be eligible and compliant during the preliminary examination. This stage determines whether bids are substantially responsive to the commercial and technical requirements of the solicitation documents using a pass or fail system or a merit point system e.g. assessing technical quality of the bid by comparing it with the specifications in the solicitation document.
3. **Financial Comparison**; this shall be conducted to examine and compare financial bids and determine the best evaluated bid price. The solicitation document shall state which costs shall be taken into account in the financial comparison and which costs shall be excluded.

### **A) Evaluation Procedure:**

- Membership of the Evaluation Committee shall be recommended by the Procurement and Disposal Unit and approved by the Contracts Committee using LG PP Form 11. The number of members of the Evaluation Committee shall depend on the value and complexity of the procurement requirement but shall in all cases be a minimum of three (3).
- A member of the Contracts Committee shall not be a member of the Evaluation Committee.
- A member of the Procurement and Disposal Unit or a User department may be a member of an Evaluation Committee, where he or she has appropriate skills or experience.

- The Evaluation Committee shall report to the Contracts Committee through the Procurement and Disposal Unit.

**B) Evaluation Methods:**

The evaluation methodology should be stated in the bid document. The Evaluation Committee shall use one of the following evaluation methods in accordance with **Regulation 79(1)**:

**1. Quality and Cost Based Selection (QCBS):**

- This method shall be used for the evaluation of consultancy services where the terms of reference are well defined.
- This method may also be used for evaluation of works
- This method considers both the technical quality and the cost of each bid.
- The bid submission method shall be the one-stage two envelope method
- Technical bids are evaluated first without access to financial bids.
- The relative weighting of technical and cost elements are decided in advance and are stated in the bid document. The relative weights to be given to the technical and financial components of the evaluation are chosen taking into account the nature of the assignment, the complexity and the relative importance of the technical aspect of the bid.
- A preliminary examination shall be conducted to determine whether a bidder is eligible and administratively compliant on a pass/fail basis.
- A technical (detailed) evaluation shall be conducted on only a bid which is determined to be eligible and compliant. A detailed merit point evaluation of each bid shall initially be conducted by each member of the committee and the members shall collect and compare the scores of each evaluator.
- The scores of each evaluator shall be totalled and divided by the number of evaluators to obtain an average score by the evaluation committee for each bid. The average score shall be the total technical score for the bid.
- The total technical score of each bid shall be compared to the minimum qualifying technical mark stated in the solicitation document; a bid which is less than the minimum qualifying mark shall be rejected and eliminated from further evaluation.
- The evaluation committee shall prepare a technical evaluation report which shall be approved by the Contracts Committee prior to opening of the financial bid.
- A bidder who has reached the minimum qualifying technical mark shall be notified of the date and time set for the opening of financial bids. The opening dated shall not be sooner than two weeks after the notification date.

- The bid with the highest technical score shall be given a financial score of 100; other bids shall be given a financial score that is inversely proportional to the lowest evaluated price.
- The evaluation committee shall prepare a financial evaluation report which shall be approved by the Contracts Committee.
- The total score is obtained by adding the weighted technical and financial scores together.
- A bidder obtaining the highest total score shall be recommended to the Contracts Committee for award of contract subject to any post-qualification or negotiations that may be required.

**2. Quality Based Selection (QBS):**

- This method may be used for the evaluation of consultancy services
- This evaluation method focuses on quality as the primary factor.
- The bid submission method shall be the one stage- two envelope method
- The technical bid is evaluated without access to a financial bid.
- The solicitation document shall state the technical evaluation criteria and their maximum scores
- A preliminary examination shall be conducted to determine whether a bidder is eligible and administratively compliant. This shall be conducted on a pass/fail basis.
- A detailed evaluation shall be conducted on only a bid which is determined to be eligible and compliant. A detailed merit point evaluation of each bid shall initially be conducted by each member of the committee and the members shall collect and compare the scores of each evaluator.
- The scores of each evaluator shall be totalled and divided by the number of evaluators to obtain an average score by the evaluation committee for each bid. The average score shall be the total technical score for the bid.
- The total technical score of each bid shall be compared to the minimum qualifying technical mark stated in the solicitation document; a bid which is less than the minimum qualifying mark shall be rejected and eliminated from further evaluation.
- The evaluation committee shall prepare a technical evaluation report using LG PP Form 12 which shall include a recommendation to open the financial bid of the bidder who obtained the highest technical score.
- The technical evaluation report shall be approved by the Contracts Committee prior to opening of the financial bid.

- Financial comparison is undertaken only for the best technical bid.
- The bid with the highest technical score shall be the best evaluated bid and shall be recommended for award of contract, subject to negotiation by the procuring and disposing entity.

### **3. Fixed Budget Selection:**

- This method may be used for the evaluation of consultancy services
- This method recommends the bidder with the best technical bid which is within the procuring and disposing entity's budget.
- The bid submission method shall be the one stage- two envelope method.
- The technical bid is evaluated without access to the financial bids.
- The solicitation document shall state the technical evaluation criteria and the maximum score, the minimum qualifying mark below which a bid is rejected and the available budget
- For this method the procuring and disposing entity the Statement of Requirements shall be well prepared to make sure that the budget is sufficient for a bidder to perform the expected tasks
- A preliminary examination shall be conducted to determine whether a bidder is eligible and administratively compliant. This shall be conducted on a pass/fail basis.
- A technical (detailed) evaluation shall be conducted on only a bid which is determined to be eligible and compliant. A detailed merit point evaluation of each bid shall initially be conducted by each member of the committee and the members shall collect and compare the scores of each evaluator
- The scores of each evaluator shall be totalled and divided by the number of evaluators to obtain an average score by the evaluation committee for each bid. The average score shall be the total technical score for the bid.
- The total technical score of each bid shall be compared to the minimum qualifying technical mark stated in the solicitation document; a bid which is less than the minimum qualifying mark shall be rejected and eliminated from further evaluation.
- The evaluation committee shall prepare a technical evaluation report using PP Form which shall include a recommendation to open the financial bid of those bidders who reached the minimum qualifying technical score.
- The technical evaluation report shall be approved by the Contracts Committee prior to opening of the financial bid.
- Bidders who have reached the minimum qualifying technical mark shall be notified of the date and time set for the opening of financial bids.

- A financial comparison shall be conducted and a bid which exceeds the budget indicated in the solicitation document shall be rejected. A bid which is within the budget shall be ranked according to its technical score, and the bidder who has submitted the highest ranked technical bid of those within the budget shall be recommended for award of contract.

#### 4. **Least Cost Selection:**

- This method may be used for consultancy services
- This method recommends the lowest priced bid which meets all the requirements of the procuring and disposing entity.
- The bid submission method shall be the one stage- two envelope method
- The technical bid is evaluated without access to the financial bids
- The solicitation document shall state the technical evaluation criteria and the maximum scores, the minimum qualifying mark below which a bid is rejected and the available budget
- A preliminary examination shall be conducted to determine whether a bidder is eligible and administratively compliant. This shall be conducted on a pass/fail basis. A bid which is not eligible or non compliant shall be rejected and eliminated from further evaluation
- A technical (detailed) evaluation shall be conducted on only a bid which is determined to be eligible and compliant. A detailed merit point evaluation of each bid shall initially be conducted by each member of the committee and the members shall collect and compare the scores of each evaluator.
- The scores of each evaluator shall be totalled and divided by the number of evaluators to obtain an average score by the evaluation committee for each bid. The average score shall be the total technical score for the bid.
- The total technical score of each bid shall be compared to the minimum qualifying technical mark stated in the solicitation document; a bid which is less than the minimum qualifying mark shall be rejected and eliminated from further evaluation
- The evaluation committee shall prepare a technical evaluation report using LG PP Form 12 which shall include a recommendation to open the financial bid of those bidders who reached the minimum qualifying technical score.
- Bidders who have reached the minimum qualifying technical mark shall be notified of the date and time set for the opening of financial bids.
- The technical evaluation report shall be approved by the Contracts Committee prior to opening of the financial bid.

- A financial comparison shall be conducted and a bid shall be ranked according to their total bid price. A bidder who has submitted the lowest priced bid which meets the minimum qualifying technical mark shall be recommended for award.
- The evaluation committee shall prepare a financial evaluation report with a recommendation to award the contract to the bidder with the lowest priced bid which is substantially responsive to the commercial and technical requirements of the procuring and disposing entity.

##### **5. Technical Compliance Selection:**

- This method shall be used for the evaluation of supplies, works and non-consultancy services.
- This is the method that recommends the lowest priced bid which is substantially responsive to the commercial and technical requirements of the procuring and disposing entity.
- The bid submission method shall be the one stage-single envelope method
- The bids are first subjected to a preliminary examination, then Technical evaluation and finally financial evaluation.
- A preliminary examination shall be conducted to determine whether a bidder is eligible and administratively compliant. This shall be conducted on a pass/fail basis only. A bid which is not eligible or non compliant shall be rejected and eliminated from further evaluation.
- A technical (detailed) evaluation shall be conducted on only a bid which is determined to be eligible and compliant. The detailed evaluation shall be conducted on a pass or fail basis; a non responsive bid shall be rejected and eliminated from further evaluation.
- A financial comparison shall be conducted only on a bid which is determined to be responsive during detailed evaluation and a bid shall be ranked according to its total bid price. A bidder who has submitted the lowest priced bid which is qualified, compliant and responsive shall be recommended for award of contract.
- The evaluation committee shall prepare an evaluation report using PP Form with a recommendation to award the contract to the bidder with the lowest bid price which is qualified, responsive and technically compliant.
- The Evaluation Report must be signed by all members of the evaluation committee and then forwarded to the Contracts Committee for approval.

##### **Post- Qualification**

A post-qualification exercise may be undertaken to determine whether the best evaluated bidder has the capability and capacity (resources) to effectively carry out the contract. The criteria for post-qualification should be limited to what is considered to

be necessary for performance of the intended contract and should be unduly restrictive.

**Summary:**

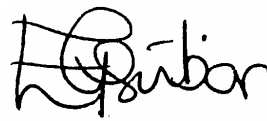
The final **Evaluation Report** shall contain recommendations on:

- The best-evaluated bidder and their evaluated price;
- Whether the best evaluated bidder is subject to post-qualification;
- Whether negotiations should be held with the best evaluated bidder.

Signed:



**Chairman of the Board of Directors**



**Executive Director of the Authority**

**Public Procurement and Disposal of Public Assets Authority**

**Local Governments  
(Public Procurement and Disposal of Public Assets)  
Guidelines, 2008**

**Details covered in this Guideline:**

<b>Guideline Subject:</b>	<b>Procedural Forms for Procurement and Disposal Transactions</b>
<b>Guideline Reference:</b>	<b>No. 8/2008</b>
<b>Guideline Issue Date:</b>	<b>25<sup>th</sup> January, 2008</b>



**Guideline Subject: Procedural Forms for Procurement and Disposal Transactions**

**LIST OF PROCEDURAL FORMS**

**PART A: PROCUREMENT PROCEDURAL FORMS**

<b>Form Number</b>	<b>Name of Form</b>	<b>Regulation Reference</b>
LG PP Form 1	Procurement Requisition	Regulation 65 (1)
LG PP Form 2	Submission to Contracts Committee for Approval of Procurement Method	Regulation 17 (2) (a)(i)
LG PP Form 3	Submission to Contracts Committee for Approval of Pre-Qualification Document and Notice	Regulation 17(1) (c) Regulation 34 (3)
LG PP Form 4	Pre-Qualification Evaluation Report	Regulation 34
LG PP Form 5	Submission to Contracts Committee for Approval of Bidding Document and Bid Notice/ Shortlist	Regulation 17 (1) (c)
LG PP Form 6	Record of Issue of Bid Documents (Non-Fee/ Fee Payable)	Regulation 66 (4)
LG PP Form 7	Submission to Contracts Committee for Approval of Addendum to Bidding Document	Regulation 67 (8)
LG PP Form 8	Record of Minutes of Pre-Bid Meeting	Regulation 68 (6)
LG PP Form 9	Record of Receipt of Bids	Regulation 70 (5)
LG PP Form 10	Record of Bid Opening	Regulation 71 (11), (12), (13)
LG PP Form 11	Membership of Evaluation Committee/ Negotiation Team	Regulation 72 (2)
LG PP Form 12	Evaluation Report	Regulation 81
LG PP Form 13	Submission to Contracts Committee for Approval of Evaluation Report and Recommendations	Regulation 81 (1)
LG PP Form 14	Negotiations Plan	Regulation 12 (1)
LG PP Form 15	Record of Negotiations	Regulation 83 (9)
LG PP Form 16	Post-Qualification Evaluation Report	Regulation 82 (5)
LG PP Form 17	Submission of Contracts Committee for Approval of Contract Award Recommendation	Regulation 84 (1)

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LG PP Form 18	Submission to Contracts Committee for Approval of Contract Document	Regulation 86 (2)
LG PP Form 19	Submission to Contracts Committee for Approval of Contract Amendment	Regulation 120 (2)
LG PP Form 20	Contracts Committee Decision on a Submission	Regulation 18 (3)

**PART B: DISPOSAL PROCEDURAL FORMS:**

<b>Form Number</b>	<b>Name of Form</b>	<b>Regulation Reference</b>
LG DPA Form 1	Disposal Requisition	Regulation 122(10)
LG DPA Form 2	Submission to Contracts Committee for approval of Disposal method	Regulation 122(5) (n), (15)
LG DPA Form 3	Submission to Contracts Committee for approval of Bidding Document and Notice	Regulation 122(5) (n), (15)
LG DPA Form 4	Record of Issue of Solicitation Documents/ Addenda (Fee/ No-Fee Payable)	Regulation 66 (4)
LG DPA Form 5	Record of Bid Closing	Regulation 70
LG DPA Form 6	Record of Bid Opening	Regulation 71
LG DPA Form 7	Membership of Evaluation Committee/ Negotiation Team	Regulation 134(7)
LG DPA Form 8	Evaluation Report (Price only)	Regulation 131(1) (2)
LG DPA Form 9	Evaluation Report (Price and other factors)	Regulation 131(1)
LG DPA Form 10	Submission to Contracts Committee for approval of Evaluation Report	Regulation 133(21)
LG DPA Form 11	Negotiations Plan	Regulation 134(5)
LG DPA Form 12	Record of minutes of Negotiations	Regulation 134(9)
LG DPA Form 13	Submission to Contracts Committee for approval of Contract award and Document	Regulation 135 (1)
LG DPA Form 14	Record of Public Auction	Regulation 133(21)
LG DPA Form 15	Agreement for transfer of Asset to another Procuring and Disposing Entity	Regulation 129(2) & (3)
LG DPA Form 16	Receipt of Payment for Asset	Regulation 124(16)

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Guidelines, 2008**

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LG DPA Form 17	Handover Certificate	Regulation 132(6)
LG DPA Form 18	Certificate of Conversion	Regulation 130(4)
LG DPA Form 19	Certificate of Destruction	Regulation 131(5)
LG DPA Form 20	Contracts Committee Decision on a Submission	Regulation 18(3)

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# **PROCUREMENT FORMS**

**PROCUREMENT REQUISITION**

PD Entity Name and Code	Wrks/Srvcs/Supplies?	Budget Year	Sequence Number

<b>Subject of Procurement:</b>	
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<b>Location for Delivery:</b>		<b>Date Required:</b>	
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Item No.	Description <i>(A detailed list, Statement of Requirements or Stock Management Information may be attached)</i>	Quantity	Unit of Measure	Estimated Unit Cost	Estimated Total Cost

<b>Funds Availability:</b>	<b>Vote/Head No.</b>	<b>Programme</b>	<b>Sub-programme</b>	<b>Item</b>	<b>Balance Remaining</b>	<b>Currency: _____</b> <b>Estimated Total Cost:</b>

Signatures are required below to certify that (1) the works, services or supplies described above are required and that the Statement of Requirements is accurate, (2) approval is granted to proceed with the procurement and that (3) funds are available or budgeted for the requirement.

**(1) Confirmation of Need**  
(Originating Officer)

**(2) Approval to Procure**  
(Authorising Officer)

**(3) Confirmation of Funding**  
(Accounting Officer unless delegated)

Signature:	_____	_____	_____
Name:	_____	_____	_____
Position:	_____	_____	_____
Date:	_____	_____	_____

**SUBMISSION TO CONTRACTS COMMITTEE: .....**

**REQUEST FOR APPROVAL OF PROCUREMENT METHOD**

PD Entity Name and Code	Wrks/Srvcs/Supplies?	Budget Year	Sequence Number

Subject of Procurement:	
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<b>SUBMISSION INFORMATION</b>		
1	Estimated value (currency and amount) Methodology for estimate	
2	State Procurement method and reason for selection	
3	Source(s) of funding	
4	Subject to the Public Procurement and Disposal of Public Assets Act? (Yes/No) If no, state applicable agreement and procedures	
5	International or Domestic Bidding? State reason	
6	Pre-qualification necessary? (Yes/No) State reason	
7	Use of any Third Party Procurement Provider? (Yes/No) If yes, give details (name, precise role, contract arrangements, costs)	
8	Subject to common procurement? (Yes/No) If yes, give details	
9	Any other relevant information	

**Documents Attached:** *(list any other documents attached)*

- PP Form 1: Procurement Requisition

The information contained in this form and the attached documents is complete, true and accurate and in accordance with the Local Government (Public Procurement and Disposal of Public Assets) Regulations, 2006:

Signature: \_\_\_\_\_ Name: \_\_\_\_\_

Position: \_\_\_\_\_ Date: \_\_\_\_\_

*Responsible Officer*

*(DD/MM/YY)*

**SUBMISSION TO CONTRACTS COMMITTEE:**

**REQUEST FOR APPROVAL OF PRE-QUALIFICATION DOCUMENT AND NOTICE**

PD Entity Code	Wrks/Srvcs/Supplies?	Budget Year	Sequence Number

Subject of Procurement:		International / Domestic
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SUBMISSION INFORMATION		
B1	Identify all officers (or providers) involved in preparation of pre-qualification document (Names and Positions)	
B2	Proposed publications for pre-qualification notice	
B3	Proposed date of publication of pre-qualification notice	
B4	Proposed date of release of pre-qualification document	
B5	Any other relevant information	

**Documents Attached:** *(list any other documents attached)*

1. Draft Invitation to Pre-qualify Notice
2. Draft Pre-qualification Document
3. LG Form 6: Proposed Evaluation Committee

<b>Previous Submission:</b> <i>(Section letter and title)</i>		<b>Date Approved:</b>	
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The information contained in this form and the attached documents is complete, true and accurate and in accordance with Local Government (Public Procurement and Disposal of Public Assets) Regulations, 2006:

Signature: \_\_\_\_\_ Name: \_\_\_\_\_

Position: \_\_\_\_\_ Date: \_\_\_\_\_

*Responsible Officer*

*(DD/MM/YY)*



PRE-QUALIFICATION EVALUATION REPORT

PD Entity Name and Code	Wrks/Srvcs/Supplies?	Budget Year	Sequence Number

Introduction

{For pre-qualification for single requirements}

The requirement is for [subject of procurement].

The Procurement method used and approved by the Contracts Committee was [Open Domestic Bidding/Open International Bidding] with pre-qualification.

{For pre-qualification for a group of contracts}

The pre-qualification is for a group of contracts for [subject of procurement]. The anticipated number and value of contracts is [insert estimated number and value].

Details of Invitation

The Pre-qualification Document was approved by the Contracts Committee on [date]. The Pre-qualification Notice was advertised on the [date] in [name of publications]. The list of Companies requesting the Pre-qualification Document was recorded using PP Form 31: Record of Issue of Solicitation Documents (No Fee Payable), which is attached as an annex.

Details of Bid Closing

Bidding was closed on [date] at [time] at [location]. The receipt of pre-qualification submissions was recorded using PP Form 34: Receipt of Bids, which is attached as an annex. Sealed pre-qualification submissions were required and received.

Details of Bid Opening

A Public Bid Opening was held at [location] on [date] at [time]. The Bid Opening and attendance was recorded using PP Form 35, which is attached as an annex.

Details of Evaluation Committee

An evaluation committee was nominated comprising the following officials and approved by the Contracts Committee on [date]:

- [Name] [Position and Department] (Chairperson Evaluation Committee)
- [Name] [Position and Department]
- [Name] [Position and Department]
- [Name] [Position and Department]

Details of Evaluation

All pre-qualification submissions received were evaluated against the criteria stated in the pre-qualification document/notice.

[Brief narrative on the result of the evaluation and detailed justification with reasons why any pre-qualification submissions were declared non responsive.]

On the basis of the pre-qualification criteria stated, [number] providers are pre-qualified and [number] are not pre-qualified.

See the attached table, which summarises the evaluation.

PRE-QUALIFICATION EVALUATION REPORT

PD Entity Name and Code	Wrks/Srvcs/Supplies?	Budget Year	Sequence Number

Recommendation

{For pre-qualification for single requirements}

It is recommended that [number] providers be invited to bid, as listed in the attached PP Form 32: Shortlist of Bidders.

{For pre-qualification for a group of contracts}

It is recommended that [number] providers be retained on file as pre-qualified and used on future shortlists for [subject of procurement].

Disagreement by the Evaluation Committee {delete if not applicable}

The evaluation committee could not reach a unanimous decision on the pre-qualification and this report details the view of the majority of the team.

[Give details of the issues where the team disagreed, the discussions held, the alternative views and the names of those with alternative views].

Signed by the Evaluation Committee:

I confirm that this Pre-qualification Report gives a complete and accurate report of the pre-qualification conducted:

Name: \_\_\_\_\_ Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Name: \_\_\_\_\_ Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Name: \_\_\_\_\_ Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Annexes: {amend as appropriate}

PP Form 31: Record of Issue of Solicitation Documents or Addenda (Fee/ No Fee Payable)

PP Form 34: Record of Receipt of Bids

PP Form 35: Record of Bid Opening

Summary of Pre-qualification Evaluation

LG Form 5: Shortlist of Bidders

Documents available from the Procurement and Disposal Unit: {amend as appropriate}

Copy of the pre-qualification document.

Copy of the pre-qualification notice

Copy of all pre-qualification submissions.

**SUMMARY OF PRE-QUALIFICATION EVALUATION**

PD Entity Code	Wrks/Srvcs/Supplies?	Budget Year	Sequence Number

Subject of Procurement: \_\_\_\_\_

	1	2	3	4	5	6	7	8
<b>Company Name</b>								
<b>Pre-qualification Criteria</b>								
<i>{List all criteria in accordance with the pre-qualification document or notice. Criteria shown are examples only}.</i>								
Experience/performance on similar contracts in the country/region/internationally	Q/NQ	Q/NQ	Q/NQ	Q/NQ	Q/NQ	Q/NQ	Q/NQ	Q/NQ
Equipment and manufacturing/construction facilities	Q/NQ	Q/NQ	Q/NQ	Q/NQ	Q/NQ	Q/NQ	Q/NQ	Q/NQ
Qualifications and experience of personnel	Q/NQ	Q/NQ	Q/NQ	Q/NQ	Q/NQ	Q/NQ	Q/NQ	Q/NQ
Financial capability to perform the contract	Q/NQ	Q/NQ	Q/NQ	Q/NQ	Q/NQ	Q/NQ	Q/NQ	Q/NQ
Local facilities or representation	Q/NQ	Q/NQ	Q/NQ	Q/NQ	Q/NQ	Q/NQ	Q/NQ	Q/NQ
Available capacity	Q/NQ	Q/NQ	Q/NQ	Q/NQ	Q/NQ	Q/NQ	Q/NQ	Q/NQ
Litigation record	Q/NQ	Q/NQ	Q/NQ	Q/NQ	Q/NQ	Q/NQ	Q/NQ	Q/NQ
<b>Recommendation</b>	<b>Q/NQ</b>	<b>Q/NQ</b>	<b>Q/NQ</b>	<b>Q/NQ</b>	<b>Q/NQ</b>	<b>Q/NQ</b>	<b>Q/NQ</b>	<b>Q/NQ</b>

**KEY: Q = Qualified NQ = Not Qualified** {delete that which is not applicable in the table above}

As a result of this pre-qualification evaluation, \_\_\_\_\_ companies were declared qualified and \_\_\_\_\_ companies were declared not qualified.

Signature: \_\_\_\_\_ Name: \_\_\_\_\_ Position: \_\_\_\_\_ Date: \_\_\_\_\_  
*On behalf of the Evaluation Committee*

**SUBMISSION TO CONTRACTS COMMITTEE: .....**

**REQUEST FOR APPROVAL OF BIDDING DOCUMENT AND BID NOTICE / SHORTLIST**

PD Entity Code	Wrks/Srvcs/Supplies?	Budget Year	Sequence Number

Subject of Procurement:	
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SUBMISSION INFORMATION		
C1	Identify all officers (or providers) involved in preparation of Statement of Requirements (Names and Positions)	
C2	Identify all officers (or providers) involved in preparation of bidding document (Names and Positions)	
C3	State evaluation methodology in bidding document and reason for selection	
C4	State contract type in bidding document and reason for selection	
C5	Proposed date and publications for bid notice	
C6	If shortlist is used attach the names and addresses of potential bidders and reasons for selection. e.g. prequalified on Authority's Register of Providers, Sole Source	
C6	Proposed date of release of bidding document	
C7	Is bidding document to be sold (Yes/No) If yes, state proposed cost	
C8	Is a pre-bid meeting/ Site Survey is required? (Yes/No) If yes, give reason and details	
C9	Any other relevant information	

**Documents Attached:** (list any other documents attached or delete if not applicable)

1. LG PP Form 4 : Pre-qualification Report and LG PP Form 5: Draft Shortlist (if applicable)
2. Draft Invitation to Bid Notice (if applicable)
3. Draft Bidding Document
4. LG PP Form 6: Proposed Evaluation Committee

<b>Previous Submission:</b> (Section letter and title)		<b>Date Approved:</b>	
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The information contained in this form and the attached documents is complete, true and accurate and in accordance with the Local Government (Public Procurement and Disposal of Public Assets) Regulations, 2006:

Signature: \_\_\_\_\_ Name: \_\_\_\_\_

Position: \_\_\_\_\_ Date: \_\_\_\_\_  
*Responsible Officer* *(DD/MM/YY)*

Insert Name of Procuring and Disposing Entity

**RECORD OF ISSUE OF BID DOCUMENTS (NON-FEE/ FEE PAYABLE)**

PD Entity Name and Code	Wrks/Srvcs/Supplies?	Budget Year	Sequence Number

Subject of Procurement:	
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Date Notice Published:		Date Document Available:		Cost of Documents:	
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No	Name & Address of Potential Bidder	Request Received (date)	Fee Paid (date)	Documents Issued (date)	Signature of Officer Issuing Document

*Signed receipts from bidders or other confirmation of receipt of documents should be attached.*

I hereby certify that the above is a true and accurate record of the issue of solicitation documents:

Signature: \_\_\_\_\_ Name: \_\_\_\_\_ Position: \_\_\_\_\_ Date: \_\_\_\_\_

**SUBMISSION TO CONTRACTS COMMITTEE: .....**  
**REQUEST FOR APPROVAL OF ADDENDUM TO BIDDING DOCUMENT**

PD Entity Code	Wrks/Srvcs/Supplies?	Budget Year	Sequence Number

Subject of Procurement:		International / Domestic
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SUBMISSION INFORMATION		
C1-1	How many times (if any) has the bidding document been amended previously?	
C1-2	Describe proposed addendum to bidding document	
C1-3	Reason(s) for addendum	
C1-4	State issue date of bidding document and original bid submission date State extension proposed to deadline, if any	
C1-5	Any other relevant information	

**Documents Attached:** *(list any other documents attached)*

- Draft Addendum to Bidding Document

**Related Documents Submitted Previously:** *(available for reference from Secretary to Contracts Committee or Head of Procurement and Disposal Unit)*

- Bidding Document and all previous addenda

<b>Previous Submission:</b> <i>(Section letter and title)</i>		<b>Date Approved:</b>	
--	--	-----------------------	--

The information contained in this form and the attached documents is complete, true and accurate and in accordance with the Local Government (Public Procurement and Disposal of Public Assets) Regulations, 2006:

Signature: \_\_\_\_\_ Name: \_\_\_\_\_

Position: \_\_\_\_\_ Date: \_\_\_\_\_

*Responsible Officer*

*(DD/MM/YY)*

Insert Name of Procuring and Disposing Entity

**RECORD OF MINUTES OF PRE-BID/ SITE SURVEY MEETING**

PD Entity Name and Code	Wrks/Srvcs/Supplies?	Budget Year	Sequence Number

Subject of Procurement:	
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Location of Pre-Bid/ Site Survey Meeting:		Date and Time of Meeting:	
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**PART 1: Record of Pre-Bid Meeting/ Site Survey**

<b>QUESTIONS ASKED</b>	<b>RESPONSES GIVEN</b>

Certification of Minutes as a true record of the proceedings of the meeting:

Signature: \_\_\_\_\_ Name: \_\_\_\_\_ Position: \_\_\_\_\_ Date: \_\_\_\_\_

*Part 1: Record of Pre-Bid Meeting to be sent to all bidders who purchased or were issued with the bidding documents.*

*Insert Name of Procuring and Disposing Entity*

**RECORD OF MINUTES OF PRE-BID/ SITE SURVEY MEETING**

PD Entity Name and Code	Wrks/Srvcs/Supplies?	Budget Year	Sequence Number

**PART 2: Record of Attendance**

*To be signed by all staff and potential bidders present at Pre-Bid/ Site Survey Meeting*

No	Name	Position	Company or Department	Signature



**RECORD OF RECEIPT OF BIDS**

PD Name and Entity Code	Wrks/Srvcs/Supplies?	Budget Year	Sequence Number

Subject of Procurement:		Method of Bid Receipt: Receipt in Person / Bid Box*
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Deadline for Submission (date and time):		Location for Submission:	
--	--	--------------------------	--

No	Name of Bidder	Date of Receipt	Time of Receipt	No of Envelopes	Comments

The bids detailed above were received before the date and time of the deadline / The bid box was sealed at the date and time of the deadline (*delete as applicable*)\*. No further bids were received after the deadline.

Signature: \_\_\_\_\_ Name: \_\_\_\_\_ Position: \_\_\_\_\_ Date: \_\_\_\_\_

Signature: \_\_\_\_\_ Name: \_\_\_\_\_ Position: \_\_\_\_\_ Date: \_\_\_\_\_

*To be signed by the member of the Procurement and Disposal Unit managing the bid closing and a representative from the Contracts Committee witnessing.*

*\* Bid details do not need to be recorded when a bid box is used, but may be registered using this form prior to placement in the bid box, if appropriate.*

**RECORD OF BID OPENING**

PD Entity Name and Code	Wrks/Srvcs/Supplies?	Budget Year	Sequence Number

Subject of Procurement:	
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Location of Bid Opening:		Date and Time of Bid Opening:		Technical / Financial / Combined Opening <i>(delete as applicable)</i>
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<b>PART 1: Record of Bids Opened and Details Read Out</b> <i>(amend details recorded as appropriate)</i>						
No	Name of Bidder	Currency and Price as read out	Bid Security Received (Y/N)	Bid Security Amount	No of Copies (inc original)	Remarks

All bids received on time in response to the solicitation document were opened, read out and recorded:

Signature: \_\_\_\_\_ Name: \_\_\_\_\_ Position: \_\_\_\_\_ Date: \_\_\_\_\_

Signature: \_\_\_\_\_ Name: \_\_\_\_\_ Position: \_\_\_\_\_ Date: \_\_\_\_\_

*To be signed by the member of the Procurement and Disposal Unit managing the bid opening and a representative from the Contracts Committee witnessing.*

*Insert Name of Procuring and Disposing Entity*

## RECORD OF BID OPENING

**LG PP Form 10**

**R 71 (11),(12),  
(13)**

Page \_\_\_ of \_\_\_

PD Entity Name and Code	Wrks/Srvcs/Supplies?	Budget Year	Sequence Number

### **PART 2: Record of Attendance**

*To be signed by all staff and bidders present at Bid Opening*

<b>No</b>	<b>Name</b>	<b>Position</b>	<b>Company or Department</b>	<b>Signature</b>

Insert Name of Procuring and Disposing Entity

LG PP Form 11

**MEMBERSHIP OF EVALUATION COMMITTEE/NEGOTIATION TEAM**

R 72 (2) &

R 83 (1)

Page \_\_\_ of \_\_\_

PD Name and Entity Code	Wrks/Srvcs/Supplies?	Budget Year	Sequence Number

Subject of Procurement:		Evaluation Committee/ Negotiation Team <i>(delete as applicable)</i>
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Method of Procurement:		Estimated Value:	
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No	Name of Member	Position	Department	Reason for Selection <i>e.g. procurement knowledge, technical expertise, representative of user dept etc</i>

The evaluation committee/negotiation team was proposed by:

Signature: \_\_\_\_\_ Name: \_\_\_\_\_ Position: \_\_\_\_\_ Date: \_\_\_\_\_

R (76), R (77), R(78)

R (79), R (80), R(81)

**EVALUATION REPORT**

PD Entity Name and Code	Wrks/Srvcs/Supplies?	Budget Year	Sequence Number

**Guidance Notes for Drafting** {delete after completing Evaluation Report}

This form provides an outline format to assist evaluation committees in drafting evaluation reports for works, supplies or services, using:

- Technical Compliance selection
- Quality and Cost Based Selection
- Quality Based Selection
- Fixed Budget Selection
- Least Cost Selection

It is suitable for use under any method of procurement. The content should be amended as appropriate for evaluation of supplies or services.

Italic text in {} brackets indicates either a drafting instruction, which should be deleted from the final report or a section included for a possible option, where the whole section should be deleted if not appropriate.

Normal text in [] brackets indicates data which should be completed for each individual evaluation.

**PART 1: BACKGROUND AND TECHNICAL EVALUATION**

**Introduction:**

The requirement is for the [supply, delivery, installation and commissioning/ provision of/] of [subject of procurement].

The Procurement method used and approved by the Contracts Committee was [Open Domestic Bidding/Open International Bidding/Restricted Domestic Bidding/Restricted International Bidding/Quotations and Proposals Procurement/Direct Procurement.]

**Details of Invitation:**

*{For Open Bidding without pre-qualification}*

The Bidding Document/Request for Proposals (RFP) was approved by the Contracts Committee on [date]. The Bid Notice was advertised on the [date] in [name of publications]. The list of Bidders purchasing the Bidding Documents was recorded using LG Form 6: Record of Issue of Solicitation Documents (Fee Payable), which is attached as an annex.

*{For Open Bidding with pre-qualification}*

The Invitation to Bid/Request for Proposals (RFP), evaluation of prequalification/ Expressions of Interest and shortlist were approved by the Contracts Committee on [date]. The list of bidders who were issued with the Bidding Documents was recorded using LG Form 6: Record of Issue of Solicitation Documents or Addenda (No Fee Payable), which is attached as an annex.

*{For Restricted Bidding or Quotations and Proposals Procurement}*

The Invitation to Bid or Request for Quotations/ Proposals (RFQ/RFP) document and shortlist were approved by the Contracts Committee on [date]. The bidders who were issued with the Bidding

R (76), R (77), R(78)

R (79), R (80), R(81)

**EVALUATION REPORT**

PD Entity Name and Code	Wrks/Srvcs/Supplies?	Budget Year	Sequence Number

Documents/RFP was recorded using LG Form 6: Record of Issue of Solicitation Documents or Addenda (No Fee Payable), which is attached as an annex.

*{For Direct Procurement}*

The solicitation document and proposed bidder were approved by the Contracts Committee on [date]. The solicitation document was issued on [date].

**Addenda to Solicitation Document**

*{For addenda}*

[Number] addendum/addenda was/were approved by the Contracts Committee on [date(s)] and issued. The issue of the addendum/addenda was recorded using LG Form 6: Record of Issue of Solicitation Documents or Addenda (No Fee Payable), which is attached as an annex.

*{For no addenda}*

No addenda to the solicitation document were required or issued.

**Pre-Bid Meeting *{delete if not applicable}***

A pre-bid meeting was held at [location] on [date]. The meeting was recorded using LG Form 8: Record of Pre-Bid Meeting, which is attached as an annex.

**Details of Bid Closing:**

*{For Open Bidding, Restricted Bidding and Quotations and Proposals Procurement}*

Bidding was closed on [date] at [time] at [location]. The receipt of bids was recorded using LG Form 9: Receipt of Bids, which is attached as an annex. Sealed Bids were required and received.

*{For Direct Procurement}*

The sealed bid was received on [date].

**Details of Bid Opening:**

**a) Technical Compliance Selection:**

A Public Bid Opening was held at [location] on [date] at [time]. The Bid Opening and attendance was recorded using LG Form 10, which is attached as an annex.

**b) Quality and Cost Based Selection/ Quality Based Selection/ Fixed Budget Selection/ Least Cost Selection:**

A Public Bid Opening was held at [location] on [date] at [time]. Outer envelopes were opened and checks made to ensure that they contained two separately sealed technical and financial bids. Technical bids only were opened, stamped and signed by the Chairperson. Financial bids were not opened and were put into secure storage. The Bid Opening and attendance was recorded using LG Form 10, which is attached as an annex.

**Details of Evaluation Committee**

An evaluation committee comprising the following officials was nominated by the Procurement and Disposal Unit and approved by the Contracts Committee on [date]:

R (76), R (77), R(78)

R (79), R (80), R(81)

**EVALUATION REPORT**

PD Entity Name and Code	Wrks/Srvcs/Supplies?	Budget Year	Sequence Number

[Name] [Position and Department] (Chairperson Evaluation Committee)

[Name] [Position and Department]

[Name] [Position and Department]

**Details of evaluation method.**

The Evaluation method being used is .....which involves the following procedure:

**1. Preliminary examination** on a pass/fail basis to determine the eligibility of the bidders and assess their administrative compliance to the Invitation. Non eligible and non compliant bids were eliminated from further evaluation.

**2. Detailed Evaluation:**

- a) **Technical Compliance Selection** (*bid submission method is one stage- single envelope*): to determine the technical; and commercial responsiveness of eligible, compliant bids to the technical specification and terms and conditions in the Invitation. Bids that were not substantially responsive were eliminated from further evaluation.
- b) **Quality and Cost Based Selection** (*bid submission method is one stage-two envelope*): to determine the commercial responsiveness of bids and to assess the technical quality of bids against the criteria in the Terms of Reference in the invitation and determine their total technical score using a merit point system. Each bid was compared to the minimum technical qualifying mark stated in the invitation and those not meeting the minimum mark or that were not substantially commercial responsive were eliminated from further evaluation.
- c) **Quality Based Selection** (*bid submission method is one stage-two envelope*): to determine the commercial responsiveness of bids and to assess the technical quality of bids against the criteria in the Terms of Reference in the invitation and determine their total technical score using a merit point system. Bids that were not substantially commercial responsive were eliminated from further evaluation. Bids that were substantially responsive were ranked according to technical score.
- d) **Fixed Budget Selection** (*bid submission method is one stage-two envelope*) : to determine the commercial responsiveness of bids and to assess the technical quality of bids against the criteria in the Terms of Reference in the invitation and determine their total technical score using a merit point system. Each bid was compared to the minimum technical qualifying mark stated in the invitation and those not meeting the minimum mark or that were not substantially commercial responsive were eliminated from further evaluation.
- e) **Least Cost Selection** (*bid submission method is one stage-two envelope*): to determine the commercial responsiveness of bids and to assess the technical quality of bids against the criteria in the Terms of Reference in the invitation and determine their total technical score using a merit point system. Each bid was compared to the minimum technical qualifying mark stated in the invitation and those not meeting the minimum mark or that were not substantially commercial responsive were eliminated from further evaluation.

R (76), R (77), R(78)

R (79), R (80), R(81)

**EVALUATION REPORT**

PD Entity Name and Code	Wrks/Srvcs/Supplies?	Budget Year	Sequence Number

**3. Financial Comparison:**

- a) **Technical Compliance Selection:** to examine and rank financial bids. The lowest price eligible, compliant, substantially responsive bid was ranked first and declared the best evaluated bid.
- b) **Quality Based Selection:** The financial bid of the bidder with the highest technical mark will be opened and a financial comparison carried out to examine the financial bid. The bidder will be recommended for contract award subject to any negotiations required.
- b) **Fixed Budget Selection:** Financial bids of those bidders who were substantially responsive and met the minimum qualifying mark will be opened and a financial comparison carried out to examine financial bids and reject any bids which exceed the budget. The bidder submitting the highest ranked technical bid among those within the budget will be recommended for contract award, subject to any negotiations required.
- c) **Quality and Cost Based Selection:** Financial bids of those bidders who were substantially responsive and met the minimum qualifying mark will be opened and a financial comparison carried out to examine financial bids and determine the financial score of each bid.  
  
 Technical and financial scores will be combined, using the weightings given in the invitation, to give a total score for each bid. The bidder with the highest total score will be ranked first and recommended for contract award, subject to any negotiations required.
- d) **Least Cost Selection:** Financial bids of those bidders who were substantially responsive and met the minimum qualifying mark will be opened and a financial comparison carried out to examine financial bids and rank the bids according to price. The bidder submitting the lowest priced bid will be ranked first and recommended for contract award, subject to any negotiations required.

**1. Preliminary examination**

[Brief narrative on the result of the Preliminary examination and detailed justification with reasons why any Bids were declared non eligible or non compliant.]

See Table 1, which summarises the preliminary examination.

**2. Detailed Technical and Commercial Evaluation (of the eligible, compliant Bids)**

**a) Quality and Cost Based Selection:**

[Brief narrative on the results of the Detailed Commercial Evaluation and detailed justification with reasons why any bids were declared non responsive. Include details of any nonmaterial nonconformities, errors or omissions waived or rectified by the evaluation committee and the way in which they were quantified for inclusion in the financial comparison. Include details of all clarifications requested and received from bidders.]

[Brief narrative on the results of the Detailed Technical Evaluation, including strong and weak points of each bid and reasons for any large differences in scores between evaluators. State how many bids reached the minimum qualifying mark and how many failed to reach it.]



R (76), R (77), R(78)

R (79), R (80), R(81)

**EVALUATION REPORT**

PD Entity Name and Code	Wrks/Srvcs/Supplies?	Budget Year	Sequence Number

See Table 2 which summarises the detailed commercial evaluation. A summary of the technical scores is given in Table 3, indicating which bids reached the minimum qualifying mark. The score sheets for each bid, showing the scores given by each evaluator against each of the criterion and the average scores are also included as Table 3A and the individual evaluators’ score sheets as Table 3B.

**Recommendation** *{amend as appropriate}*

On the basis of the detailed evaluation criteria and the minimum technical qualifying mark of [minimum qualifying mark] stated in the invitation, it is recommended that the financial bids of the following [number] bidders be opened:

Bid No	Name of Bidder	Technical Score

**b) Technical Compliance Selection:**

[Brief narrative on the results of the Detailed Commercial Evaluation and detailed justification with reasons why any bids were declared non responsive. Include details of any nonmaterial nonconformities, errors or omissions waived or rectified by the evaluation committee and the way in which they were quantified for inclusion in the financial comparison. Include details of all clarifications requested and received from bidders.]

See Table 2 and 3, which summarise the detailed commercial evaluation.

**Financial Comparison (of eligible, compliant, responsive Bids)**

Describe the correction of any arithmetic errors, application of any discounts, adjustments made for any nonmaterial nonconformities, errors or omissions, conversion to a common currency and application of any margin of preference.]

All bids that were eligible, compliant and substantially responsive were ranked, with the lowest priced being ranked first.

See Table 4, which summarises the financial comparison.

**Evaluation of Multiple Lots** *{delete if not applicable}*

A second stage of the financial comparison was undertaken to apply discounts, which were conditional on the simultaneous award of more than one lot.

See the attached spreadsheet which details the application of the conditional discounts.

**Recommendations** *{amend as appropriate}*

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R (79), R (80), R(81)

**EVALUATION REPORT**

PD Entity Name and Code	Wrks/Srvcs/Supplies?	Budget Year	Sequence Number

On the basis of the evaluation methodology and criteria stated in the Invitation, it is recommended that-

- (1) the best evaluated bid for the procurement of [list all items the recommendation relates to] is from [Name of Bidder] with a total evaluated price of [currency and amount].
- (2) negotiations are/are not required.
- (3) a post-qualification is/is not required.
- (4) the total proposed contract price is [currency and amount].
- (5) the total acquisition cost for the requirement is estimated to be [currency and amount], including [state all incidental costs included in the estimate].

*{Repeat these recommendations for split awards or multiple lots}*

**c) Quality Based Selection:**

[Brief narrative on the results of the Detailed Commercial Evaluation and detailed justification with reasons why any bids were declared non responsive. Include details of any nonmaterial nonconformities, errors or omissions waived or rectified by the evaluation committee and the way in which they were quantified for inclusion in the financial comparison. Include details of all clarifications requested and received from bidders.]

[Brief narrative on the results of the Detailed Technical Evaluation, including strong and weak points of each bid and reasons for any large differences in scores between evaluators. State which bid obtained the highest technical score.]

See Table 2, which summarise the detailed commercial evaluation. A summary of the technical scores is given in Table 3, indicating which bids reached the minimum qualifying mark. The score sheets for each bid, showing the scores given by each evaluator against each of the criterion and the average scores are also included as Table 3A and the individual evaluators’ score sheets as Table 3B.

**Recommendation** *{amend as appropriate}*

On the basis of the detailed evaluation criteria stated in the invitation, it is recommended that the financial bid of [name of bidder] be opened and preparations be made for negotiations.

**d) Fixed Budget Selection:**

[Brief narrative on the results of the Detailed Commercial Evaluation and detailed justification with reasons why any bids were declared non responsive. Include details of any nonmaterial nonconformities, errors or omissions waived or rectified by the Evaluation committee and the way in which they were quantified for inclusion in the financial comparison. Include details of all clarifications requested and received from bidders.]

[Brief narrative on the results of the Detailed Technical Evaluation, including strong and weak points of each bid and reasons for any large differences in scores between evaluators. State how many bids reached the minimum qualifying mark and how many failed to reach it.]

R (76), R (77), R(78)

R (79), R (80), R(81)

**EVALUATION REPORT**

PD Entity Name and Code	Wrks/Srvcs/Supplies?	Budget Year	Sequence Number

See Table 2, which summarise the detailed commercial evaluation. A summary of the technical scores is given in Table 3, indicating which bids reached the minimum qualifying mark. The score sheets for each bid, showing the scores given by each evaluator against each of the criterion and the average scores are also included as Table 3A and the individual evaluators’ score sheets as Table 3B.

**Recommendation** *{amend as appropriate}*

On the basis of the detailed evaluation criteria and the minimum technical qualifying mark of [minimum qualifying mark] stated in the invitation, it is recommended that the financial bids of the following [number] bidders be opened:

Bid No	Name of Bidder	Technical Score

**e) Least Cost Selection:**

[Brief narrative on the results of the Detailed Commercial Evaluation and detailed justification with reasons why any bids were declared non responsive. Include details of any nonmaterial nonconformities, errors or omissions waived or rectified by the Evaluation committee and the way in which they were quantified for inclusion in the financial comparison. Include details of all clarifications requested and received from bidders.]

[Brief narrative on the results of the Detailed Technical Evaluation, including strong and weak points of each bid and reasons for any large differences in scores between evaluators. State how many bids reached the minimum qualifying mark and how many failed to reach it.]

See Table 2, which summarise the detailed commercial evaluation. A summary of the technical scores is given in Table 3, indicating which bids reached the minimum qualifying mark. The score sheets for each bid, showing the scores given by each evaluator against each of the criterion and the average scores are also included as Table 3A and the individual evaluators’ score sheets as Table 3B.

**Recommendation** *{amend as appropriate}*

On the basis of the detailed evaluation criteria and the minimum technical qualifying mark of [minimum qualifying mark] stated in the invitation, it is recommended that the financial bids of the following [number] bidders be opened:

R (76), R (77), R(78)

R (79), R (80), R(81)

**EVALUATION REPORT**

PD Entity Name and Code	Wrks/Srvcs/Supplies?	Budget Year	Sequence Number

Bid No	Name of Bidder	Technical Score

**Disagreement by the Evaluation Committee** *{delete if not applicable}*

The evaluation committee could not reach a unanimous decision on the evaluation and this evaluation report details the view of the majority of the team.

[Give details of the issues where the team disagreed, the discussions held, the alternative views and the names of those with alternative views].

**Signed by the Evaluation Committee:**

I confirm that this Evaluation Report gives a complete and accurate report of the evaluation conducted:

Name: \_\_\_\_\_ Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Name: \_\_\_\_\_ Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Name: \_\_\_\_\_ Signature: \_\_\_\_\_ Date: \_\_\_\_\_

**Annexes: {amend as appropriate}**

LG Form 6: Record of Issue of Solicitation Documents or Addenda (Fee/ No Fee Payable)

LG Form 8: Record of Pre-Bid Meeting

LG Form 9: Record of Receipt of Bids

LG Form 10: Record of Bid Opening

Table 1: Preliminary Examination and Assessment of Eligibility

Table 2: Summary of Detailed Commercial Evaluation

Table 3: Summary of Detailed Technical Evaluation

Table 3A: Detailed Technical Evaluation of Bid (one for each bidder)

Table 3B: Evaluator’s Score Sheet for Technical Evaluation (one for each evaluator)

**R (76), R (77), R(78)**

**R (79), R (80), R(81)**

**EVALUATION REPORT**

PD Entity Name and Code	Wrks/Srvcs/Supplies?	Budget Year	Sequence Number

**Documents available from the Procurement and Disposal Unit: {amend as appropriate}**

Copy of the solicitation document.

Copy of all Technical Bids.

R (76), R (77), R(78)

R (79), R (80), R(81)

**EVALUATION REPORT**

PD Entity Name and Code	Wrks/Srvcs/Supplies?	Budget Year	Sequence Number

**PART 2: FINANCIAL COMPARISON** (for evaluation of Services)

**Details of Financial Bid Opening**

A Public Bid Opening was held at [location] on [date] at [time]. Financial bids were opened, stamped and signed by the Chairperson. Prices and technical scores were read out. The Bid Opening and attendance was recorded using LG Form 10, which is attached as an annex.

**Financial comparison**

[Describe the correction of any arithmetic errors, application of any discounts, adjustments made for any nonmaterial nonconformities, errors or omissions, conversion to a common currency and application of any margin of preference.]

The bid with the lowest evaluated price was given a score of 100 and the other bids were given financial scores that were inversely proportional to the lowest priced bid.

*{Or describe other methodology for allocating financial scores, in accordance with the invitation.}*

See Table 4, which summarises the financial comparison.

**Total Technical and Financial Score**

A total score was obtained by weighting the technical and financial scores, using the weights stated in the invitation, and adding them together. The technical weight was [technical weight] % and the financial weight was [financial weight] %. The bids were ranked according to total score, with the highest total score being ranked first.

See Table 5, which summarises the technical and financial scores and weightings and the total scores and rankings.

**Recommendations** *{amend as appropriate}*

On the basis of the evaluation methodology and criteria stated in the Invitation, it is recommended that-

- (1) the best evaluated bid for the procurement of [list all items the recommendation relates to] is from [Name of Bidder] with a total evaluated price of [currency and amount].
- (2) negotiations are/are not required.
- (3) a post-qualification is/is not required.
- (4) the total proposed contract price is [currency and amount].
- (5) the total acquisition cost for the requirement is estimated to be [currency and amount], including [state all incidental costs included in the estimate].

**Disagreement by the Evaluation Committee** *{delete if not applicable}*

The evaluation committee could not reach a unanimous decision on the evaluation and this evaluation report details the view of the majority of the team.

[Give details of the issues where the team disagreed, the discussions held, the alternative views and the names of those with alternative views].

R (76), R (77), R(78)

R (79), R (80), R(81)

**EVALUATION REPORT**

PD Entity Name and Code	Wrks/Srvcs/Supplies?	Budget Year	Sequence Number

**Signed by the Evaluation Committee:**

I confirm that this Evaluation Report gives a complete and accurate report of the evaluation conducted:

Name: \_\_\_\_\_ Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Name: \_\_\_\_\_ Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Name: \_\_\_\_\_ Signature: \_\_\_\_\_ Date: \_\_\_\_\_

**Annexes: {amend as appropriate}**

PP Form 35: Record of Bid Opening

Table 4: Summary of Financial Comparison

Table 5: Technical and Financial Evaluation Summary

**Documents available from the Procurement and Disposal Unit: {amend as appropriate}**

Copy of all Financial Bids.

**TABLE 1 – PRELIMINARY EXAMINATION AND ASSESSMENT OF ELIGIBILITY**

PD Entity Code	Wrks/Srvcs/Supplies?	Budget Year	Sequence Number

	1	2	3	4	5	6
<b>Name of Bidder</b>						
<b>Eligibility criteria</b>						
<i>{Complete criteria as per solicitation document}</i>	C/NC	C/NC	C/NC	C/NC	C/NC	C/NC
	C/NC	C/NC	C/NC	C/NC	C/NC	C/NC
	C/NC	C/NC	C/NC	C/NC	C/NC	C/NC
	C/NC	C/NC	C/NC	C/NC	C/NC	C/NC
	C/NC	C/NC	C/NC	C/NC	C/NC	C/NC
	C/NC	C/NC	C/NC	C/NC	C/NC	C/NC
	C/NC	C/NC	C/NC	C/NC	C/NC	C/NC
	C/NC	C/NC	C/NC	C/NC	C/NC	C/NC
<b>Administrative Compliance Criteria</b>						
<i>{Complete criteria as per solicitation document}</i>	C/NC	C/NC	C/NC	C/NC	C/NC	C/NC
	C/NC	C/NC	C/NC	C/NC	C/NC	C/NC
	C/NC	C/NC	C/NC	C/NC	C/NC	C/NC
	C/NC	C/NC	C/NC	C/NC	C/NC	C/NC
	C/NC	C/NC	C/NC	C/NC	C/NC	C/NC
	C/NC	C/NC	C/NC	C/NC	C/NC	C/NC
	C/NC	C/NC	C/NC	C/NC	C/NC	C/NC
	C/NC	C/NC	C/NC	C/NC	C/NC	C/NC
	C/NC	C/NC	C/NC	C/NC	C/NC	C/NC
	C/NC	C/NC	C/NC	C/NC	C/NC	C/NC
	C/NC	C/NC	C/NC	C/NC	C/NC	C/NC
<b>Conclusion</b>	C/NC	C/NC	C/NC	C/NC	C/NC	C/NC

**KEY: C = Compliant NC = Non Compliant** *{delete that which is not applicable in the table above}*

This assessment eliminated [number] bidders, [Names of Bidders].



**TABLE 2 – SUMMARY OF DETAILED COMMERCIAL EVALUATION**

PD Entity Code	Wrks/Srvcs/Supplies?	Budget Year	Sequence Number

No.	Name of Bidder	Commercial Responsiveness	State reasons for non responsiveness. State any nonmaterial nonconformities, errors and omissions accepted and the way in which they were quantified
		R/NR	
		R/NR	
		R/NR	
		R/NR	
		R/NR	
		R/NR	
		R/NR	

**KEY: R = Responsive NR = Non Responsive** *{delete that which is not applicable in the table above}*

This examination eliminated [number] bidders, [Names of Bidders].  
*{Attach further details or workings if commercial evaluation is complex}.*

**TABLE 3 – SUMMARY OF DETAILED TECHNICAL EVALUATION**

PD Entity Code	Wrks/Srvcs/Supplies?	Budget Year	Sequence Number

Evaluation Criteria		Max Score	{Enter Average Scores from each Table 3A}					
{Complete criteria and maximum scores as listed in solicitation document}			Bidder 1	Bidder 2	Bidder 3	Bidder 4	Bidder 5	Bidder 6
<b>A</b>	<b>Main Criteria</b>							
A1	Sub-criteria							
A2								
A3								
A4								
<b>B</b>	<b>Main Criteria</b>							
B1	Sub-criteria							
B2								
B3								
B4								
<b>C</b>	<b>Main Criteria</b>							
C1	Sub-criteria							
C2								
C3								
C4								
<b>D</b>	<b>Main Criteria</b>							
D1	Sub-criteria							
D2								
D3								
D4								
<b>E</b>	<b>Main Criteria</b>							
E1	Sub-criteria							
E2								
E3								
E4								
<b>Totals</b>		<b>100</b>						
<b>Minimum Qualifying Mark</b>			<b>Pass / Fail</b>	<b>Pass / Fail</b>	<b>Pass / Fail</b>	<b>Pass / Fail</b>	<b>Pass / Fail</b>	<b>Pass / Fail</b>

**TABLE 3A – DETAILED TECHNICAL EVALUATION OF BID**

PD Entity Code	Wrks/Srvcs/Supplies?	Budget Year	Sequence Number

**BIDDER NAME:** \_\_\_\_\_

Evaluation Criteria		Max Score	<i>{Enter Individual Scores per Evaluator from each Table 3B}</i>					
<i>{Complete criteria and maximum scores as listed in solicitation document}</i>			Evaluator 1	Evaluator 2	Evaluator 3	Evaluator 4	Evaluator 5	Average
<b>A</b>	<b>Main Criteria</b>							
A1	Sub-criteria							
A2								
A3								
A4								
<b>B</b>	<b>Main Criteria</b>							
B1	Sub-criteria							
B2								
B3								
B4								
<b>C</b>	<b>Main Criteria</b>							
C1	Sub-criteria							
C2								
C3								
C4								
<b>D</b>	<b>Main Criteria</b>							
D1	Sub-criteria							
D2								
D3								
D4								
<b>E</b>	<b>Main Criteria</b>							
E1	Sub-criteria							
E2								
E3								
E4								
		<b>Totals</b>						

**TABLE 3B – EVALUATOR’S SCORE SHEET FOR DETAILED TECHNICAL EVALUATION**

PD Entity Code	Wrks/Srvcs/Supplies?	Budget Year	Sequence Number

EVALUATOR NAME: \_\_\_\_\_

Evaluation Criteria		Max Score	Bidder 1	Bidder 2	Bidder 3	Bidder 4	Bidder 5	Bidder 6
<i>{Complete criteria and maximum scores as listed in solicitation document}</i>								
<b>A</b>	<b>Main Criteria</b>							
A1	Sub-criteria							
A2								
A3								
A4								
<b>B</b>	<b>Main Criteria</b>							
B1	Sub-criteria							
B2								
B3								
B4								
<b>C</b>	<b>Main Criteria</b>							
C1	Sub-criteria							
C2								
C3								
C4								
<b>D</b>	<b>Main Criteria</b>							
D1	Sub-criteria							
D2								
D3								
D4								
<b>E</b>	<b>Main Criteria</b>							
E1	Sub-criteria							
E2								
E3								
E4								
<b>Totals</b>		<b>100</b>						

**TABLE 4 – SUMMARY OF FINANCIAL COMPARISON (Quality and Cost Based Selection)**

PD Entity Code	Wrks/Srvcs/Supplies?	Budget Year	Sequence Number

EVALUATION CURRENCY: \_\_\_\_\_

No	Name of Bidder	Bid Currency	Bid Total	Corrections made	Discounts	Adjustments made	Corrected Amount	Exchange Rate	Converted Total	Margin of Preference	Evaluated total	Financial Score*

{\*A score of 100 should be awarded to the lowest priced bid.

Other bids should be given a financial score inversely proportional to the lowest priced bid, using the following calculation:

Lowest Price ÷ Bid Price x 100 = Financial score.

Replace with other methodology for allocating financial scores if alternative methodology stated in the invitation.

This table may be replaced with a spreadsheet with automatic calculations}.

**TABLE 5 – SUMMARY OF COMBINED TECHNICAL AND FINANCIAL EVALUATION**

PD Entity Code	Wrks/Srvcs/Supplies?	Budget Year	Sequence Number

No	Bidder Name	Technical Score	Technical Weighting	Weighted Technical Score (WTS)	Financial score	Financial Weighting	Weighted Financial score (WFS)	Total Score	Rank
		Max 100	_____ %		Max 100	_____ %		WTS + WFS Max 100	

**EVALUATION REPORT FOR (FIXED BUDGET SELECTION)**

Procurement Reference Number					
PD Name and Entity Code	Wrks/Srvcs/Supplies?	Budget Year	Sequence Number	ITB Number	Contract Number

**Guidance Notes for Drafting** *{delete after completing Evaluation Report}*

*This form provides an outline format to assist evaluation committees in drafting evaluation reports for services, using the Fixed Budget Selection methodology. It is suitable for use under any method of procurement. The content should be amended as appropriate.*

*Italic text in {} brackets indicates either a drafting instruction, which should be deleted from the final report or a section included for a possible option, where the whole section should be deleted if not appropriate. Normal text in [] brackets indicates data which should be completed for each individual evaluation.*

**PART 1: BACKGROUND AND TECHNICAL EVALUATION**

**Introduction**

The requirement is for the provision of consultancy services for [subject of procurement].

The Procurement method used and approved by the Contracts Committee was [Open Domestic Bidding/Open International Bidding/Restricted Domestic Bidding/Restricted International Bidding/Quotations and Proposals Procurement/Direct Procurement.]

**Details of Invitation**

*{For Open Bidding without pre-qualification}*

The Bidding Document/Request for Proposals (RFP) was approved by the Contracts Committee on [date]. The Bid Notice was advertised on the [date] in [name of publications]. The list of Bidders purchasing the Bidding Documents was recorded using PP Form 30: Record of Issue of Solicitation Documents (Fee Payable), which is attached as an annex.

*{For Open Bidding with pre-qualification}*

The Invitation to Bid/Request for Proposals (RFP), evaluation of Expressions of Interest and shortlist were approved by the Contracts Committee on [date]. The list of bidders who were issued with the Bidding Documents was recorded using PP Form 31: Record of Issue of Solicitation Documents or Addenda (No Fee Payable), which is attached as an annex.

*{For Restricted Bidding or Quotations and Proposals Procurement}*

The Invitation to Bid/Request for Proposals (RFP) document and shortlist were approved by the Contracts Committee on [date]. The bidders who were issued with the Bidding Documents/RFP was recorded using PP Form 31: Record of Issue of Solicitation Documents or Addenda (No Fee Payable), which is attached as an annex.

*{For Direct Procurement}*

The solicitation document and proposed bidder were approved by the Contracts Committee on [date]. The solicitation document was issued on [date].

**Addenda to Solicitation Document**

*{For addenda}*

**EVALUATION REPORT FOR (FIXED BUDGET SELECTION)**

Procurement Reference Number					
PD Name and Entity Code	Wrks/Srvcs/Supplies?	Budget Year	Sequence Number	ITB Number	Contract Number

[Number] addendum/addenda was/were approved by the Contracts Committee on [date(s)] and issued. The issue of the addendum/addenda was recorded using PP Form 31: Record of Issue of Solicitation Documents or Addenda (No Fee Payable), which is attached as an annex.

*{For no addenda}*

No addenda to the solicitation document were required or issued.

**Pre-Bid Meeting** *{delete if not applicable}*

A pre-bid meeting was held at [location] on [date]. The meeting was recorded using PP Form 33: Record of Pre-Bid Meeting, which is attached as an annex.

**Details of Bid Closing**

*{For Open Bidding, Restricted Bidding and Quotations and Proposals Procurement}*

Bidding was closed on [date] at [time] at [location]. The receipt of bids was recorded using PP Form 34: Receipt of Bids, which is attached as an annex. Sealed Bids were required and received.

*{For Direct Procurement}*

The sealed bid was received on [date].

**Details of Bid Opening**

A Public Bid Opening was held at [location] on [date] at [time]. Outer envelopes were opened and checks made to ensure that they contained two separately sealed technical and financial bids. Technical bids only were opened, stamped and signed by the Chairperson. Financial bids were not opened and were put into secure storage. The Bid Opening and attendance was recorded using PP Form 35, which is attached as an annex.

**Details of Evaluation Committee**

An Evaluation committee comprising the following officials was nominated by the Procurement and Disposal Unit and approved by the Contracts Committee on [date]:

- [Name]                      [Position and Department]      (Chairperson Evaluation Committee)
- [Name]                      [Position and Department]
- [Name]                      [Position and Department]

**Details of evaluation method.**

The Evaluation method being used is Fixed Budget Selection (FBS) which involves the following procedure:

- i. Preliminary examination on a pass/fail basis to determine the eligibility of the bidders and assess their administrative compliance to the Invitation. Non eligible and non compliant bids were eliminated from further evaluation.
- ii. Detailed evaluation to determine the commercial responsiveness of bids and to assess the technical quality of bids against the criteria in the Terms of Reference in the invitation and determine their total technical score using a merit point system. Each bid was compared to the minimum technical qualifying mark stated in the invitation and those not meeting the minimum mark or that were not substantially commercial responsive were eliminated from further evaluation.



**EVALUATION REPORT FOR (FIXED BUDGET SELECTION)**

Procurement Reference Number					
PD Name and Entity Code	Wrks/Srvcs/Supplies?	Budget Year	Sequence Number	ITB Number	Contract Number

iii. Financial bids of those bidders who were substantially responsive and met the minimum qualifying mark will be opened and a financial comparison carried out to examine financial bids and reject any bids which exceed the budget. The bidder submitting the highest ranked technical bid among those within the budget will be recommended for contract award, subject to any negotiations required.

**Preliminary examination**

[Brief narrative on the result of the Preliminary examination and detailed justification with reasons why any Bids were declared non eligible or non compliant.]

See Table 1, which summarises the preliminary examination.

**Detailed Technical and Commercial Evaluation (of the eligible, compliant Bids)**

[Brief narrative on the results of the Detailed Commercial Evaluation and detailed justification with reasons why any bids were declared non responsive. Include details of any nonmaterial nonconformities, errors or omissions waived or rectified by the Evaluation committee and the way in which they were quantified for inclusion in the financial comparison. Include details of all clarifications requested and received from bidders.]

[Brief narrative on the results of the Detailed Technical Evaluation, including strong and weak points of each bid and reasons for any large differences in scores between evaluators. State how many bids reached the minimum qualifying mark and how many failed to reach it.]

See Table 2, which summarise the detailed commercial evaluation. A summary of the technical scores is given in Table 3, indicating which bids reached the minimum qualifying mark. The score sheets for each bid, showing the scores given by each evaluator against each of the criterion and the average scores are also included as Table 3A and the individual evaluators’ score sheets as Table 3B.

**Recommendation** *{amend as appropriate}*

On the basis of the detailed evaluation criteria and the minimum technical qualifying mark of [minimum qualifying mark] stated in the invitation, it is recommended that the financial bids of the following [number] bidders be opened:

Bid No	Name of Bidder	Technical Score

**Disagreement by the Evaluation Committee** *{delete if not applicable}*

**EVALUATION REPORT FOR (FIXED BUDGET SELECTION)**

Procurement Reference Number					
PD Name and Entity Code	Wrks/Srvcs/Supplies?	Budget Year	Sequence Number	ITB Number	Contract Number

The Evaluation committee could not reach a unanimous decision on the evaluation and this evaluation report details the view of the majority of the team.

[Give details of the issues where the team disagreed, the discussions held, the alternative views and the names of those with alternative views].

**Signed by the Evaluation Committee:**

I confirm that this Evaluation Report gives a complete and accurate report of the evaluation conducted:

Name: \_\_\_\_\_ Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Name: \_\_\_\_\_ Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Name: \_\_\_\_\_ Signature: \_\_\_\_\_ Date: \_\_\_\_\_

**Annexes: {amend as appropriate}**

PP Form 30: Record of Issue of Solicitation Documents (Fee Payable)

PP Form 31: Record of Issue of Solicitation Documents or Addenda (No Fee Payable)

PP Form 33: Record of Pre-Bid Meeting

PP Form 34: Record of Receipt of Bids

PP Form 35: Record of Bid Opening

Table 1: Preliminary Examination and Assessment of Eligibility

Table 2: Summary of Detailed Commercial Evaluation

Table 3: Summary of Detailed Technical Evaluation

Table 3A: Detailed Technical Evaluation of Bid (one for each bidder)

Table 3B: Evaluator’s Score Sheet for Technical Evaluation (one for each evaluator)

**Documents available from the Procurement and Disposal Unit: {amend as appropriate}**

Copy of the solicitation document.

Copy of all Technical Bids.

**EVALUATION REPORT FOR (FIXED BUDGET SELECTION)**

Procurement Reference Number					
PD Name and Entity Code	Wrks/Srvcs/Supplies?	Budget Year	Sequence Number	ITB Number	Contract Number

**PART 2: FINANCIAL COMPARISON**

**Details of Financial Bid Opening**

A Public Bid Opening was held at [location] on [date] at [time]. Financial bids were opened, stamped and signed by the Chairperson. Prices and technical scores read out. The Bid Opening and attendance was recorded using PP Form 35, which is attached as an annex.

**Financial comparison**

[Describe the correction of any arithmetic errors, application of any discounts, adjustments made for any nonmaterial nonconformities, errors or omissions, conversion to a common currency, application of any margin of preference and the rejection of any bids exceeding the budget.]

All bids that were within the budget were ranked according to their technical score, with the highest technical score being ranked first.

See Table 4, which summarises the financial comparison.

**Recommendations** *{amend as appropriate}*

On the basis of the evaluation methodology and criteria stated in the Invitation, it is recommended that-

- (1) the best evaluated bid for the procurement of [list all items the recommendation relates to] is from [Name of Bidder] with a total evaluated price of [currency and amount].
- (2) negotiations are/are not required.
- (3) a post-qualification is/is not required.
- (4) the total proposed contract price is [currency and amount].
- (5) the total acquisition cost for the requirement is estimated to be [currency and amount], including [state all incidental costs included in the estimate].

**Disagreement by the Evaluation Committee** *{delete if not applicable}*

The Evaluation committee could not reach a unanimous decision on the evaluation and this evaluation report details the view of the majority of the team.

[Give details of the issues where the team disagreed, the discussions held, the alternative views and the names of those with alternative views].

**Signed by the Evaluation Committee:**

I confirm that this Evaluation Report gives a complete and accurate report of the evaluation conducted:

Name: \_\_\_\_\_ Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Name: \_\_\_\_\_ Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Name: \_\_\_\_\_ Signature: \_\_\_\_\_ Date: \_\_\_\_\_

**Annexes: {amend as appropriate}**

**EVALUATION REPORT FOR (FIXED BUDGET SELECTION)**

Procurement Reference Number					
PD Name and Entity Code	Wrks/Srvcs/Supplies?	Budget Year	Sequence Number	ITB Number	Contract Number

PP Form 35: Record of Bid Opening

Table 3: Summary of Financial Comparison

**Documents available from the Procurement and Disposal Unit: {amend as appropriate}**

Copy of all Financial Bids.

**TABLE 1 – PRELIMINARY EXAMINATION AND ASSESSMENT OF ELIGIBILITY**

Procurement Reference Number					
PD Entity Code	Wrks/Srvcs/Supplies?	Budget Year	Sequence Number	ITB Number	Contract Number

	1	2	3	4	5	6
<b>Name of Bidder</b>						
<b>Eligibility criteria</b>						
<i>{Complete criteria as per solicitation document}</i>	C/NC	C/NC	C/NC	C/NC	C/NC	C/NC
	C/NC	C/NC	C/NC	C/NC	C/NC	C/NC
	C/NC	C/NC	C/NC	C/NC	C/NC	C/NC
	C/NC	C/NC	C/NC	C/NC	C/NC	C/NC
	C/NC	C/NC	C/NC	C/NC	C/NC	C/NC
	C/NC	C/NC	C/NC	C/NC	C/NC	C/NC
	C/NC	C/NC	C/NC	C/NC	C/NC	C/NC
	C/NC	C/NC	C/NC	C/NC	C/NC	C/NC
	C/NC	C/NC	C/NC	C/NC	C/NC	C/NC
<b>Administrative Compliance Criteria</b>						
<i>{Complete criteria as per solicitation document}</i>	C/NC	C/NC	C/NC	C/NC	C/NC	C/NC
	C/NC	C/NC	C/NC	C/NC	C/NC	C/NC
	C/NC	C/NC	C/NC	C/NC	C/NC	C/NC
	C/NC	C/NC	C/NC	C/NC	C/NC	C/NC
	C/NC	C/NC	C/NC	C/NC	C/NC	C/NC
	C/NC	C/NC	C/NC	C/NC	C/NC	C/NC
	C/NC	C/NC	C/NC	C/NC	C/NC	C/NC
	C/NC	C/NC	C/NC	C/NC	C/NC	C/NC
	C/NC	C/NC	C/NC	C/NC	C/NC	C/NC
	C/NC	C/NC	C/NC	C/NC	C/NC	C/NC
	C/NC	C/NC	C/NC	C/NC	C/NC	C/NC
	C/NC	C/NC	C/NC	C/NC	C/NC	C/NC
	C/NC	C/NC	C/NC	C/NC	C/NC	C/NC
	C/NC	C/NC	C/NC	C/NC	C/NC	C/NC
	C/NC	C/NC	C/NC	C/NC	C/NC	C/NC
	C/NC	C/NC	C/NC	C/NC	C/NC	C/NC
	C/NC	C/NC	C/NC	C/NC	C/NC	C/NC
<b>Conclusion</b>	C/NC	C/NC	C/NC	C/NC	C/NC	C/NC

**KEY: C = Compliant NC = Non Compliant** *{delete that which is not applicable in the table above}*

This assessment eliminated [number] bidders, [Names of Bidders].

**TABLE 2 – SUMMARY OF DETAILED COMMERCIAL EVALUATION**

Procurement Reference Number					
PD Entity Code	Wrks/Srvcs/Supplies?	Budget Year	Sequence Number	ITB Number	Contract Number

No.	Name of Bidder	Commercial Responsiveness	State reasons for non responsiveness. State any nonmaterial nonconformities, errors and omissions accepted and the way in which they were quantified
		R/NR	
		R/NR	
		R/NR	
		R/NR	
		R/NR	
		R/NR	
		R/NR	

**KEY: R = Responsive NR = Non Responsive** {delete that which is not applicable in the table above}

This examination eliminated [number] bidders, [Names of Bidders].  
 {Attach further details or workings if commercial evaluation is complex}.

**TABLE 3 – SUMMARY OF DETAILED TECHNICAL EVALUATION**

Procurement Reference Number					
PD Entity Code	Wrks/Srvcs/Supplies?	Budget Year	Sequence Number	ITB Number	Contract Number

Evaluation Criteria		Max Score	<i>{Enter Average Scores from each Table 3A}</i>					
<i>{Complete criteria and maximum scores as listed in solicitation document}</i>			Bidder 1	Bidder 2	Bidder 3	Bidder 4	Bidder 5	Bidder 6
<b>A</b>	<b>Main Criteria</b>							
A1	Sub-criteria							
A2								
A3								
A4								
<b>B</b>	<b>Main Criteria</b>							
B1	Sub-criteria							
B2								
B3								
B4								
<b>C</b>	<b>Main Criteria</b>							
C1	Sub-criteria							
C2								
C3								
C4								
<b>D</b>	<b>Main Criteria</b>							
D1	Sub-criteria							
D2								
D3								
D4								
<b>E</b>	<b>Main Criteria</b>							
E1	Sub-criteria							
E2								
E3								
E4								
<b>Totals</b>		<b>100</b>						
<b>Minimum Qualifying Mark</b>			<b>Pass / Fail</b>	<b>Pass / Fail</b>	<b>Pass / Fail</b>	<b>Pass / Fail</b>	<b>Pass / Fail</b>	<b>Pass / Fail</b>

**TABLE 3A – DETAILED TECHNICAL EVALUATION OF BID**

Procurement Reference Number					
PD Entity Code	Wrks/Srvcs/Supplies?	Budget Year	Sequence Number	ITB Number	Contract Number

**BIDDER NAME:** \_\_\_\_\_

Evaluation Criteria		Max Score	<i>{Enter Individual Scores per Evaluator from each Table 3B}</i>					
<i>{Complete criteria and maximum scores as listed in solicitation document}</i>			Evaluator 1	Evaluator 2	Evaluator 3	Evaluator 4	Evaluator 5	Average
<b>A</b>	<b>Main Criteria</b>							
A1	Sub-criteria							
A2								
A3								
A4								
<b>B</b>	<b>Main Criteria</b>							
B1	Sub-criteria							
B2								
B3								
B4								
<b>C</b>	<b>Main Criteria</b>							
C1	Sub-criteria							
C2								
C3								
C4								
<b>D</b>	<b>Main Criteria</b>							
D1	Sub-criteria							
D2								
D3								
D4								
<b>E</b>	<b>Main Criteria</b>							
E1	Sub-criteria							
E2								
E3								
E4								
		<b>Totals</b>						



**TABLE 3B – EVALUATOR’S SCORE SHEET FOR DETAILED TECHNICAL EVALUATION**

Procurement Reference Number					
PD Entity Code	Wrks/Srvcs/Supplies?	Budget Year	Sequence Number	ITB Number	Contract Number

EVALUATOR NAME: \_\_\_\_\_

Evaluation Criteria		Max Score	Procurement Reference Number					
<i>{Complete criteria and maximum scores as listed in solicitation document}</i>			Bidder 1	Bidder 2	Bidder 3	Bidder 4	Bidder 5	Bidder 6
<b>A</b>	<b>Main Criteria</b>							
A1	Sub-criteria							
A2								
A3								
A4								
<b>B</b>	<b>Main Criteria</b>							
B1	Sub-criteria							
B2								
B3								
B4								
<b>C</b>	<b>Main Criteria</b>							
C1	Sub-criteria							
C2								
C3								
C4								
<b>D</b>	<b>Main Criteria</b>							
D1	Sub-criteria							
D2								
D3								
D4								
<b>E</b>	<b>Main Criteria</b>							
E1	Sub-criteria							
E2								
E3								
E4								
<b>Totals</b>		<b>100</b>						

**TABLE 4 – SUMMARY OF FINANCIAL COMPARISON ( Fixed Budget Selection)**

PD Entity Code	Wrks/Srvcs/Supplies?	Budget Year	Sequence Number

**BUDGET:** \_\_\_\_\_

**EVALUATION CURRENCY:** \_\_\_\_\_

No	Name of Bidder	Bid Currency	Bid Total	Corrections made	Discounts	Adjustments made	Corrected Amount	Exchange Rate	Converted Total	Margin of Preference	Evaluated total	Technical Score	Rank*

*{\*Enter "Rejected" if Evaluated Total exceeds Budget.  
If less than budget, rank according to technical score, with the highest technical score as number 1}.*

**EVALUATION REPORT (QUALITY BASED SELECTION)**

PD Entity Name and Code	Wrks/Srvcs/Supplies?	Budget Year	Sequence Number

**Guidance Notes for Drafting** *{delete after completing Evaluation Report}*

*This form provides an outline format to assist evaluation committees in drafting evaluation reports for services, using the Quality Based Selection methodology. It is suitable for use under any method of procurement. The content should be amended as appropriate.*

*Italic text in {} brackets indicates either a drafting instruction, which should be deleted from the final report or a section included for a possible option, where the whole section should be deleted if not appropriate. Normal text in [] brackets indicates data which should be completed for each individual evaluation.*

**PART 1: BACKGROUND AND TECHNICAL EVALUATION**

**Introduction**

The requirement is for the provision of consultancy services for [subject of procurement].

The Procurement method used and approved by the Contracts Committee was [Open Domestic Bidding/Open International Bidding/Restricted Domestic Bidding/Restricted International Bidding/Quotations and Proposals Procurement/Direct Procurement.]

**Details of Invitation**

*{For Open Bidding without pre-qualification}*

The Bidding Document/Request for Proposals (RFP) was approved by the Contracts Committee on [date]. The Bid Notice was advertised on the [date] in [name of publications]. The list of Bidders purchasing the Bidding Documents was recorded using PP Form 30: Record of Issue of Solicitation Documents (Fee Payable), which is attached as an annex.

*{For Open Bidding with pre-qualification}*

The Invitation to Bid/Request for Proposals (RFP), evaluation of Expressions of Interest and shortlist were approved by the Contracts Committee on [date]. The list of bidders who were issued with the Bidding Documents was recorded using PP Form 31: Record of Issue of Solicitation Documents or Addenda (No Fee Payable), which is attached as an annex.

*{For Restricted Bidding or Quotations and Proposals Procurement}*

The Invitation to Bid/Request for Proposals (RFP) document and shortlist were approved by the Contracts Committee on [date]. The bidders who were issued with the Bidding Documents/RFP was recorded using PP Form 31: Record of Issue of Solicitation Documents or Addenda (No Fee Payable), which is attached as an annex.

*{For Direct Procurement}*

The solicitation document and proposed bidder were approved by the Contracts Committee on [date]. The solicitation document was issued on [date].

**Addenda to Solicitation Document**

*{For addenda}*

[Number] addendum/addenda was/were approved by the Contracts Committee on [date(s)] and issued. The issue of the addendum/addenda was recorded using PP Form 31: Record of Issue of Solicitation Documents or Addenda (No Fee Payable), which is attached as an annex.

**EVALUATION REPORT (QUALITY BASED SELECTION)**

PD Entity Name and Code	Wrks/Srvcs/Supplies?	Budget Year	Sequence Number

*{For no addenda}*

No addenda to the solicitation document were required or issued.

**Pre-Bid Meeting** *{delete if not applicable}*

A pre-bid meeting was held at [location] on [date]. The meeting was recorded using PP Form 33: Record of Pre-Bid Meeting, which is attached as an annex.

**Details of Bid Closing**

*{For Open Bidding, Restricted Bidding and Quotations and Proposals Procurement}*

Bidding was closed on [date] at [time] at [location]. The receipt of bids was recorded using PP Form 34: Receipt of Bids, which is attached as an annex. Sealed Bids were required and received.

*{For Direct Procurement}*

The sealed bid was received on [date].

**Details of Bid Opening**

A Public Bid Opening was held at [location] on [date] at [time]. Outer envelopes were opened and checks made to ensure that they contained two separately sealed technical and financial bids. Technical bids only were opened, stamped and signed by the Chairperson. Financial bids were not opened and were put into secure storage. The Bid Opening and attendance was recorded using PP Form 35, which is attached as an annex.

**Details of Evaluation Committee**

An evaluation committee comprising the following officials was nominated by the Procurement and Disposal Unit and approved by the Contracts Committee on [date]:

- [Name] [Position and Department] (Chairperson Evaluation Committee)
- [Name] [Position and Department]
- [Name] [Position and Department]

**Details of evaluation method.**

The Evaluation method being used is Quality Based Selection (QBS), using a one-stage, two-envelope submission method, which involves the following procedure:

- i. Preliminary examination on a pass/fail basis to determine the eligibility of the bidders and assess their administrative compliance to the Invitation. Non eligible and non compliant bids were eliminated from further evaluation.
- ii. Detailed evaluation to determine the commercial responsiveness of bids and to assess the technical quality of bids against the criteria in the Terms of Reference in the invitation and determine their total technical score using a merit point system. Bids that were not substantially commercial responsive were eliminated from further evaluation. Bids that were substantially responsive were ranked according to technical score.
- iii. The financial bid of the bidder with the highest technical mark will be opened and a financial comparison carried out to examine the financial bid. The bidder will be recommended for contract award subject to any negotiations required.

**EVALUATION REPORT (QUALITY BASED SELECTION)**

PD Entity Name and Code	Wrks/Srvcs/Supplies?	Budget Year	Sequence Number

**Preliminary examination**

[Brief narrative on the result of the Preliminary examination and detailed justification with reasons why any Bids were declared non eligible or non compliant.]

See Table 1, which summarises the preliminary examination.

**Detailed Technical and Commercial Evaluation (of the eligible, compliant Bids)**

[Brief narrative on the results of the Detailed Commercial Evaluation and detailed justification with reasons why any bids were declared non responsive. Include details of any nonmaterial nonconformities, errors or omissions waived or rectified by the evaluation committee and the way in which they were quantified for inclusion in the financial comparison. Include details of all clarifications requested and received from bidders.]

[Brief narrative on the results of the Detailed Technical Evaluation, including strong and weak points of each bid and reasons for any large differences in scores between evaluators. State which bid obtained the highest technical score.]

See Table 2, which summarise the detailed commercial evaluation. A summary of the technical scores is given in Table 3, indicating which bids reached the minimum qualifying mark. The score sheets for each bid, showing the scores given by each evaluator against each of the criterion and the average scores are also included as Table 3A and the individual evaluators’ score sheets as Table 3B.

**Recommendation** *{amend as appropriate}*

On the basis of the detailed evaluation criteria stated in the invitation, it is recommended that the financial bid of [name of bidder] be opened and preparations be made for negotiations.

**Disagreement by the Evaluation Committee** *{delete if not applicable}*

The evaluation committee could not reach a unanimous decision on the evaluation and this evaluation report details the view of the majority of the team.

[Give details of the issues where the team disagreed, the discussions held, the alternative views and the names of those with alternative views].

**Signed by the Evaluation Committee:**

I confirm that this Evaluation Report gives a complete and accurate report of the evaluation conducted:

Name: \_\_\_\_\_ Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Name: \_\_\_\_\_ Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Name: \_\_\_\_\_ Signature: \_\_\_\_\_ Date: \_\_\_\_\_

**Annexes: {amend as appropriate}**

PP Form 30: Record of Issue of Solicitation Documents (Fee Payable)

PP Form 31: Record of Issue of Solicitation Documents or Addenda (No Fee Payable)

PP Form 33: Record of Pre-Bid Meeting

PP Form 34: Record of Receipt of Bids

**EVALUATION REPORT (QUALITY BASED SELECTION)**

PD Entity Name and Code	Wrks/Srvcs/Supplies?	Budget Year	Sequence Number

PP Form 35: Record of Bid Opening

Table 1: Preliminary Examination and Assessment of Eligibility

Table 2: Summary of Detailed Commercial Evaluation

Table 3: Summary of Detailed Technical Evaluation

Table 3A: Detailed Technical Evaluation of Bid (one for each bidder)

Table 3B: Evaluator's Score Sheet for Technical Evaluation (one for each evaluator)

**Documents available from the Procurement and Disposal Unit: {amend as appropriate}**

Copy of the solicitation document.

Copy of all Technical Bids.

**EVALUATION REPORT (QUALITY BASED SELECTION)**

PD Entity Name and Code	Wrks/Srvcs/Supplies?	Budget Year	Sequence Number

**PART 2: FINANCIAL COMPARISON**

**Details of Financial Bid Opening**

A Public Bid Opening was held at [location] on [date] at [time]. The financial bid was opened, stamped and signed by the Chairperson. The price and technical score read out. The Bid Opening and attendance was recorded using PP Form 35, which is attached as an annex.

**Financial comparison**

[Describe the correction of any arithmetic errors.]

See Table 4, which summarises the financial comparison.

**Recommendations** *{amend as appropriate}*

On the basis of the evaluation methodology and criteria stated in the Invitation, it is recommended that-

- (1) the best evaluated bid for the procurement of [list all items the recommendation relates to] is from [Name of Bidder] with a total evaluated price of [currency and amount].
- (2) negotiations are/are not required.
- (3) a post-qualification is/is not required.
- (4) the total proposed contract price is [currency and amount].
- (5) the total acquisition cost for the requirement is estimated to be [currency and amount], including [state all incidental costs included in the estimate].

**Disagreement by the Evaluation Committee** *{delete if not applicable}*

The evaluation committee could not reach a unanimous decision on the evaluation and this evaluation report details the view of the majority of the team.

[Give details of the issues where the team disagreed, the discussions held, the alternative views and the names of those with alternative views].

**Signed by the Evaluation Committee:**

I confirm that this Evaluation Report gives a complete and accurate report of the evaluation conducted:

Name: \_\_\_\_\_ Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Name: \_\_\_\_\_ Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Name: \_\_\_\_\_ Signature: \_\_\_\_\_ Date: \_\_\_\_\_

**EVALUATION REPORT (QUALITY BASED SELECTION)**

PD Entity Name and Code	Wrks/Srvcs/Supplies?	Budget Year	Sequence Number

**Annexes: {amend as appropriate}**

PP Form 35: Record of Bid Opening

Table 4: Summary of Financial Comparison

**Documents available from the Procurement and Disposal Unit: {amend as appropriate}**

Copy of the Financial Bid.



**TABLE 1 – PRELIMINARY EXAMINATION AND ASSESSMENT OF ELIGIBILITY**

Procurement Reference Number					
PD Entity Code	Wrks/Srvcs/Supplies?	Budget Year	Sequence Number	ITB Number	Contract Number

	1	2	3	4	5	6
Name of Bidder						
<b>Eligibility criteria</b>						
<i>{Complete criteria as per solicitation document}</i>	C/NC	C/NC	C/NC	C/NC	C/NC	C/NC
	C/NC	C/NC	C/NC	C/NC	C/NC	C/NC
	C/NC	C/NC	C/NC	C/NC	C/NC	C/NC
	C/NC	C/NC	C/NC	C/NC	C/NC	C/NC
	C/NC	C/NC	C/NC	C/NC	C/NC	C/NC
	C/NC	C/NC	C/NC	C/NC	C/NC	C/NC
	C/NC	C/NC	C/NC	C/NC	C/NC	C/NC
	C/NC	C/NC	C/NC	C/NC	C/NC	C/NC
<b>Administrative Compliance Criteria</b>						
<i>{Complete criteria as per solicitation document}</i>	C/NC	C/NC	C/NC	C/NC	C/NC	C/NC
	C/NC	C/NC	C/NC	C/NC	C/NC	C/NC
	C/NC	C/NC	C/NC	C/NC	C/NC	C/NC
	C/NC	C/NC	C/NC	C/NC	C/NC	C/NC
	C/NC	C/NC	C/NC	C/NC	C/NC	C/NC
	C/NC	C/NC	C/NC	C/NC	C/NC	C/NC
	C/NC	C/NC	C/NC	C/NC	C/NC	C/NC
	C/NC	C/NC	C/NC	C/NC	C/NC	C/NC
	C/NC	C/NC	C/NC	C/NC	C/NC	C/NC
	C/NC	C/NC	C/NC	C/NC	C/NC	C/NC
	C/NC	C/NC	C/NC	C/NC	C/NC	C/NC
	C/NC	C/NC	C/NC	C/NC	C/NC	C/NC
<b>Conclusion</b>	C/NC	C/NC	C/NC	C/NC	C/NC	C/NC

**KEY: C = Compliant NC = Non Compliant** *{delete that which is not applicable in the table above}*

This assessment eliminated [number] bidders, [Names of Bidders].

**ITB NUMBERTABLE 2 – SUMMARY OF DETAILED COMMERCIAL EVALUATION**

Procurement Reference Number					
PD Entity Code	Wrks/Srvcs/Supplies?	Budget Year	Sequence Number	ITB Number	Contract Number

No.	Name of Bidder	Commercial Responsiveness	State reasons for non responsiveness. State any nonmaterial nonconformities, errors and omissions accepted and the way in which they were quantified
		R/NR	
		R/NR	
		R/NR	
		R/NR	
		R/NR	
		R/NR	
		R/NR	

**KEY: R = Responsive NR = Non Responsive** {delete that which is not applicable in the table above}

This examination eliminated [number] bidders, [Names of Bidders].  
 {Attach further details or workings if commercial evaluation is complex}.

**TABLE 3 – SUMMARY OF DETAILED TECHNICAL EVALUATION**

Procurement Reference Number					
PD Entity Code	Wrks/Srvcs/Supplies?	Budget Year	Sequence Number	ITB Number	Contract Number

Evaluation Criteria		Max Score	{Enter Average Scores from each Table 3A}					
{Complete criteria and maximum scores as listed in solicitation document}			Bidder 1	Bidder 2	Bidder 3	Bidder 4	Bidder 5	Bidder 6
<b>A</b>	<b>Main Criteria</b>							
A1	Sub-criteria							
A2								
A3								
A4								
<b>B</b>	<b>Main Criteria</b>							
B1	Sub-criteria							
B2								
B3								
B4								
<b>C</b>	<b>Main Criteria</b>							
C1	Sub-criteria							
C2								
C3								
C4								
<b>D</b>	<b>Main Criteria</b>							
D1	Sub-criteria							
D2								
D3								
D4								
<b>E</b>	<b>Main Criteria</b>							
E1	Sub-criteria							
E2								
E3								
E4								
<b>Totals</b>		<b>100</b>						
<b>Rank (highest score as number 1)</b>								

**TABLE 3A – DETAILED TECHNICAL EVALUATION OF BID**

Procurement Reference Number					
PD Entity Code	Wrks/Srvcs/Supplies?	Budget Year	Sequence Number	ITB Number	Contract Number

**BIDDER NAME:** \_\_\_\_\_

Evaluation Criteria		Max Score	<i>{Enter Individual Scores per Evaluator from each Table 3B}</i>					
<i>{Complete criteria and maximum scores as listed in solicitation document}</i>			Evaluator 1	Evaluator 2	Evaluator 3	Evaluator 4	Evaluator 5	Average
<b>A</b>	<b>Main Criteria</b>							
A1	Sub-criteria							
A2								
A3								
A4								
<b>B</b>	<b>Main Criteria</b>							
B1	Sub-criteria							
B2								
B3								
B4								
<b>C</b>	<b>Main Criteria</b>							
C1	Sub-criteria							
C2								
C3								
C4								
<b>D</b>	<b>Main Criteria</b>							
D1	Sub-criteria							
D2								
D3								
D4								
<b>E</b>	<b>Main Criteria</b>							
E1	Sub-criteria							
E2								
E3								
E4								
		<b>Totals</b>						

**TABLE 3B – EVALUATOR’S SCORE SHEET FOR DETAILED TECHNICAL EVALUATION**

Procurement Reference Number					
PD Entity Code	Wrks/Srvcs/Supplies?	Budget Year	Sequence Number	ITB Number	Contract Number

EVALUATOR NAME: \_\_\_\_\_

Evaluation Criteria		Max Score	Procurement Reference Number					
<i>{Complete criteria and maximum scores as listed in solicitation document}</i>			Bidder 1	Bidder 2	Bidder 3	Bidder 4	Bidder 5	Bidder 6
<b>A</b>	<b>Main Criteria</b>							
A1	Sub-criteria							
A2								
A3								
A4								
<b>B</b>	<b>Main Criteria</b>							
B1	Sub-criteria							
B2								
B3								
B4								
<b>C</b>	<b>Main Criteria</b>							
C1	Sub-criteria							
C2								
C3								
C4								
<b>D</b>	<b>Main Criteria</b>							
D1	Sub-criteria							
D2								
D3								
D4								
<b>E</b>	<b>Main Criteria</b>							
E1	Sub-criteria							
E2								
E3								
E4								
<b>Totals</b>		<b>100</b>						

**TABLE 4 – SUMMARY OF FINANCIAL COMPARISON (Quality Based Selection)**

PD Entity Code	Wrks/Srvcs/Supplies?	Budget Year	Sequence Number

No	Bidder Name	Bid Currency	Bid Total (Read Out)	Corrections made	Discounts	Corrected Bid Total

**EVALUATION REPORT (LEAST COST SELECTION)**

PD Name and Entity Code	Wrks/Srvcs/Supplies?	Budget Year	Sequence Number

**Guidance Notes for Drafting** *{delete after completing Evaluation Report}*

*This form provides an outline format to assist evaluation committees in drafting evaluation reports for services, using the Least Cost Selection methodology. It is suitable for use under any method of procurement. The content should be amended as appropriate.*

*Italic text in {} brackets indicates either a drafting instruction, which should be deleted from the final report or a section included for a possible option, where the whole section should be deleted if not appropriate. Normal text in [] brackets indicates data which should be completed for each individual evaluation.*

**PART 1: BACKGROUND AND TECHNICAL EVALUATION**

**Introduction**

The requirement is for the provision of consultancy services for [subject of procurement].

The Procurement method used and approved by the Contracts Committee was [Open Domestic Bidding/Open International Bidding/Restricted Domestic Bidding/Restricted International Bidding/Quotations and Proposals Procurement/Direct Procurement.]

**Details of Invitation**

*{For Open Bidding without pre-qualification}*

The Bidding Document/Request for Proposals (RFP) was approved by the Contracts Committee on [date]. The Bid Notice was advertised on the [date] in [name of publications]. The list of Bidders purchasing the Bidding Documents was recorded using PP Form 30: Record of Issue of Solicitation Documents (Fee Payable), which is attached as an annex.

*{For Open Bidding with pre-qualification}*

The Invitation to Bid/Request for Proposals (RFP), evaluation of Expressions of Interest and shortlist were approved by the Contracts Committee on [date]. The list of bidders who were issued with the Bidding Documents was recorded using PP Form 31: Record of Issue of Solicitation Documents or Addenda (No Fee Payable), which is attached as an annex.

*{For Restricted Bidding or Quotations and Proposals Procurement}*

The Invitation to Bid/Request for Proposals (RFP) document and shortlist were approved by the Contracts Committee on [date]. The bidders who were issued with the Bidding Documents/RFP was recorded using PP Form 31: Record of Issue of Solicitation Documents or Addenda (No Fee Payable), which is attached as an annex.

*{For Direct Procurement}*

The solicitation document and proposed bidder were approved by the Contracts Committee on [date]. The solicitation document was issued on [date].

**Addenda to Solicitation Document**

*{For addenda}*

[Number] addendum/addenda was/were approved by the Contracts Committee on [date(s)] and issued. The issue of the addendum/addenda was recorded using PP Form 31: Record of Issue of Solicitation Documents or Addenda (No Fee Payable), which is attached as an annex.

**EVALUATION REPORT (LEAST COST SELECTION)**

PD Name and Entity Code	Wrks/Srvcs/Supplies?	Budget Year	Sequence Number

*{For no addenda}*

No addenda to the solicitation document were required or issued.

**Pre-Bid Meeting** *{delete if not applicable}*

A pre-bid meeting was held at [location] on [date]. The meeting was recorded using PP Form 33: Record of Pre-Bid Meeting, which is attached as an annex.

**Details of Bid Closing**

*{For Open Bidding, Restricted Bidding and Quotations and Proposals Procurement}*

Bidding was closed on [date] at [time] at [location]. The receipt of bids was recorded using PP Form 34: Receipt of Bids, which is attached as an annex. Sealed Bids were required and received.

*{For Direct Procurement}*

The sealed bid was received on [date].

**Details of Bid Opening**

A Public Bid Opening was held at [location] on [date] at [time]. Outer envelopes were opened and checks made to ensure that they contained two separately sealed technical and financial bids. Technical bids only were opened, stamped and signed by the Chairperson. Financial bids were not opened and were put into secure storage. The Bid Opening and attendance was recorded using PP Form 35, which is attached as an annex.

**Details of Evaluation Committee**

An Evaluation committee comprising the following officials was nominated by the Procurement and Disposal Unit and approved by the Contracts Committee on [date]:

- [Name]                      [Position and Department]      (Chairperson Evaluation Committee)
- [Name]                      [Position and Department]
- [Name]                      [Position and Department]

**Details of evaluation method.**

The Evaluation method being used is Least Cost Selection, which involves the following procedure:

- i. Preliminary examination on a pass/fail basis to determine the eligibility of the bidders and assess their administrative compliance to the Invitation. Non eligible and non compliant bids were eliminated from further evaluation.
- ii. Detailed evaluation to determine the commercial responsiveness of bids and to assess the technical quality of bids against the criteria in the Terms of Reference in the invitation and determine their total technical score using a merit point system. Each bid was compared to the minimum technical qualifying mark stated in the invitation and those not meeting the minimum mark or that were not substantially commercial responsive were eliminated from further evaluation.
- iii. Financial bids of those bidders who were substantially responsive and met the minimum qualifying mark will be opened and a financial comparison carried out to examine financial bids and rank the bids according to price. The bidder submitting the lowest priced bid will be ranked first and recommended for contract award, subject to any negotiations required.



**EVALUATION REPORT (LEAST COST SELECTION)**

PD Name and Entity Code	Wrks/Srvcs/Supplies?	Budget Year	Sequence Number

**Preliminary examination**

[Brief narrative on the result of the Preliminary examination and detailed justification with reasons why any Bids were declared non eligible or non compliant.]

See Table 1, which summarises the preliminary examination.

**Detailed Technical and Commercial Evaluation (of the eligible, compliant Bids)**

[Brief narrative on the results of the Detailed Commercial Evaluation and detailed justification with reasons why any bids were declared non responsive. Include details of any nonmaterial nonconformities, errors or omissions waived or rectified by the Evaluation committee and the way in which they were quantified for inclusion in the financial comparison. Include details of all clarifications requested and received from bidders.]

[Brief narrative on the results of the Detailed Technical Evaluation, including strong and weak points of each bid and reasons for any large differences in scores between evaluators. State how many bids reached the minimum qualifying mark and how many failed to reach it.]

See Table 2, which summarise the detailed commercial evaluation. A summary of the technical scores is given in Table 3, indicating which bids reached the minimum qualifying mark. The score sheets for each bid, showing the scores given by each evaluator against each of the criterion and the average scores are also included as Table 3A and the individual evaluators’ score sheets as Table 3B.

**Recommendation** *{amend as appropriate}*

On the basis of the detailed evaluation criteria and the minimum technical qualifying mark of [minimum qualifying mark] stated in the invitation, it is recommended that the financial bids of the following [number] bidders be opened:

Bid No	Name of Bidder	Technical Score

**Disagreement by the Evaluation Committee** *{delete if not applicable}*

The Evaluation committee could not reach a unanimous decision on the evaluation and this evaluation report details the view of the majority of the team.

[Give details of the issues where the team disagreed, the discussions held, the alternative views and the names of those with alternative views].

**Signed by the Evaluation Committee:**

I confirm that this Evaluation Report gives a complete and accurate report of the evaluation conducted:

**EVALUATION REPORT (LEAST COST SELECTION)**

PD Name and Entity Code	Wrks/Srvcs/Supplies?	Budget Year	Sequence Number

Name: \_\_\_\_\_ Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Name: \_\_\_\_\_ Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Name: \_\_\_\_\_ Signature: \_\_\_\_\_ Date: \_\_\_\_\_

**Annexes: {amend as appropriate}**

PP Form 30: Record of Issue of Solicitation Documents (Fee Payable)

PP Form 31: Record of Issue of Solicitation Documents or Addenda (No Fee Payable)

PP Form 33: Record of Pre-Bid Meeting

PP Form 34: Record of Receipt of Bids

PP Form 35: Record of Bid Opening

Table 1: Preliminary Examination and Assessment of Eligibility

Table 2: Summary of Detailed Commercial Evaluation

Table 3: Summary of Detailed Technical Evaluation

Table 3A: Detailed Technical Evaluation of Bid (one for each bidder)

Table 3B: Evaluator’s Score Sheet for Technical Evaluation (one for each evaluator)

**Documents available from the Procurement and Disposal Unit: {amend as appropriate}**

Copy of the solicitation document.

Copy of all Technical Bids.

**EVALUATION REPORT (LEAST COST SELECTION)**

PD Name and Entity Code	Wrks/Srvcs/Supplies?	Budget Year	Sequence Number

**PART 2: FINANCIAL COMPARISON**

**Details of Financial Bid Opening**

A Public Bid Opening was held at [location] on [date] at [time]. Financial bids were opened, stamped and signed by the Chairperson. Prices and technical scores read out. The Bid Opening and attendance was recorded using PP Form 35, which is attached as an annex.

**Financial comparison**

[Describe the correction of any arithmetic errors, application of any discounts, adjustments made for any nonmaterial nonconformities, errors or omissions, conversion to a common currency and application of any margin of preference.]

All bids were ranked, with the lowest priced being ranked first.

See Table 4, which summarises the financial comparison.

**Recommendations** *{amend as appropriate}*

On the basis of the evaluation methodology and criteria stated in the Invitation, it is recommended that-

- (1) the best evaluated bid for the procurement of [list all items the recommendation relates to] is from [Name of Bidder] with a total evaluated price of [currency and amount].
- (2) negotiations are/are not required.
- (3) a post-qualification is/is not required.
- (4) the total proposed contract price is [currency and amount].
- (5) the total acquisition cost for the requirement is estimated to be [currency and amount], including [state all incidental costs included in the estimate].

**Disagreement by the Evaluation Committee** *{delete if not applicable}*

The Evaluation committee could not reach a unanimous decision on the evaluation and this evaluation report details the view of the majority of the team.

[Give details of the issues where the team disagreed, the discussions held, the alternative views and the names of those with alternative views].

**Signed by the Evaluation Committee:**

I confirm that this Evaluation Report gives a complete and accurate report of the evaluation conducted:

Name: \_\_\_\_\_ Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Name: \_\_\_\_\_ Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Name: \_\_\_\_\_ Signature: \_\_\_\_\_ Date: \_\_\_\_\_

**EVALUATION REPORT (LEAST COST SELECTION)**

PD Name and Entity Code	Wrks/Srvcs/Supplies?	Budget Year	Sequence Number

**Annexes: {amend as appropriate}**

LG Form 10: Record of Bid Opening

Table 3: Summary of Financial Comparison

**Documents available from the Procurement and Disposal Unit: {amend as appropriate}**

Copy of all Financial Bids.



**TABLE 2 – SUMMARY OF DETAILED COMMERCIAL EVALUATION**

Procurement Reference Number					
PD Entity Code	Wrks/Srvcs/Supplies?	Budget Year	Sequence Number	ITB Number	Contract Number

No.	Name of Bidder	Commercial Responsiveness	State reasons for non responsiveness. State any nonmaterial nonconformities, errors and omissions accepted and the way in which they were quantified
		R/NR	
		R/NR	
		R/NR	
		R/NR	
		R/NR	
		R/NR	
		R/NR	

**KEY: R = Responsive NR = Non Responsive** {delete that which is not applicable from the table above}

This examination eliminated [number] bidders, [Names of Bidders].  
 {Attach further details or workings if commercial evaluation is complex}.

**TABLE 3 – SUMMARY OF DETAILED TECHNICAL EVALUATION**

Procurement Reference Number					
PD Entity Code	Wrks/Srvcs/Supplies?	Budget Year	Sequence Number	ITB Number	Contract Number

Evaluation Criteria		Max Score	{Enter Average Scores from each Table 3A}					
{Complete criteria and maximum scores as listed in solicitation document}			Bidder 1	Bidder 2	Bidder 3	Bidder 4	Bidder 5	Bidder 6
<b>A</b>	<b>Main Criteria</b>							
A1	Sub-criteria							
A2								
A3								
A4								
<b>B</b>	<b>Main Criteria</b>							
B1	Sub-criteria							
B2								
B3								
B4								
<b>C</b>	<b>Main Criteria</b>							
C1	Sub-criteria							
C2								
C3								
C4								
<b>D</b>	<b>Main Criteria</b>							
D1	Sub-criteria							
D2								
D3								
D4								
<b>E</b>	<b>Main Criteria</b>							
E1	Sub-criteria							
E2								
E3								
E4								
<b>Totals</b>		<b>100</b>						
<b>Minimum Qualifying Mark</b>			<b>Pass / Fail</b>	<b>Pass / Fail</b>	<b>Pass / Fail</b>	<b>Pass / Fail</b>	<b>Pass / Fail</b>	<b>Pass / Fail</b>

**TABLE 3A – DETAILED TECHNICAL EVALUATION OF BID**

Procurement Reference Number					
PD Entity Code	Wrks/Srvcs/Supplies?	Budget Year	Sequence Number	ITB Number	Contract Number

**BIDDER NAME:** \_\_\_\_\_

Evaluation Criteria		Max Score	<i>{Enter Individual Scores per Evaluator from each Table 3B}</i>					
<i>{Complete criteria and maximum scores as listed in solicitation document}</i>			Evaluator 1	Evaluator 2	Evaluator 3	Evaluator 4	Evaluator 5	Average
<b>A</b>	<b>Main Criteria</b>							
A1	Sub-criteria							
A2								
A3								
A4								
<b>B</b>	<b>Main Criteria</b>							
B1	Sub-criteria							
B2								
B3								
B4								
<b>C</b>	<b>Main Criteria</b>							
C1	Sub-criteria							
C2								
C3								
C4								
<b>D</b>	<b>Main Criteria</b>							
D1	Sub-criteria							
D2								
D3								
D4								
<b>E</b>	<b>Main Criteria</b>							
E1	Sub-criteria							
E2								
E3								
E4								
		<b>Totals</b>						



**TABLE 3B – EVALUATOR’S SCORE SHEET FOR DETAILED TECHNICAL EVALUATION**

Procurement Reference Number					
PD Entity Code	Wrks/Srvcs/Supplies?	Budget Year	Sequence Number	ITB Number	Contract Number

EVALUATOR NAME: \_\_\_\_\_

Evaluation Criteria		Max Score	Procurement Reference Number					
<i>{Complete criteria and maximum scores as listed in solicitation document}</i>			Bidder 1	Bidder 2	Bidder 3	Bidder 4	Bidder 5	Bidder 6
<b>A</b>	<b>Main Criteria</b>							
A1	Sub-criteria							
A2								
A3								
A4								
<b>B</b>	<b>Main Criteria</b>							
B1	Sub-criteria							
B2								
B3								
B4								
<b>C</b>	<b>Main Criteria</b>							
C1	Sub-criteria							
C2								
C3								
C4								
<b>D</b>	<b>Main Criteria</b>							
D1	Sub-criteria							
D2								
D3								
D4								
<b>E</b>	<b>Main Criteria</b>							
E1	Sub-criteria							
E2								
E3								
E4								
<b>Totals</b>		<b>100</b>						

**TABLE 4 – SUMMARY OF FINANCIAL COMPARISON  
(Technical Compliance Selection/ Least Cost Selection)**

PD Entity Code	Wrks/Srvcs/Supplies?	Budget Year	Sequence Number

EVALUATION CURRENCY: \_\_\_\_\_

No	Name of Bidder	Bid Currency	Bid Total	Corrections made	Discounts	Adjustments made	Corrected Amount	Exchange Rate	Converted Total	Margin of Preference	Evaluated total	Rank*

{\*Rank according to Evaluated Total, with the lowest cost as number 1}.

**EVALUATION REPORT FOR NON-CONSULTANCY SERVICES  
(TECHNICAL COMPLIANCE SELECTION)**

Procurement Reference Number					
PD Entity Code	Wrks/Srvcs/Supplies?	Budget Year	Sequence Number	ITB Number	Contract Number

**Guidance Notes for Drafting** *{delete after completing Evaluation Report}*

*This form provides an outline format to assist evaluation committees in drafting evaluation reports for services, using the Technical Compliance Selection methodology. It is suitable for use under any method of procurement. The content should be amended as appropriate.*

*Italic text in {} brackets indicates either a drafting instruction, which should be deleted from the final report or a section included for a possible option, where the whole section should be deleted if not appropriate. Normal text in [] brackets indicates data which should be completed for each individual evaluation.*

**Introduction**

The requirement is for [subject of procurement].

The Procurement method used and approved by the Contracts Committee was [Open Domestic Bidding/Open International Bidding/Restricted Domestic Bidding/Restricted International Bidding/Quotations and Proposals Procurement/Direct Procurement.]

**Details of Invitation**

*{For Open Bidding without pre-qualification}*

The Bidding Document was approved by the Contracts Committee on [date]. The Bid Notice was advertised on the [date] in [name of publications]. The list of bidders purchasing the Bidding Documents was recorded using PP Form 30: Record of Issue of Solicitation Documents (Fee Payable), which is attached as an annex.

*{For Open Bidding with pre-qualification}*

The Invitation to Bid, pre-qualification evaluation and shortlist were approved by the Contracts Committee on [date]. The list of bidders who were issued with the Bidding Documents was recorded using PP Form 31: Record of Issue of Solicitation Documents or Addenda (No Fee Payable), which is attached as an annex.

*{For Restricted Bidding or Quotations and Proposals Procurement}*

The Invitation to Bid/Request for Proposals document (RFP) and shortlist were approved by the Contracts Committee on [date]. The bidders who were issued with the Bidding Documents/RFP was recorded using PP Form 31: Record of Issue of Solicitation Documents or Addenda (No Fee Payable), which is attached as an annex.

*{For Direct Procurement}*

The solicitation document and proposed bidder were approved by the Contracts Committee on [date]. The solicitation document was issued on [date].

**Addenda to Solicitation Document**

*{For addenda}*

[Number] addendum/addenda was/were approved by the Contracts Committee on [date(s)] and issued. The issue of the addendum/addenda was recorded using PP Form 31: Record of Issue of Solicitation Documents or Addenda (No Fee Payable), which is attached as an annex.

*{For no addenda}*

**EVALUATION REPORT FOR NON-CONSULTANCY SERVICES  
(TECHNICAL COMPLIANCE SELECTION)**

Procurement Reference Number					
PD Entity Code	Wrks/Srvcs/Supplies?	Budget Year	Sequence Number	ITB Number	Contract Number

No addenda to the solicitation document were required or issued.

**Pre-Bid Meeting** *{delete if not applicable}*

A pre-bid meeting was held at [location] on [date]. The meeting was recorded using PP Form 33: Record of Pre-Bid Meeting, which is attached as an annex.

**Details of Bid Closing**

*{For Open Bidding, Restricted Bidding and Quotations and Proposals Procurement}*

Bidding was closed on [date] at [time] at [location]. The receipt of bids was recorded using PP Form 34: Receipt of Bids, which is attached as an annex. Sealed Bids were required and received.

*{For Direct Procurement}*

The sealed bid was received on [date].

**Details of Bid Opening**

A Public Bid Opening was held at [location] on [date] at [time]. The Bid Opening and attendance was recorded using PP Form 35, which is attached as an annex.

**Details of Evaluation Committee**

An Evaluation committee was nominated comprising the following officials and approved by the Contracts Committee on [date]:

- [Name]                      [Position and Department]      (Chairperson Evaluation Committee)
- [Name]                      [Position and Department]
- [Name]                      [Position and Department]

**Details of Evaluation Methodology**

The evaluation methodology used was Technical Compliance Selection, which involved the following three stage procedure:

- i. Preliminary examination on a pass/fail basis to determine the eligibility of the bidders and assess their administrative compliance to the Invitation. Non eligible and non compliant bids were eliminated from further evaluation.
- ii. Detailed evaluation to determine the technical and commercial responsiveness of eligible, compliant bids to the terms of reference and terms and conditions in the Invitation. Bids that were not substantially responsive were eliminated from further evaluation.
- iii. Financial comparison to examine and rank financial bids. The lowest price eligible, compliant, substantially responsive Bid was ranked first and declared the best evaluated bid.

**Preliminary Examination**

[Brief narrative on the result of the Preliminary examination and detailed justification with reasons why any Bids were declared non eligible or non compliant.]

See Table 1, which summarises the preliminary examination.

**EVALUATION REPORT FOR NON-CONSULTANCY SERVICES  
(TECHNICAL COMPLIANCE SELECTION)**

Procurement Reference Number					
PD Entity Code	Wrks/Srvcs/Supplies?	Budget Year	Sequence Number	ITB Number	Contract Number

**Detailed Technical and Commercial Evaluation (of the eligible, compliant Bids)**

[Brief narrative on the results of the Detailed Evaluation and detailed justification with reasons why any bids were declared non responsive. Include details of any nonmaterial nonconformities, errors or omissions waived or rectified by the Evaluation committee and the way in which they were quantified for inclusion in the financial comparison. Include details of all clarifications requested and received from bidders. ]

See Tables 2 and 3, which summarise the detailed technical and commercial evaluation.

**Financial Comparison (of eligible, compliant, responsive Bids)**

[Describe the correction of any arithmetic errors, application of any discounts, adjustments made for any nonmaterial nonconformities, errors or omissions, conversion to a common currency and application of any margin of preference.]

All bids that were eligible, compliant and substantially responsive were ranked, with the lowest priced being ranked number 1.

See Table 4, which summarises the financial comparison.

**Recommendations** *{amend as appropriate}*

On the basis of the evaluation methodology and criteria stated in the Invitation, it is recommended that-

- (1) the best evaluated bid for the procurement of [subject of procurement] is from [Name of Bidder] with a total evaluated price of [currency and amount].
- (2) negotiations are/are not required.
- (3) a post-qualification is/is not required.
- (4) the total proposed contract price is [currency and amount].
- (5) the total acquisition cost for the requirement is estimated to be [currency and amount], including [state all incidental costs included in the estimate].

**Disagreement by the Evaluation Committee** *{delete if not applicable}*

The Evaluation committee could not reach a unanimous decision on the evaluation and this evaluation report details the view of the majority of the team.

[Give details of the issues where the team disagreed, the discussions held, the alternative views and the names of those with alternative views].

**Signed by the Evaluation Committee:**

I confirm that this Evaluation Report gives a complete and accurate report of the evaluation conducted:

Name: \_\_\_\_\_ Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Name: \_\_\_\_\_ Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Name: \_\_\_\_\_ Signature: \_\_\_\_\_ Date: \_\_\_\_\_

**EVALUATION REPORT FOR NON-CONSULTANCY SERVICES  
(TECHNICAL COMPLIANCE SELECTION)**

Procurement Reference Number					
PD Entity Code	Wrks/Srvcs/Supplies?	Budget Year	Sequence Number	ITB Number	Contract Number

**Annexes: {amend as appropriate}**

PP Form 30: Record of Issue of Solicitation Documents (Fee Payable)

PP Form 31: Record of Issue of Solicitation Documents or Addenda (No Fee Payable)

PP Form 33: Record of Pre-Bid Meeting

PP Form 34: Record of Receipt of Bids

PP Form 35: Record of Bid Opening

Table 1: Preliminary Examination and Assessment of Eligibility

Table 2: Summary of Detailed Commercial Evaluation

Table 3: Summary of Detailed Technical Evaluation

Table 4: Summary of Financial Comparison

**Documents available from the Procurement and Disposal Unit: {amend as appropriate}**

Copy of the solicitation document.

Copy of all Bids.

**TABLE 1 – PRELIMINARY EXAMINATION AND ASSESSMENT OF ELIGIBILITY**

Procurement Reference Number					
PD Entity Code	Wrks/Srvcs/Supplies?	Budget Year	Sequence Number	ITB Number	Contract Number

	1	2	3	4	5	6
<b>Name of Bidder</b>						
<b>Eligibility criteria</b>						
<i>{Complete criteria as per solicitation document}</i>	C/NC	C/NC	C/NC	C/NC	C/NC	C/NC
	C/NC	C/NC	C/NC	C/NC	C/NC	C/NC
	C/NC	C/NC	C/NC	C/NC	C/NC	C/NC
	C/NC	C/NC	C/NC	C/NC	C/NC	C/NC
	C/NC	C/NC	C/NC	C/NC	C/NC	C/NC
	C/NC	C/NC	C/NC	C/NC	C/NC	C/NC
	C/NC	C/NC	C/NC	C/NC	C/NC	C/NC
	C/NC	C/NC	C/NC	C/NC	C/NC	C/NC
	C/NC	C/NC	C/NC	C/NC	C/NC	C/NC
<b>Administrative Compliance Criteria</b>						
<i>{Complete criteria as per solicitation document}</i>	C/NC	C/NC	C/NC	C/NC	C/NC	C/NC
	C/NC	C/NC	C/NC	C/NC	C/NC	C/NC
	C/NC	C/NC	C/NC	C/NC	C/NC	C/NC
	C/NC	C/NC	C/NC	C/NC	C/NC	C/NC
	C/NC	C/NC	C/NC	C/NC	C/NC	C/NC
	C/NC	C/NC	C/NC	C/NC	C/NC	C/NC
	C/NC	C/NC	C/NC	C/NC	C/NC	C/NC
	C/NC	C/NC	C/NC	C/NC	C/NC	C/NC
	C/NC	C/NC	C/NC	C/NC	C/NC	C/NC
<b>Conclusion</b>	<b>C/NC</b>	<b>C/NC</b>	<b>C/NC</b>	<b>C/NC</b>	<b>C/NC</b>	<b>C/NC</b>

**KEY: C = Compliant NC = Non Compliant** *{delete that which is not applicable from the table above}*

This preliminary examination eliminated [number] bidders, [Names of Bidders].

**TABLE 2 – SUMMARY OF COMMERCIAL EVALUATION**

(ONLY BIDS THAT ARE ELIGIBLE AND COMPLIANT)

Procurement Reference Number					
PD Entity Code	Wrks/Srvcs/Supplies?	Budget Year	Sequence Number	ITB Number	Contract Number

No.	Name of Bidder	Commercial Responsiveness	State reasons for non responsiveness. State any nonmaterial nonconformities, errors and omissions accepted and the way in which they were quantified
		R/NR	
		R/NR	
		R/NR	
		R/NR	
		R/NR	
		R/NR	
		R/NR	

**KEY: R = Responsive NR = Non Responsive** {delete that which is not applicable from the table above}

This examination eliminated [number] bidders, [Names of Bidders].  
 {Attach further details or workings if commercial evaluation is complex}.



**TABLE 3 – SUMMARY OF TECHNICAL EVALUATION**

(ONLY BIDS THAT ARE ELIGIBLE AND COMPLIANT)

Procurement Reference Number					
PD Entity Code	Wrks/Srvcs/Supplies?	Budget Year	Sequence Number	ITB Number	Contract Number

No.	Name of Bidder	Technical Responsiveness	State reasons for non responsiveness. State any nonmaterial nonconformities, errors and omissions accepted and the way in which they were quantified
		R/NR	
		R/NR	
		R/NR	
		R/NR	
		R/NR	
		R/NR	
		R/NR	

**KEY: R = Responsive NR = Non Responsive** {delete that which is not applicable from the table above}

This examination eliminated [number] bidders, [Names of bidders].

{Attach detailed assessment of conformance to the terms of reference for each Bid if technical evaluation is complex}.

**TABLE 4 – SUMMARY OF FINANCIAL COMPARISON (Non-Consultancy Services)**  
 (ONLY BIDS THAT ARE ELIGIBLE, COMPLIANT AND SUBSTANTIALLY RESPONSIVE)

PD Entity Code	Wrks/Srvcs/Supplies?	Budget Year	Sequence Number

EVALUATION CURRENCY: \_\_\_\_\_

No	Name of Bidder	Bid Currency	Bid Total	Corrections made	Discounts	Adjustments made	Corrected Amount	Exchange Rate	Converted Total	Margin of Preference	Evaluated total	Rank

{This table may be replaced with a spreadsheet with automatic calculations. Attach working spreadsheets for complex calculations}.

**SUBMISSION TO CONTRACTS COMMITTEE: .....**

**REQUEST FOR APPROVAL OF EVALUATION REPORT AND RECOMMENDATIONS**

PD Entity Code	Wrks/Srvcs/Supplies?	Budget Year	Sequence Number

Subject of Procurement:		International / Domestic
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SUBMISSION INFORMATION		
D1	Type of evaluation Report (Technical/Financial/Combined)	
D2	Are negotiations required? (Yes/No) If yes, attach details using LG PP Form 14. If technical evaluation only, state not applicable	
D3	Is post-qualification required? (Yes/No) If technical evaluation only, state not applicable	
D4	Any other relevant information	

**Documents Attached:** *(list any other documents attached or delete if not applicable)*

1. LG PP Form 12 : Evaluation Report for Supplies, Works or Services
2. LG PP Form 14: Negotiations Plan *(if applicable)*
3. LG PP Form 6: Proposed Negotiation Team *(if applicable)*

**Related Documents Submitted Previously:** *(available for reference from Secretary to Contracts Committee or Head of Procurement and Disposal Unit)*

1. Bidding Document and all Addenda

<b>Previous Submission:</b> <i>(Section letter and title)</i>		<b>Date Approved:</b>	
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The information contained in this form and the attached documents is complete, true and accurate and in accordance with the Local Government (Public Procurement and Disposal of Public Assets) Regulation, 2006:

Signature: \_\_\_\_\_ Name: \_\_\_\_\_

Position: \_\_\_\_\_ Date: \_\_\_\_\_  
*Responsible Officer (DD/MM/YY)*

**NEGOTIATIONS PLAN**

PD Entity Name and Code	Wrks/Srvcs/Supplies?	Budget Year	Sequence Number

Subject of Procurement:	
-------------------------	--

Name of Provider:	
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ISSUE	OBJECTIVES	NEGOTIATION PARAMETERS

Proposed Negotiations prepared by:

Signature: \_\_\_\_\_ Name: \_\_\_\_\_ Position: \_\_\_\_\_ Date: \_\_\_\_\_

*The negotiations plan must be approved by the Contracts Committee prior to negotiations being held. The Negotiation Team must also be approved using LG Form 11.*

**RECORD OF NEGOTIATIONS**

PD Entity Name and Code	Wrks/Srvcs/Supplies?	Budget Year	Sequence Number

Subject of Procurement:	
-------------------------	--

<b>PART 1: Record of Negotiations</b>	
<b>ISSUE</b>	<b>AGREEMENT (WITH FULL DETAILS)</b>

I hereby certify that the above is a true and accurate record of the negotiations:

Signature: \_\_\_\_\_ Name: \_\_\_\_\_ Position: \_\_\_\_\_ Date: \_\_\_\_\_  
*For the Procuring and Disposing Entity*

Signature: \_\_\_\_\_ Name: \_\_\_\_\_ Position: \_\_\_\_\_ Date: \_\_\_\_\_  
*For the Provider*

Insert Name of Procuring and Disposing Entity

### RECORD OF NEGOTIATIONS

PD Entity Name and Code	Wrks/Srvcs/Supplies?	Budget Year	Sequence Number

#### PART 2: Record of Attendance at Negotiations

No	Name	Position and Department	Representing <i>(Procuring and Disposing Entity / Provider)</i>	Signature

**RECORD OF NEGOTIATIONS**

PD Entity Name and Code	Wrks/Srvcs/Supplies?	Budget Year	Sequence Number

**PART 3: Recommendations to the Contracts Committee**

The recommendation of the Negotiation Team in relation to the negotiations detailed in Part 1 is:

**POST-QUALIFICATION EVALUATION REPORT**

PD Entity Name and Code	Wrks/Srvcs/Supplies?	Budget Year	Sequence Number

**Introduction**

The requirement is for [subject of procurement].

The Procurement method used and approved by the Contracts Committee was [Open Domestic Bidding/Open International Bidding/Restricted Domestic Bidding/Restricted International Bidding/Quotations or Proposals Procurement/Direct Procurement.]

**Details of Evaluation**

The Evaluation Report recommended [name of best evaluated bidder] as the best evaluated bidder and recommended that a post-qualification be undertaken prior to award of contract. Evaluation Report was approved by the Contracts Committee on [date].

**Details of Evaluation Committee**

The Evaluation committee, which was approved by the Contracts Committee on [date] consisted of:

- [Name]                      [Position and Department]      (Chairperson Evaluation Committee)
- [Name]                      [Position and Department]
- [Name]                      [Position and Department]
- [Name]                      [Position and Department]

**Details of Post-qualification Evaluation**

[Name of bidder] was evaluated against the qualification criteria stated in the solicitation document.

[Brief narrative on the result of the post-qualification evaluation and detailed justification with reasons if the bidder was found not qualified against any criteria.]

On the basis of the qualification criteria stated, [name of bidder] is qualified/not qualified {delete as applicable}.

See the attached table, which summarises the post-qualification evaluation.

**Recommendation {delete/amend as required}**

*{Where the bidder is qualified}*

It is recommended that the contract be awarded to [name of bidder] for a total contract value of [currency and amount], subject to any negotiations required.

*{Where the bidder is not qualified}*

It is recommended that the bid from [name of bidder] be rejected and a post-qualification undertaken on the second best evaluated bidder.

**Disagreement by the Evaluation Committee {delete if not applicable}**

The Evaluation committee could not reach a unanimous decision on the post-qualification and this report details the view of the majority of the team.

[Give details of the issues where the team disagreed, the discussions held, the alternative views and the names of those with alternative views].

**Signed by the Evaluation Committee:**



**POST-QUALIFICATION EVALUATION REPORT**

PD Entity Name and Code	Wrks/Srvcs/Supplies?	Budget Year	Sequence Number

I confirm that this Post-qualification Report gives a complete and accurate report of the post-qualification conducted:

Name: \_\_\_\_\_ Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Name: \_\_\_\_\_ Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Name: \_\_\_\_\_ Signature: \_\_\_\_\_ Date: \_\_\_\_\_

**Annexes: {amend as appropriate}**

Summary of Post-qualification Evaluation

**Documents available from the Procurement and Disposal Unit: {amend as appropriate}**

Copy of the solicitation document.

Copy of the bid.

Copy of the approved PP Form 41/42/43/44/45/46/47/48: Evaluation Report.

**SUMMARY OF POST-QUALIFICATION EVALUATION**

PD Entity Code	Wrks/Srvcs/Supplies?	Budget Year	Sequence Number

Subject of Procurement:	
Name of Bidder:	

Qualification Criteria	Qualified / Not Qualified?	Comments
<i>{List all criteria in accordance with the solicitation document. Criteria shown are examples only}.</i>		
Experience/performance on similar contracts in the country/region/internationally	Q/NQ	
Equipment and manufacturing/construction facilities	Q/NQ	
Qualifications and experience of personnel	Q/NQ	
Financial capability to perform the contract	Q/NQ	
Local facilities or representation	Q/NQ	
Available capacity	Q/NQ	
Litigation record	Q/NQ	

As a result of this post-qualification evaluation, the bidder named above is declared to be qualified/ not qualified *{delete that which is not applicable}*.

Signature: \_\_\_\_\_ Name: \_\_\_\_\_ Position: \_\_\_\_\_ Date: \_\_\_\_\_  
*On behalf of the Evaluation Committee*

**SUBMISSION TO CONTRACTS COMMITTEE: .....**

**REQUEST FOR APPROVAL OF CONTRACT AWARD RECOMMENDATION**

PD Entity Code	Wrks/Srvcs/Supplies?	Budget Year	Sequence Number

Subject of Procurement:		International / Domestic
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SUBMISSION INFORMATION		
E1	Were negotiations held? (Yes/No) If yes, attach PP Form 51 Record of Negotiations	
E2	Was a post-qualification undertaken? (Yes/No) If yes, attach details	
E3	Bidder recommended for contract award	
E4	Currency and total amount of recommended contract award	
E5	State earliest date for release of any Letter of Bid Acceptance	
E6	Any other relevant information	

**Documents Attached:** *(list any other documents attached or delete if not applicable)*

1. LG PP Form 9: Record of Negotiations *(if applicable)*
2. LG PP Form 10: Post-qualification report *(if applicable)*
3. Draft Notice of Best Evaluated Bidder *(if applicable)*
4. Draft Letter of Bid Acceptance *(if applicable)*

**Related Documents Submitted Previously:** *(available for reference from Secretary to Contracts Committee or Head of Procurement and Disposal Unit)*

1. Approved Evaluation Report(s)

<b>Previous Submission:</b> <i>(Section letter and title)</i>		<b>Date Approved:</b>	
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The information contained in this form and the attached documents is complete, true and accurate and in accordance with the Local Government (Public Procurement and Disposal of Public Assets) Regulations, 2006 and funds are available for this contract:

Signature: \_\_\_\_\_ Name: \_\_\_\_\_

Position: \_\_\_\_\_ Date: \_\_\_\_\_

*Responsible Officer*

*(DD/MM/YY)*

**SUBMISSION TO CONTRACTS COMMITTEE: .....**

**REQUEST FOR APPROVAL OF CONTRACT DOCUMENT**

PD Entity Code	Wrks/Srvcs/Supplies?	Budget Year	Sequence Number

Subject of Procurement:		International / Domestic
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SUBMISSION INFORMATION	
F1	<p>Has a Letter of Bid Acceptance been approved/issued?                      If yes, state date issued or earliest date for release                      If no, state earliest date for release of contract</p>
F2	<p>Any other relevant information</p>

**Documents Attached:** *(list any other documents attached)*

- Draft Contract

<b>Previous Submission:</b> <i>(Section letter and title)</i>		<b>Date Approved:</b>	
--	--	-----------------------	--

The information contained in this form and the attached documents is complete, true and accurate and in accordance with the Local Government (Public Procurement and Disposal of Public Assets) Regulations 2006 and funds are available for this contract:

Signature: \_\_\_\_\_ Name: \_\_\_\_\_

Position: \_\_\_\_\_ Date: \_\_\_\_\_

*Responsible Officer*

*(DD/MM/YY)*

**SUBMISSION TO CONTRACTS COMMITTEE: .....**

**REQUEST FOR APPROVAL OF CONTRACT AMENDMENT**

PD Entity Code	Wrks/Srvcs/Supplies?	Budget Year	Sequence Number

Subject of Procurement:		International / Domestic
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SUBMISSION INFORMATION		
F1-1	How many times (if any) has the contract been amended previously?	
F1-2	Original contract value Total value of any previous amendments (+/- currency and amount, percentage of original contract value)	
F1-3	Describe proposed amendment to contract	
F1-4	Reason for amendment of contract	
F1-5	Value of proposed contract amendment (+/- currency and amount, percentage of original contract value)	
F1-6	Any other relevant information	

**Documents Attached:** *(list any other documents attached)*

1. Draft Contract Amendment

**Related Documents Submitted Previously:** *(available for reference from Secretary to Contracts Committee or Head of Procurement and Disposal Unit)*

1. Contract Document and all previous amendments

<b>Previous Submission:</b> <i>(Section letter and title)</i>		<b>Date Approved:</b>	
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The information contained in this form and the attached documents is complete, true and accurate and in accordance with the Local Government (Public Procurement and Disposal of Public Assets) Regulations, 2006 and funds are available for this contract amendment:

Signature: \_\_\_\_\_ Name: \_\_\_\_\_

Position: \_\_\_\_\_ Date: \_\_\_\_\_

*Responsible Officer*

*(DD/MM/YY)*

**CONTRACTS COMMITTEE DECISION ON A SUBMISSION**

PD Entity Code	Wrks/Srvcs/Supplies?	Budget Year	Sequence Number

Addressed to:

Name: \_\_\_\_\_ Position: \_\_\_\_\_

<b>SUBMISSION INFORMATION</b>	
Subject of Procurement or Disposal	
Submission made (Section Letter and Title of Submission Form)	
Date/reference of Contracts Committee Meeting	

<b>CONTRACTS COMMITTEE DECISION</b>
<p><b>Approval / Rejection</b> of Submission to Contracts Committee <i>(delete as applicable)</i></p> <p><i>List all conditions to any approval; list all reasons for any rejection.</i></p> <p><i>For Contract Awards, Documents and Amendments, state name of successful bidder/provider and total of contract award or amendment (currency, amount, including/excluding VAT and increase/decrease if applicable).</i></p>           <p>All contract documents, Letters of Bid Acceptance and contract amendments must be signed by the Accounting Officer or an official authorised by the Accounting Officer to sign. For procurement requirements, any request to sign submitted to the Accounting Officer must state the earliest date on which the document may be issued, allowing sufficient time for publication of a Notice of Best Evaluated Bidder, where required.</p> <p>For procurement requirements, funds must be committed <b>before</b> the issue of any such document.</p> <p>Where required, clearance must be obtained from the Solicitor General <b>before</b> the issue of any document.</p>

Signature: \_\_\_\_\_ Name: \_\_\_\_\_

Position: \_\_\_\_\_ Date: \_\_\_\_\_

(DD/MM/YY)

# **DISPOSAL FORMS**

**DISPOSAL REQUISITION**

PD Entity Name and Code	Budget Year	Sequence Number

<b>Subject of Disposal:</b>		<b>Location/Site of Asset:</b>	
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Item No.	Description of Asset <i>(A detailed list or report of a Board of Survey may be attached)</i>	Reference Number from Asset Register	Estimated Value
			<b>Currency: _____</b>
			<b>Estimated Total Value:</b>

Signatures are required below to certify that (1) the asset described above needs to be disposed of and that (2) approval is granted to proceed with the disposal.

**(1) Confirmation of Need**  
(Originating Officer)

**(2) Approval to Dispose of Asset**  
(Accounting Officer)

Signature:

\_\_\_\_\_

\_\_\_\_\_

Name:

\_\_\_\_\_

\_\_\_\_\_

Position:

\_\_\_\_\_

\_\_\_\_\_

Date:

\_\_\_\_\_

\_\_\_\_\_



**SUBMISSION TO CONTRACTS COMMITTEE: ..... (insert method)**

**REQUEST FOR APPROVAL OF DISPOSAL METHOD**

PD Entity Name and Code	Budget Year	Sequence Number

Subject of Disposal:		International / Domestic
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SUBMISSION INFORMATION		
A1	State all valuations or estimate of value (currency and amount) and sources of valuations or estimate Identify all officials involved in obtaining valuations (Names and Positions)	
A2	Proposed Reserve Price(s)	
A3	Reasons for use of this disposal method	
A4	State name of Auctioneer/ Third Party Disposal Provider If yes, give details (name, precise role, contract arrangements, costs)	
A5	Subject to common disposal? (Yes/No) If yes, give details	
A6	Any other relevant information	

**Documents Attached:** (list any other documents)

1. LG DPA Form 1: Disposal Requisition

The information contained in this form and the attached documents is complete, true and accurate and in accordance with the Local Government (Public Procurement and Disposal of Public Assets) Regulations Act, 2006:

Signature: \_\_\_\_\_ Name: \_\_\_\_\_

Position: \_\_\_\_\_ Date: \_\_\_\_\_

*Responsible Officer*

*(DD/MM/YY)*

**SUBMISSION TO CONTRACTS COMMITTEE: .....**  
**REQUEST FOR APPROVAL OF BIDDING DOCUMENT AND BID NOTICE**

PD Entity Code	Budget Year	Sequence Number

Subject of Disposal:		International / Domestic
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SUBMISSION INFORMATION		
B1	Identify all officials (or consultants) involved in preparation of bidding document (Names and Positions)	
B2	Will evaluation be based on (1) price only or (2) price and other factors? State reason for selection of evaluation methodology	
B3	Name of proposed bidder and reason for selection	
B4	Identify all officials (or providers) involved in choice of bidder (Names and Positions)	
B5	State arrangements for inspection of assets	
B6	Proposed date and publications for bid notice	
B7	Proposed date of release of bidding document	
B8	Is bidding document to be sold (Yes/No) If yes, state proposed cost	
B9	Any other relevant information	

**Documents Attached:** *(list any other documents)*

1. Draft Invitation to Bid Notice
2. Draft Bidding Document
3. LG DPA Form 8: Proposed Evaluation Team

<b>Previous Submission:</b> <i>(Section letter and title)</i>		<b>Date Approved:</b>	
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The information contained in this form and the attached documents is complete, true and accurate and in accordance with the Local Government (Public Procurement and Disposal of Public Assets) Regulation, 2006:

Signature: \_\_\_\_\_ Name: \_\_\_\_\_

Position: \_\_\_\_\_ Date: \_\_\_\_\_

*Responsible Officer*

*(DD/MM/YY)*

Insert Name of Procuring and Disposing Entity

**RECORD OF ISSUE OF SOLICITATION DOCUMENTS/ ADDENDA**

**(FEE/ NON-FEE PAYABLE)**

PD Entity Name and Code	Budget Year	Sequence Number

Subject of Disposal:	
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Date Notice Published:		Date Document Available:		Cost of Documents:	
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No	Name & Address of Potential Bidder	Request Received (date)	Fee Paid (date)	Documents Issued (date)	Signature of Officer Issuing Document

*Signed receipts from bidders or other confirmation of receipt of documents should be attached.*

I hereby certify that the above is a true and accurate record of the issue of solicitation documents:

Signature: \_\_\_\_\_ Name: \_\_\_\_\_ Position: \_\_\_\_\_ Date: \_\_\_\_\_

**RECORD OF BID CLOSING/ RECEIPT OF BIDS**

PD Entity Name and Code	Budget Year	Sequence Number

Subject of Disposal:		Method of Bid Receipt: Receipt in Person / Bid Box*
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Deadline for Submission (date and time):		Location for Submission:	
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No	Name of Bidder	Date of Receipt	Time of Receipt	No of Envelopes	Comments

The bids detailed above were received before the date and time of the deadline / The bid box was sealed at the date and time of the deadline (*delete as applicable*)\*. No further bids were received after the deadline.

Signature: \_\_\_\_\_ Name: \_\_\_\_\_ Position: \_\_\_\_\_ Date: \_\_\_\_\_

Signature: \_\_\_\_\_ Name: \_\_\_\_\_ Position: \_\_\_\_\_ Date: \_\_\_\_\_

*To be signed by the member of the Procurement and Disposal Unit managing the bid closing and a representative from the Contracts Committee witnessing.*

*\* Bid details do not need to be recorded when a bid box is used, but may be registered using this form prior to placement in the bid box, if appropriate.*

**RECORD OF BID OPENING**

PD Entity Name and Code	Budget Year	Sequence Number

Subject of Disposal:	
----------------------	--

Location of Bid Opening:		Date and Time of Bid Opening:	
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<b>PART 1: Record of Bids Opened and Details Read Out</b>			
No	Name of Bidder	Currency and Price as read out	Remarks

All bids received on time in response to the solicitation document were opened, read out and recorded:

Signature: \_\_\_\_\_ Name: \_\_\_\_\_ Position: \_\_\_\_\_ Date: \_\_\_\_\_

Signature: \_\_\_\_\_ Name: \_\_\_\_\_ Position: \_\_\_\_\_ Date: \_\_\_\_\_

*To be signed by the member of the Procurement and Disposal Unit managing the bid opening and a representative from the Contracts Committee witnessing.*

*Insert Name of Procuring and Disposing Entity*

**RECORD OF BID OPENING**

PD Entity Name and Code	Budget Year	Sequence Number

<b>PART 2: Record of Attendance</b>				
<i>To be signed by all staff and bidders present at Bid Opening</i>				
<b>No</b>	<b>Name</b>	<b>Position</b>	<b>Company or Department</b>	<b>Signature</b>

Insert Name of Procuring and Disposing Entity

**MEMBERSHIP OF EVALUATION COMMITTEE/ NEGOTIATION TEAM**

PD Entity Name and Code	Budget Year	Sequence Number

Subject of Disposal:		Evaluation / Negotiation Team ( <i>delete as applicable</i> )
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Method of Disposal:		Estimated Value:	
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No	Name of Member	Position	Department	Reason for Selection <i>e.g. disposal knowledge, technical expertise, representative of user dept etc</i>

The evaluation committee/negotiation team was proposed by:

Signature: \_\_\_\_\_ Name: \_\_\_\_\_ Position: \_\_\_\_\_ Date: \_\_\_\_\_

**DISPOSAL EVALUATION REPORT**  
(EVALUATION BASED ON PRICE ONLY)

PD Entity Name and Code	Budget Year	Sequence Number

**Guidance Notes for Drafting** *{delete after completing Evaluation Report}*

*This form provides an outline format to assist evaluation committees in drafting evaluation reports for disposal where the evaluation is based on price only. The content should be amended as appropriate.*

*Italic text in {} brackets indicates either a drafting instruction, which should be deleted from the final report or a section included for a possible option, where the whole section should be deleted if not appropriate.*

*Normal text in [] brackets indicates data which should be completed for each individual evaluation.*

**Introduction**

The asset(s) being disposed of is/are [description of asset and number in asset register].

The Disposal method used and approved by the Contracts Committee was [Public Bidding/Direct Negotiations/Sale to Public Officials.]

**Details of Invitation**

*{For Public Bidding}*

The Bidding Document was approved by the Contracts Committee on [date]. The Bid Notice was advertised on the [date] in [name of publications]. The list of Companies requesting the Bidding Documents was recorded using DPA Form 130/131: Record of Issue of Solicitation Documents, which is attached as an annex.

*{For Sale to Public Officials}*

The Bidding Document was approved by the Contracts Committee on [date]. The Bid Notice was advertised on the [date] in [locations of notices]. The list of staff requesting the Bidding Documents was recorded using DPA Form 131: Record of Issue of Solicitation Documents, which is attached as an annex.

*{For Direct Negotiation}*

The solicitation document and proposed bidder were approved by the Contracts Committee on [date]. The solicitation document was issued on [date].

**Inspection of Assets**

Potential bidders were given the opportunity to inspect the assets at [location] on [date(s)].

**Details of Bid Closing**

*{For Public Bidding and Sale to Public Officials}*

Bidding was closed on [date] at [time] at [location]. The receipt of bids was recorded using DPA Form 134: Receipt of Bids, which is attached as an annex. Sealed Bids were required and received.

*{For Direct Negotiation}*

The sealed bid was received on [date].

**Details of Bid Opening**

A Public Bid Opening was held at [location] on [date] at [time]. The Bid Opening and attendance was recorded using DPA Form 135, which is attached as an annex.



**DISPOSAL EVALUATION REPORT**  
(EVALUATION BASED ON PRICE ONLY)

PD Entity Name and Code	Budget Year	Sequence Number

**Details of Evaluation Committee**

An evaluation committee was nominated comprising the following officials and approved by the Contracts Committee on [date]:

- [Name]                      [Position and Department]      (Chairperson Evaluation Committee)
- [Name]                      [Position and Department]
- [Name]                      [Position and Department]

**Details of Evaluation**

The evaluation was based on price only.

[Describe any errors in calculation and corrections made and the conversion to a common currency if necessary.]

See Table 1, which summarises the bid prices.

The highest bid received was [price of highest bid].

The official valuation/reserve price was [valuation or reserve price, if any].

*{For Disposal by Sale to Public Officials only}*

The previous purchases of the best evaluated bidder were checked on the Authority’s register and it was determined that the bidder was not purchasing for business or commercial use.

*{or}* The previous purchases of the best evaluated bidder were checked on the Authority’s register and it was determined that the bidder was purchasing for business or commercial use. [Give details of why this conclusion was reached.] The same check was therefore made on the next best evaluated bidder and it was determined that he/she was not purchasing for business or commercial use.

**Recommendation** *{amend as appropriate}*

*{Where the highest bid is equal to or higher than the valuation or reserve price, if any}*

On the basis of evaluation based on price only, it is recommended that the award be made to [Name of Bidder] for a total contract value of [currency and amount] for [list all items that the award relates to].

*{Repeat recommendation for multiple contracts.}*

*{Where the highest bid is lower than the valuation or reserve price}*

The best evaluated bid is less than the valuation/reserve price and it is therefore recommended that no contract award be made. It is further recommended that the asset(s) be revalued/disposed of by [method of disposal].

*{or}* The highest bid received is only [state percentage] % below the valuation/reserve price and it is therefore recommended that negotiations be held with [Name of Bidder] in relation to the bid price.

*{or}* The highest bid received is only [state percentage] % below the valuation/reserve price and it is therefore recommended that the award be made to [Name of Bidder] for a total contract value of [currency and amount] for [list all items that the award relates to].

*{or}* [State other appropriate recommendation.]

**DISPOSAL EVALUATION REPORT**  
**(EVALUATION BASED ON PRICE ONLY)**

PD Entity Name and Code	Budget Year	Sequence Number

**Disagreement by the Evaluation Committee** *{delete if not applicable}*

The Evaluation Committee could not reach a unanimous decision on the evaluation and this evaluation report details the view of the majority of the team.

[Give details of the issues where the team disagreed, the discussions held, the alternative views and the names of those with alternative views].

**Signed by the Evaluation Committee:**

I confirm that this Evaluation Report gives a complete and accurate report of the evaluation conducted:

Name: \_\_\_\_\_ Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Name: \_\_\_\_\_ Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Name: \_\_\_\_\_ Signature: \_\_\_\_\_ Date: \_\_\_\_\_

**Annexes: {amend as appropriate}**

DPA Form 130/131: Record of Issue of Solicitation Documents or Addenda

DPA Form 134: Record of Receipt of Bids

DPA Form 135: Record of Bid Opening

Table 1: Summary of Bid Prices

**Documents available from the Procurement and Disposal Unit: {amend as appropriate}**

Copy of the solicitation document.

Copy of all Bids.

**TABLE 1 – SUMMARY OF EVALUATION**

PD Entity Code	Budget Year	Sequence Number

**ITEM/LOT NUMBER:** \_\_\_\_\_

**EVALUATION CURRENCY:** \_\_\_\_\_

**ASSET REGISTER NUMBER:** \_\_\_\_\_

**VALUATION/RESERVE PRICE:** \_\_\_\_\_

No	Name of Bidder	Bid Currency	Bid Total (Read Out)	Corrections made	Corrected Amount	Exchange Rate	Evaluated Total	Rank

*{The highest price should be ranked as number 1. Attach a separate table for each item or lot}.*

**DISPOSAL EVALUATION REPORT**  
(EVALUATION BASED ON PRICE AND OTHER FACTORS)

PD Entity Name and Code	Budget Year	Sequence Number

**Guidance Notes for Drafting** *{delete after completing Evaluation Report}*

*This form provides an outline format to assist evaluation committees in drafting evaluation reports for disposal where the evaluation is based on price and other factors. The content should be amended as appropriate.*

*Italic text in {} brackets indicates either a drafting instruction, which should be deleted from the final report or a section included for a possible option, where the whole section should be deleted if not appropriate. Normal text in [] brackets indicates data which should be completed for each individual evaluation.*

**Introduction**

The asset(s) being disposed of is/are [description of asset and number in asset register].

The Disposal method used and approved by the Contracts Committee was [Public Bidding/Direct Negotiation/Sale to Public Officials.]

**Details of Invitation**

*{For Public Bidding}*

The Bidding Document was approved by the Contracts Committee on [date]. The Bid Notice was advertised on the [date] in [name of publications]. The list of Bidders requesting the Bidding Documents was recorded using DPA Form 130/131: Record of Issue of Solicitation Documents, which is attached as an annex.

*{For Sale to Public Officials}*

The Bidding Document was approved by the Contracts Committee on [date]. The Bid Notice was advertised on the [date] in [location of notices]. The list of staff requesting the Bidding Documents was recorded using DPA Form 131: Record of Issue of Solicitation Documents, which is attached as an annex.

*{For Direct Negotiation}*

The solicitation document and proposed bidder were approved by the Contracts Committee on [date]. The solicitation document was issued on [date].

**Inspection of Assets**

Potential bidders were given the opportunity to inspect the assets at [location] on [date(s)].

**Details of Bid Closing**

*{For Public Bidding and Sale to Public Officials}*

Bidding was closed on [date] at [time] at [location]. The receipt of bids was recorded using DPA Form 134: Receipt of Bids, which is attached as an annex. Sealed Bids were required and received.

*{For Direct Negotiation}*

The sealed bid was received on [date].

**Details of Bid Opening**

A Public Bid Opening was held at [location] on [date] at [time]. The Bid Opening and attendance was recorded using DPA Form 135, which is attached as an annex.

**DISPOSAL EVALUATION REPORT**  
(EVALUATION BASED ON PRICE AND OTHER FACTORS)

PD Entity Name and Code	Budget Year	Sequence Number

**Details of Evaluation Committee**

An evaluation committee was nominated comprising the following officials and approved by the Contracts Committee on [date]:

- [Name]                      [Position and Department]      (Chairperson Evaluation Committee)
- [Name]                      [Position and Department]
- [Name]                      [Position and Department]

**Details of Evaluation Methodology**

The evaluation was based on price and other factors, using the following three stage methodology. *{amend as appropriate}*.

- i. Preliminary examination on a pass/fail basis to determine the eligibility of the bidders. Non eligible bidders were eliminated from further evaluation.
- ii. Application of other evaluation criteria in the manner stated in the solicitation document. Technically non compliant bids were eliminated from further evaluation/Bids were awarded scores according to merit.
- iii. Financial evaluation to correct any errors in calculations, convert to a common evaluation currency and rank the bids according to price or score. Bids were compared to the official valuation/reserve price.

**Preliminary Examination**

[Brief narrative on the result of the Preliminary examination and detailed justification with reasons why any Bidders were declared not eligible.]

See Table 1, which summarises the preliminary examination.

**Other Evaluation Criteria (if any)**

[Brief narrative on the application of any other evaluation criteria and detailed justification with reasons why any bids were declared non compliant or for the scores awarded.]

See Table 2, which summarises the technical evaluation.

**Financial Evaluation**

[Describe any errors in calculation and corrections made and the conversion to a common currency if necessary.]

[Describe the ranking of bids according to price or scores].

See Table 3, which summarises the price evaluation.

The best evaluated bid was [name of bidder] at a total bid price of [price of bid].

The official valuation/reserve price was [valuation or reserve price, if any].

**Disagreement by the Evaluation Committee *{delete if not applicable}***

The evaluation committee could not reach a unanimous decision on the evaluation and this evaluation report details the view of the majority of the team.

**DISPOSAL EVALUATION REPORT**  
**(EVALUATION BASED ON PRICE AND OTHER FACTORS)**

PD Entity Name and Code	Budget Year	Sequence Number

[Give details of the issues where the team disagreed, the discussions held, the alternative views and the names of those with alternative views].

**Recommendation** *{amend as appropriate}*

*{Where the highest bid is equal to or higher than the valuation or reserve price, if any}*

It is recommended that the award be made to [Name of Bidder] for a total contract value of [currency and amount] for [list all items that the award relates to].

*{or}* It is recommended that the award be made to [Name of Bidder], subject to negotiations on [Areas for Negotiations].

*{Repeat recommendation for multiple contracts.}*

*{Where the highest bid is lower than the valuation or reserve price}*

The best evaluated bid is less than the valuation/reserve price and it is therefore recommended that no contract award be made. It is further recommended that the asset(s) be revalued/disposed of by [method of disposal].

*{or}* The best evaluated bid is only [state percentage] % below the valuation/reserve price and it is therefore recommended that negotiations be held with [Name of Bidder] in relation to the bid price.

*{or}* The best evaluated bid is only [state percentage] % below the valuation/reserve price and it is therefore recommended that the award be made to [Name of Bidder] for a total contract value of [currency and amount] for [list all items that the award relates to].

*{or}* [State other appropriate recommendation.]

**Signed by the Evaluation Committee:**

I confirm that this Evaluation Report gives a complete and accurate report of the evaluation conducted:

Name: \_\_\_\_\_ Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Name: \_\_\_\_\_ Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Name: \_\_\_\_\_ Signature: \_\_\_\_\_ Date: \_\_\_\_\_

**Annexes: {amend as appropriate}**

DPA Form 130/131: Record of Issue of Solicitation Documents or Addenda

DPA Form 134: Record of Receipt of Bids

DPA Form 135: Record of Bid Opening

Table 1: Summary of Preliminary Examination and Assessment of Eligibility

Table 2: Summary of Application of Other Evaluation Criteria

Table 3: Summary of Financial Evaluation

**DISPOSAL EVALUATION REPORT**  
**(EVALUATION BASED ON PRICE AND OTHER FACTORS)**

PD Entity Name and Code	Budget Year	Sequence Number

**Documents available from the Procurement and Disposal Unit: {amend as appropriate}**

Copy of the solicitation document.

Copy of all Bids.

**TABLE 1 – PRELIMINARY EXAMINATION AND ASSESSMENT OF ELIGIBILITY**

PD Entity Code	Budget Year	Sequence Number

	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>	<b>6</b>
<b>Bidder Name</b>						
<b>Eligibility Criteria</b>						
<i>{Complete criteria as per solicitation document}</i>	C/NC	C/NC	C/NC	C/NC	C/NC	C/NC
	C/NC	C/NC	C/NC	C/NC	C/NC	C/NC
	C/NC	C/NC	C/NC	C/NC	C/NC	C/NC
	C/NC	C/NC	C/NC	C/NC	C/NC	C/NC
	C/NC	C/NC	C/NC	C/NC	C/NC	C/NC
	C/NC	C/NC	C/NC	C/NC	C/NC	C/NC
	C/NC	C/NC	C/NC	C/NC	C/NC	C/NC
	C/NC	C/NC	C/NC	C/NC	C/NC	C/NC
	C/NC	C/NC	C/NC	C/NC	C/NC	C/NC
	C/NC	C/NC	C/NC	C/NC	C/NC	C/NC
	C/NC	C/NC	C/NC	C/NC	C/NC	C/NC
	C/NC	C/NC	C/NC	C/NC	C/NC	C/NC
	C/NC	C/NC	C/NC	C/NC	C/NC	C/NC
	C/NC	C/NC	C/NC	C/NC	C/NC	C/NC
	C/NC	C/NC	C/NC	C/NC	C/NC	C/NC
	C/NC	C/NC	C/NC	C/NC	C/NC	C/NC
	C/NC	C/NC	C/NC	C/NC	C/NC	C/NC
	C/NC	C/NC	C/NC	C/NC	C/NC	C/NC
<b>Conclusion</b>	<b>C/NC</b>	<b>C/NC</b>	<b>C/NC</b>	<b>C/NC</b>	<b>C/NC</b>	<b>C/NC</b>

**KEY: C = Compliant NC = Non Compliant** *{delete that which is not applicable from the table above}*

This preliminary examination eliminated [number] bidders, [Names of Bidders].



**TABLE 2 – SUMMARY OF APPLICATION OF OTHER EVALUATION CRITERIA**

PD Entity Code	Budget Year	Sequence Number

	1	2	3	4	5	6
<b>Bidder Name</b>						
<b>Other Evaluation Criteria</b>	<i>{Enter compliant/non compliant or score}</i>					
<i>{Complete criteria as listed in solicitation document}</i>						
<b>Conclusion</b>						

This examination eliminated [number] bidders, [Names of Bidders].

**TABLE 3 – SUMMARY OF FINANCIAL EVALUATION**

PD Entity Code	Budget Year	Sequence Number

**ITEM/LOT NUMBER:** \_\_\_\_\_

**EVALUATION CURRENCY:** \_\_\_\_\_

**ASSET REGISTER NUMBER:** \_\_\_\_\_

**VALUATION/RESERVE PRICE:** \_\_\_\_\_

No	Name of Bidder	Bid Currency	Bid Total (Read Out)	Corrections made	Corrected Amount	Exchange Rate	Evaluated Total	Rank

*{The highest price should be ranked as number 1. Attach a separate table for each item or lot}.*

**SUBMISSION TO CONTRACTS COMMITTEE: .....**  
**REQUEST FOR APPROVAL OF EVALUATION REPORT AND RECOMMENDATIONS**

PD Entity Code	Budget Year	Sequence Number

Subject of Disposal:		International / Domestic
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SUBMISSION INFORMATION		
C1	Are negotiations required? (Yes/No) If yes, attach details using LG DPA Form	
C2	Any other relevant information	

**Documents Attached:** *(list any other documents or delete if not applicable)*

1. LG DPA Form 8/ 9: Evaluation Report
2. LG DPA Form 11 : Negotiations Plan *(if applicable)*
3. LG DPA Form 7: Proposed Negotiation Team *(if applicable)*

**Related Documents Submitted Previously:** *(available for reference from Secretary to Contracts Committee or Head of Procurement and Disposal Unit)*

1. Bidding Document and any Addenda

<b>Previous Submission:</b> <i>(Section letter and title)</i>		<b>Date Approved:</b>	
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The information contained in this form and the attached documents is complete, true and accurate and in accordance with the Local Governments (Public Procurement and Disposal of Public Assets) Regulations, 2006:

Signature: \_\_\_\_\_ Name: \_\_\_\_\_

Position: \_\_\_\_\_ Date: \_\_\_\_\_  
*Responsible Officer* *(DD/MM/YY)*

**NEGOTIATIONS PLAN**

PD Entity Name and Code	Budget Year	Sequence Number

Subject of Disposal:	
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Name of Bidder:	
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ISSUE	OBJECTIVES	NEGOTIATION PARAMETERS

Proposed Negotiations prepared by:

Signature: \_\_\_\_\_ Name: \_\_\_\_\_ Position: \_\_\_\_\_ Date: \_\_\_\_\_

*The negotiations plan must be approved by the Contracts Committee prior to negotiations being held. The Negotiation Team must also be approved using DPA Form 140.*

**RECORD OF MINUTES OF NEGOTIATIONS**

PD Entity Name and Code	Budget Year	Sequence Number

Subject of Disposal:	
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<b>PART 1: Record of Negotiations</b>	
<b>ISSUE</b>	<b>AGREEMENT (WITH FULL DETAILS)</b>

I hereby certify that the above is a true and accurate record of the negotiations:

Signature: \_\_\_\_\_ Name: \_\_\_\_\_ Position: \_\_\_\_\_ Date: \_\_\_\_\_  
*For the Procuring and Disposing Entity*

Signature: \_\_\_\_\_ Name: \_\_\_\_\_ Position: \_\_\_\_\_ Date: \_\_\_\_\_  
*For the Bidder*

Insert Name of Procuring and Disposing Entity

**RECORD OF MINUTES OF NEGOTIATIONS**

PD Entity Name and Code	Budget Year	Sequence Number

**PART 2: Record of Attendance at Negotiations**

No	Name	Position and Department	Representing <i>(Procuring and Disposing Entity / Bidder)</i>	Signature

**RECORD OF MINUTES OF NEGOTIATIONS**

PD Entity Name and Code	Budget Year	Sequence Number

**PART 3: Recommendations to the Contracts Committee**

The recommendation of the Negotiation Team in relation to the negotiations detailed in Part 1 is:

**SUBMISSION TO CONTRACTS COMMITTEE: .....**

**SECTION D: REQUEST FOR APPROVAL OF CONTRACT AWARD AND DOCUMENT**

PD Entity Code	Budget Year	Sequence Number

Subject of Disposal:		International / Domestic
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SUBMISSION INFORMATION		
D1	Were negotiations held? (Yes/No) If yes, attach DPA Form 151 Record of Negotiations	
D2	Bidder recommended for contract award	
D3	Currency and total value of recommended contract	
D4	Any other relevant information	

**Documents Attached:** *(list any other documents or delete if not applicable)*

1. LG DPA Form : Record of negotiations *(if applicable)*
2. Draft Contract

**Related Documents Submitted Previously:** *(available for reference from Secretary to Contracts Committee or Head of Procurement and Disposal Unit)*

1. Approved Evaluation Report

<b>Previous Submission:</b> <i>(Section letter and title)</i>		<b>Date Approved:</b>	
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The information contained in this form and the attached documents is complete, true and accurate and in accordance with the Local Government (Public Procurement and Disposal of Public Assets) Regulations, 2006:

Signature: \_\_\_\_\_ Name: \_\_\_\_\_

Position: \_\_\_\_\_ Date: \_\_\_\_\_  
*Responsible Officer (DD/MM/YY)*



**RECORD OF PUBLIC AUCTION**

Name of Auctioneer:		Date of Auction:	
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No	Disposal Reference Number	Subject of Disposal	Reference Number from Asset Register	Name of Successful Bidder	Reserve Price	Contract Value
					Grand Total:	

I hereby certify that the above is a true and accurate record of the auction:

Signature: \_\_\_\_\_ Name: \_\_\_\_\_ Position: \_\_\_\_\_ Date: \_\_\_\_\_

*Alternative formats may be used, where this information is provided by the auctioneer.*

**AGREEMENT FOR THE TRANSFER OF AN ASSET TO  
ANOTHER PROCURING AND DISPOSING ENTITY**

PD Entity Name and Code	Budget Year	Sequence Number

<b>Subject of Disposal:</b>	
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<b>AGREEMENT BETWEEN</b>	
<b>Transferring Procuring and Disposing Entity</b>	<b>Recipient Procuring and Disposing Entity</b>

<b>Description of Asset(s) to be transferred:</b> <i>(Quantity, full description, asset reference numbers, any identifying features or references. List all additional items or accessories included e.g. spare parts)</i>	
<b>Cost to be paid by recipient for transfer:</b>	
<b>Date of Transfer:</b>	
<b>Date and Method of Payment:</b>	

**AGREEMENT FOR THE TRANSFER OF AN ASSET TO ANOTHER PROCURING AND DISPOSING ENTITY**

PD Entity Name and Code	Budget Year	Sequence Number

<b>Documentation to be provided by transferring procuring and disposing entity:</b> <i>(e.g. manual, handbook, registration certificate, licence etc)</i>	
<b>Location for Handover:</b> <i>(State who is responsible for collecting/delivering the asset)</i>	
<b>Any linked items or accessories excluded from transfer:</b>	
<b>Additional Information or Terms:</b> <i>(e.g. any legal obligations linked to the asset, additional terms of transfer etc)</i>	Asset(s) is/are sold on an “as is, where is” basis. The Transferring Procuring and Disposing Entity name above shall no further liability for the asset(s) after the transfer. (Amend as appropriate)

**Agreement by Recipient Procuring and Disposing Entity:**

I hereby certify that I will accept the asset(s) described above on the terms and conditions described above and make the payment described above:

Signature: \_\_\_\_\_ Name: \_\_\_\_\_

Position: \_\_\_\_\_ Date: \_\_\_\_\_  
*Accounting Officer (DD/MM/YY)*

**Agreement by Transferring Procuring and Disposing Entity:**

I hereby certify that I will release the asset(s) described above for transfer on the terms and conditions described above:

Signature: \_\_\_\_\_ Name: \_\_\_\_\_

Position: \_\_\_\_\_ Date: \_\_\_\_\_  
*Accounting Officer (DD/MM/YY)*

**RECEIPT OF PAYMENT FOR ASSET**

PD Entity Name and Code	Budget Year	Sequence Number

<b>Subject of Disposal:</b>	
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<b>Payment received from:</b> <i>(Name and contact information of payer)</i>	
<b>Amount of Payment:</b> <i>(In words and figures)</i>	
<b>Method of Payment:</b> <i>(Cash, cheque etc)</i>	
<b>Payment in respect of:</b> <i>(Description of asset and asset reference number)</i>	
<b>Type of payment:</b> <i>(Deposit, part payment, full payment etc)</i>	

**Certification by Responsible Officer:**

I hereby certify that payment has been received as described above:

Signature: \_\_\_\_\_ Name: \_\_\_\_\_  
 Position: \_\_\_\_\_ Date: \_\_\_\_\_  
*(DD/MM/YY)*

**HANDOVER CERTIFICATE**

PD Entity Name and Code	Budget Year	Sequence Number

<b>Subject of Disposal:</b>	
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<b>Asset(s) released to:</b> <i>(Name and contact information of recipient)</i>	
<b>Description of Asset(s):</b> <i>(Quantity, full description, asset reference numbers, any identifying features or references. List all additional items or accessories included e.g. spare parts)</i>	
<b>Documentation Included:</b> <i>(List all documentation handed over e.g. manual, handbook, registration certificate, licence etc)</i>	
<b>Date, Time and Location of Release:</b>	
<b>Comments:</b>	

**Certification by Recipient:**

I hereby certify that I have received and accepted the asset(s) and documentation described above at the date, time and location described above:

Signature: \_\_\_\_\_ Name: \_\_\_\_\_

Date: \_\_\_\_\_  
*(DD/MM/YY)*

**CERTIFICATE OF CONVERSION OR  
CLASSIFICATION INTO ANOTHER FORM**

PD Entity Name and Code	Budget Year	Sequence Number

<b>Subject of Disposal:</b>	
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<b>PART 1: PROPOSED CONVERSION OR CLASSIFICATION INTO ANOTHER FORM</b>	
<b>Asset(s) to be converted or reclassified:</b> <i>(Quantity, full description, asset reference numbers etc. List any additional items or accessories to be converted or reclassified)</i>	
<b>Method of conversion or reclassification:</b> <i>(Include final form of asset(s))</i>	
<b>Official/Provider responsible for conversion or reclassification:</b>	

**Authorisation by Accounting Officer (unless authority is delegated):**

Authority is granted to convert or reclassify the asset(s) described above, using the method described above:

Signature: \_\_\_\_\_ Name: \_\_\_\_\_

Position: \_\_\_\_\_ Date: \_\_\_\_\_

*(DD/MM/YY)*

<b>PART 2: CONFIRMATION OF CONVERSION OR CLASSIFICATION INTO ANOTHER FORM</b>	
<b>Date, Time and Location of conversion or reclassification:</b>	
<b>Comments:</b>	

**Certification by Responsible Officer/Provider:**

I hereby certify that the asset(s) described above was converted or reclassified as detailed above:

Signature: \_\_\_\_\_ Name: \_\_\_\_\_

Position: \_\_\_\_\_ Date: \_\_\_\_\_

*(DD/MM/YY)*

**CERTIFICATE OF DESTRUCTION**

PD Entity Name and Code	Budget Year	Sequence Number

<b>Subject of Disposal:</b>	
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<b>PART 1: PROPOSED DESTRUCTION</b>	
<b>Asset(s) to be destroyed:</b> <i>(Quantity, full description, asset reference numbers etc. List any additional items or accessories to be destroyed)</i>	
<b>Method of destruction:</b> <i>(Give details of proposed date and location for destruction if relevant)</i>	
<b>Official/Provider responsible for destruction:</b>	

**Authorisation by Accounting Officer (unless authority is delegated):**

Authority is granted to destroy the asset(s) described above, using the method described above:

Signature: \_\_\_\_\_ Name: \_\_\_\_\_

Position: \_\_\_\_\_ Date: \_\_\_\_\_

*(DD/MM/YY)*

<b>PART 2: CONFIRMATION OF DESTRUCTION</b>	
<b>Date, Time and Location of destruction:</b>	
<b>Comments:</b>	

**Certification by Responsible Officer/Provider:**

I hereby certify that the asset(s) described above was destroyed as detailed above:

Signature: \_\_\_\_\_ Name: \_\_\_\_\_

Position: \_\_\_\_\_ Date: \_\_\_\_\_

*(DD/MM/YY)*

**DELEGATION OF AUTHORITY FOR DISPOSAL**

**PART 1: CONTRACTS COMMITTEE RECOMMENDATION**

*To be forwarded by the Contracts Committee to the Accounting Officer*

A delegation of authority is recommended to the person/body below for the functions/decisions detailed below.

Person or Body: \_\_\_\_\_

Position: \_\_\_\_\_ Department: \_\_\_\_\_

Commencement date: \_\_\_\_\_ Duration: \_\_\_\_\_

Type of Function or Decision	Yes/No	Value Limitation	Other Limitations*
Entire disposal function			
Approval of Disposal method			
Approval of Auctioneer			
Approval of Bidding document			
Approval of Evaluation report			
Approval of Contract award and document			
Approval of Transfer Agreement			

**Reporting requirements and any other requirements, conditions or limitations\*:**

Recommendation by the Contracts Committee:

Signature: \_\_\_\_\_  
(Chairperson)

Date: \_\_\_\_\_  
(DD/MM/YY)

*\*Provide details on separate pages and attach if necessary. All attachments must be signed in the same way as this form.*



## DELEGATION OF AUTHORITY FOR DISPOSAL

### PART 2: ACCOUNTING OFFICER AUTHORISATION

*To be forwarded by the Accounting Officer to the person or body with delegated authority and copied to the Contracts Committee if approved. To be returned to the Contracts Committee with reasons if rejected.*

**Approval / Rejection** of Recommendation to delegate authority (*delete as applicable*)

*State reasons if delegation is rejected. State name of person or body if delegation is approved.*

Authority is delegated to you as detailed in the attached Part 1 of PP Form 213. No further delegation of this authority is permitted.

You are required to comply with the Public Procurement and Disposal of Public Assets Act, 2003 and all requirements, conditions or limitations detailed in Part 1 of this form at all times. You are required to notify the Contracts Committee immediately if you become unable to comply with any of these.

If delegation is for the entire disposal function, you are required to operate a Contracts Committee and Procurement and Disposal Unit, as established by the Accounting Officer.

This delegation of authority may be revoked at any time by means of a written notice.

Authorisation by the Accounting Officer:

Signature: \_\_\_\_\_  
(Accounting Officer)

Date: \_\_\_\_\_  
(DD/MM/YY)

**Local Governments  
(Public Procurement and Disposal of Public Assets)  
Guidelines, 2008**

**Details covered in this Guideline:**

<b>Guideline Subject:</b>	<b>Records to be kept by Procuring and Disposal Unit</b>
<b>Guideline Reference:</b>	<b>No. 9/2008</b>
<b>Guideline Issue Date:</b>	<b>25<sup>th</sup> January 2008</b>

**Guideline Subject:      Records to be kept by Procuring and Disposal Unit**

In accordance with Regulation 46 (2) of the Local Governments (Public Procurement and Disposal of Public Asset) Regulations 2006, the following records shall be kept by the Procurement and Disposal Unit.

**1. Procurement and Disposal Records**

Procurement records maintained by a procurement and disposal unit shall contain, where appropriate-

- (a) a request to initiate procurement proceedings;
- (b) a copy of the published advertisement or shortlist;
- (c) a copy of the pre-qualification and solicitation documents and any amendments or clarifications;
- (d) a record of bid closing and bid openings;
- (e) a copy of all bids evaluated or clarifications requested and responses received;
- (f) the evaluation report;
- (g) minutes of meetings on procurement, including pre-bid/ site survey and negotiation meetings;
- (h) a notice of best evaluated bidder;
- (i) any letter of bid acceptance to the provider;
- (j) the contract document;
- (k) contract amendments;
- (l) all correspondences between a procuring and disposing entity and a bidder or potential bidder; and
- (m) a copy of all submissions to and all decisions of the contracts committee related to the procurement

**2. Inspection of Records**

The records listed above shall be open to inspection by officials from the Authority and the Ministry of Local Governments during working hours.

**3. Formats for Records**

The records kept by the procurement and disposal unit shall use the format of the standard forms attached hereto and the standard forms in Guideline 8 and 10 of the Local Governments (Public Procurement and Disposal of Public Assets) Guidelines, 2006.

**LIST OF FORMS FOR THE RECORDS TO BE KEPT BY PDU<sup>1</sup>**

<b>Form Number</b>	<b>Name of Form</b>	<b>Regulation Reference</b>
LG Form R 1	Notification of Membership of Procurement and Disposal Unit	Regulation 23 (2)
LG Form R 2	Procurement and Disposal Personnel Details	Regulation 23 (2)
LG Form R 3	Contracts decision on a Submission	Regulation 18 (3)
LG Form R 4	Contract Implementation Plan	Regulation 119 (3)
LG Form R 5	Letter of Bid Acceptance	Regulation 86 (1) (a)

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<sup>1</sup> These records are in addition to the records listed under the Procedural Forms in Guideline No8/2006 and the Standard Notice Formats in Guideline No.10/2006

**NOTIFICATION OF MEMBERSHIP OF PROCURMENT AND DISPOSAL UNIT**

Name of Procuring and Disposing Entity:	
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Subdivision of Entity ( <i>delegated Units only</i> ):	
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No	Name	Position	Department	Date of Appointment

The Procurement and Disposal Unit was established by:

Signature: \_\_\_\_\_ Name: \_\_\_\_\_ Position: \_\_\_\_\_ Date: \_\_\_\_\_

**CONTRACT IMPLEMENTATION PLAN**

PD Entity Code	Wrks/Srvcs/Supplies?	Budget Year	Sequence Number

<b>CONTACT AND PROFESSIONAL DETAILS OF THE PDU<sup>2</sup></b>	
Full Name:	
Office Address:	
Direct Telephone Number:	
Mobile Number:	
Fax Number:	
Email Address:	
Details of any professional or academic qualifications in the field of procurement:	
Membership of any professional bodies:	

Details completed by:

Signature: \_\_\_\_\_ Name: \_\_\_\_\_

Position: \_\_\_\_\_ Date: \_\_\_\_\_ (DD/MM/YY)

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<sup>2</sup> Complete a separate form for each member of the Disposal Unit. Submit form to the Authority following appointment or recruitment of member. Once submitted, forms do not need to be resubmitted unless any details have changed.

**CONTRACT IMPLEMENTATION PLAN**

PD Entity Code	Wrks/Srvcs/Supplies?	Budget Year	Sequence Number

**SUBMISSION INFORMATION**

Subject of Procurement or Disposal	
Submission made (Section Letter and Title of Submission Form)	
Date/reference of Contracts Committee Meeting	

**CONTRACTS COMMITTEE DECISION**

**Approval / Rejection** of Submission to Contracts Committee *(delete as applicable)*

*List all conditions to any approval; list all reasons for any rejection.*

For Contract Awards, Documents and Amendments, state name of successful bidder/provider and total of contract award or amendment (currency, amount, including/excluding VAT and increase/decrease if applicable).

All contract documents, Letters of Bid Acceptance and contract amendments must be signed by the Accounting Officer or an official authorised by the Accounting Officer to sign. For procurement requirements, any request to sign submitted to the Accounting Officer must state the earliest date on which the document may be issued, allowing sufficient time for publication of a Notice of Best Evaluated Bidder, where required.

For procurement requirements, funds must be committed **before** the issue of any such document.

Where required, clearance must be obtained from the Solicitor General **before** the issue of any document.

Signature: \_\_\_\_\_ Name: \_\_\_\_\_

Position: \_\_\_\_\_ Date: \_\_\_\_\_ (DD/MM/YY)

**CONTRACT IMPLEMENTATION PLAN**

PD Entity Code	Wrks/Srvcs/Supplies?	Budget Year	Sequence Number

<b>Contract Events/Deliverables</b>	<b>Dates Due, Quantities/Amounts etc</b>
<i>Complete in accordance with contract<sup>3</sup>. Contract events/deliverables shown are examples only.</i>	
<b>Contract Start-up/Mobilisation</b>	
Receipt of performance guarantee and release of bid securities	
Receipt of advance payment guarantee	
Payment of advance payment	
First deliverables e.g. inception report/first delivery etc	
<b>Contract Progress</b>	
Subsequent deliverables e.g. progress reports/works completed/time period completed/supplies delivered etc	
Interim or stage payments	
Reduction of guarantees	
<b>Contract Completion</b>	
Final deliverables e.g. final report/completion of works/final delivery/installation and commissioning	
Acceptance/handover	
Reconciliation of payments against contract	
Final payment	
Release of guarantees	
Expiry of warranty/liability period	

**Contract Implementation Plan prepared by:**

Name of Contract Manager: \_\_\_\_\_ Signature \_\_\_\_\_

Date: \_\_\_\_\_ (DD/MM/YYYY)

<sup>3</sup> A Contract Implementation Plan shall be prepared for all contracts, except those under Micro Procurement. It shall be submitted to the PDU by the Contract Manager, within five working days of receipt of the signed contract



*Letterhead of the Procuring and Disposing Entity*

[Name of Successful Bidder]

[Address of Successful Bidder]

Date:

Dear Sirs

**Letter of Bid Acceptance**

This is to inform you that your Bid detailed below has been accepted. A written contract is being drafted and shall be forwarded to you for your signature by [date].

Procurement Reference No:

Subject of Procurement:

Bidder's Bid Reference:

Date of Bid:

Contract Award amount:

Identification of Bid items  
excluded from contract award:

Identification of correspondence  
included in this Award:

Commencement Date:

Special notes:

You are required to confirm receipt of this letter and confirm that you are proceeding with the requirement.

Signature of this letter confirms the financial commitment of the procuring and disposing entity to the contract.


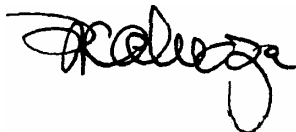
Yours faithfully

Accounting Officer

[Name]

[Name of the Procuring and Disposing Entity]

**Signed:**



.....  
**Chairman of the Board of Directors**

.....  
**Executive Director of the Authority**

**Public Procurement and Disposal of Public Assets Authority**

**Local Governments  
(Public Procurement and Disposal of Public Assets)  
Guidelines, 2008**

**Details covered in this Guideline:**

<b>Guideline Subject:</b>	<b>Standard Notice Formats</b>
<b>Guideline Reference:</b>	<b>No. 10/2008</b>
<b>Guideline Issue Date:</b>	<b>25<sup>th</sup> January 2008</b>

**Guideline Subject: Standard Notice Formats**

**LIST OF STANDARD NOTICE FORMATS**

In accordance with Regulation 6 and 12 of the Local Government (Public Procurement and Disposal of Public Assets) Regulations 2006, the following formats shall be used for publication of notices on procurement and disposal transactions.

**Procurement:**

1. Prequalification Notice
2. Bid Notice
3. Shortlist Notice
4. Best Evaluated Bidder Notice
5. Notification of Contract Award for Procurement

**Disposal:**

6. Notification of Auction Notice
  7. Bid Notice for Disposal by Public Bidding
  8. Bid Notice for Disposal by sale to Public Officers
  9. Contract Award Notice
-

***Invitation to Pre-Qualify for [Subject of Procurement]***

*[Insert Procurement Reference number].*

The *[insert name of procuring and disposing entity]* has allocated/received funds *[if received state source]* and intends to apply part of the proceeds of these funds towards the cost of *[insert description of works/services/supplies to be procured]*.

The *[insert name of procuring and disposing entity]* now invites suitably qualified bidders to submit sealed pre-qualification submissions/expressions of interest for *[insert description of works/services/supplies to be procured]*.

*[Insert brief narrative of works/services/supplies required, normally four to six lines, including quantities, time period, location of project and other information necessary to enable potential bidders to decide whether to respond to the invitation.]*

*[Insert details of the pre-qualification criteria, including specific experience, capabilities, qualifications, facilities or capacity required etc.]*

Pre-qualification submissions/expressions of interest will be evaluated in accordance with the Local Governments (Amendment) Act, 2006 of the Government of Uganda. Pre-qualification is open to all eligible bidders. *[If there are any restrictions on eligibility, such as source countries, include these here. Also include any preference or reservation scheme that will apply.]*

*{Where there is a pre-qualification document}*

Interested eligible bidders may obtain further information from *[insert name of procuring and disposing entity]* and inspect the pre-qualification documents at the address given below, *[insert address at end of document]* from *[insert office hours]*.

The pre-qualification documents in *[insert language]* may be purchased by interested bidders on the submission of a written application to the address below *[state address at the end of document]* and upon payment of a non-refundable fee of *[insert amount in local currency]* or *[insert amount in specified convertible currency]*. The method of payment will be *[insert method of payment]*. The document will be sent by *[insert delivery procedure]*. No liability will be accepted for loss or late delivery.

*{Where there is no pre-qualification document and bidders are to submit expressions of interest directly}*

Interested eligible bidders may submit expressions of interest to *[insert name of procuring and disposing entity]*, including *[insert details of information or documentation required]*.

Pre-qualification submissions/expressions of interest must be delivered to the address below at or before *[insert time and date]*. Late submissions shall be rejected.

*[Insert name of office and name of officer]*

*[Insert postal address] and/or [Insert street address]*

*[Insert telephone and facsimile number, indicate country and city code]*

***Invitation for Bids for the Sale of [Subject of Disposal]***

*Disposal Reference number.*

The *[insert name of procuring and disposing entity]* intends to sell *[insert description of asset(s)]*. The *[insert description of asset(s)]* are sold on an “as is, where is” basis and the *[insert name of procuring and disposing entity]* will have no further liability after sale. *(Amend if different).*

The *[insert name of procuring and disposing entity]* now invites sealed bids for the purchase of *[insert description of asset(s) being sold]*.

Bidding will be conducted in accordance with the Local Governments (Amendment) Act, 2006 of the Government of Uganda and is open to all bidders. *(Or state eligibility criteria, if any).*

Interested bidders may inspect the *[insert description of asset(s)]* at *[insert location for inspection]* on *[insert date(s) for inspection]* from *[insert hours for inspection]*.

Interested bidders may obtain further information from *[insert name of procuring and disposing entity]* and inspect the bidding documents at the address given below, *[insert address at end of document]* from *[insert office hours]*.

The Bidding Documents in *[insert language]* may be purchased by interested bidders on the submission of a written application to the address below *[state address at the end of document]* and upon payment of a non-refundable fee of *[insert amount in local currency]* or *[insert amount in specified convertible currency]*. The method of payment will be *[insert method of payment]*. The document will be sent by *[insert delivery procedure]*. No liability will be accepted for loss or late delivery.

Bids must be delivered to the address below at or before *[insert time and date]*. Late bids shall be rejected. Bids will be opened in the presence of the bidders' representatives who choose to attend at the address below at *[insert time and date]*.

*[Insert name of office and name of officer]*

*[Insert postal address] and/or [Insert street address]*

*[Insert telephone and facsimile number, indicate country and city code]*

**The Local Governments (Public Procurement And Disposal of Public Assets) Guidelines, 2008**

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**SHORTLIST NOTICE  
(FOR PROCUREMENT AND DISPOSAL NOTICE BOARD)**

The bidders listed below have been short-listed for the procurement requirement detailed below.

Procurement Reference number:	
Subject of Procurement:	
Method of Procurement:	
<b>NAMES OF SHORT-LISTED BIDDERS:</b>	
1	
2	
3	
4	
5	
6	
7	
8	
9	
10	

Date for Display:	
Date for Removal:	

**Authorised for display on Procurement and Disposal Notice Board:**

Signature: \_\_\_\_\_ Name: \_\_\_\_\_

Position: \_\_\_\_\_ Date: \_\_\_\_\_  
(DD/MM/YY)

**The Local Governments (Public Procurement And Disposal of Public Assets) Guidelines, 2008**

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**BEST EVALUATED BIDDER NOTICE  
(FOR PROCUREMENT AND DISPOSAL NOTICE BOARD)**

The bidder named below has been evaluated as the best evaluated bidder for the procurement requirement detailed below. It is the intention of the Procuring and Disposing Entity to place a contract with the bidder named after ten/five (*delete as applicable*) working days from the date for display given below.

Procurement Reference number:	
Subject of Procurement:	
Method of Procurement:	
Name of Best Evaluated Bidder:	
Total Contract Price:	

Date for Display:	
Date for Removal:	

Display of this Notice does not constitute an acceptance of the bid described above or the formation of a contract. Bid acceptance and contract placement shall be in accordance with the Regulations.

**Authorised for display on Procurement and Disposal Notice Board:**

Signature: \_\_\_\_\_ Name: \_\_\_\_\_

Position: \_\_\_\_\_ Date: \_\_\_\_\_  
(DD/MM/YY)

*To be copied to all bidders who submitted bids, including the best evaluated bidder.*

**The Local Governments (Public Procurement And Disposal of Public Assets) Guidelines, 2008**

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**NOTIFICATION OF CONTRACT AWARD FOR PROCUREMENT  
(FOR PROCUREMENT AND DISPOSAL NOTICE BOARD)**

The provider named below has been awarded a contract for the procurement requirement detailed below.

Procurement Reference number:	
Subject of Procurement:	
Method of Procurement:	
Name of Provider:	
Date of Contract Award:	
Total Contract Price:	

Date for Display:	
Date for Removal:	

**Authorised for display on Procurement and Disposal Notice Board:**

Signature: \_\_\_\_\_ Name: \_\_\_\_\_

Position: \_\_\_\_\_ Date: \_\_\_\_\_  
(DD/MM/YY)



***Notification of Auction for the Sale of [Subject of Disposal]***

*Disposal Reference number(s).*

The *[insert name of Procuring and Disposing Entity]* intends to sell *[insert description of asset(s)]* by auction. The *[insert description of asset(s)]* are sold on an “as is, where is” basis and the *[insert name of Procuring and Disposing Entity]* will have no further liability after sale. *(Amend if different).*

The auction will be conducted by *[insert name of auctioneer]* at *[insert location of auction]* on *[insert date of auction]* at *[insert time of auction]*.

Interested bidders may inspect the *[insert description of asset(s)]* at *[insert location for inspection]* on *[insert date(s) for inspection]* from *[insert hours for inspection]*.

Further information and an auctioneer’s catalogue can be obtained from *[insert name and address of auctioneer]*.

*Where the auctioneer publishes an alternative notice, this notice should be displayed on the procuring and disposing entity’s notice board.*

***Invitation for Bids for the Sale of [Subject of Disposal]***

*Disposal Reference number.*

The *[insert name of procuring and disposing entity]* intends to sell *[insert description of asset(s)]*. The *[insert description of asset(s)]* are sold on an “as is, where is” basis and the *[insert name of procuring and disposing entity]* will have no further liability after sale. *(Amend if different).*

The *[insert name of procuring and disposing entity]* now invites sealed bids for the purchase of *[insert description of asset(s) being sold]*.

Bidding will be conducted in accordance with the Local Governments (Amendment) Act, 2006 of the Government of Uganda and is open to all bidders. *(Or state eligibility criteria, if any).*

Interested bidders may inspect the *[insert description of asset(s)]* at *[insert location for inspection]* on *[insert date(s) for inspection]* from *[insert hours for inspection]*.

Interested bidders may obtain further information from *[insert name of procuring and disposing entity]* and inspect the bidding documents at the address given below, *[insert address at end of document]* from *[insert office hours]*.

The Bidding Documents in *[insert language]* may be purchased by interested bidders on the submission of a written application to the address below *[state address at the end of document]* and upon payment of a non-refundable fee of *[insert amount in local currency]* or *[insert amount in specified convertible currency]*. The method of payment will be *[insert method of payment]*. The document will be sent by *[insert delivery procedure]*. No liability will be accepted for loss or late delivery.

Bids must be delivered to the address below at or before *[insert time and date]*. Late bids shall be rejected. Bids will be opened in the presence of the bidders' representatives who choose to attend at the address below at *[insert time and date]*.

*[Insert name of office and name of officer]*

*[Insert postal address] and/or [Insert street address]*

*[Insert telephone and facsimile number, indicate country and city code]*

***Sale to Public Officials***

***Invitation for Bids for the Sale of [Subject of Disposal]***

*Disposal Reference number.*

The *[insert name of Procuring and Disposing Entity]* intends to sell *[insert description of asset(s)]*. The *[insert description of asset(s)]* are sold on an “as is, where is” basis and the *[insert name of Procuring and Disposing Entity]* will have no further liability after sale.

The *[insert name of Procuring and Disposing Entity]* now invites sealed bids for the purchase of *[insert description of asset(s) being sold]*.

Bidding will be conducted in accordance with the Local Governments (Public Procurement and Disposal of Public Assets ) Regulations, 2006 of the Government of Uganda and is open to all public officials, who have not been involved in the valuation or disposal process.

Interested officials may inspect the *[insert description of asset(s)]* at *[insert location for inspection]* on *[insert date(s) for inspection]* from *[insert hours for inspection]*.

The Bidding Documents may be obtained by interested officials on the submission of a written application to *[insert office number]*.

Bids must be delivered to *[insert office number]* at or before *[insert time and date]*. Late bids shall be rejected.

**The Local Governments (Public Procurement And Disposal of Public Assets) Guidelines, 2008**

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**NOTIFICATION OF CONTRACT AWARD FOR DISPOSAL  
(FOR PROCUREMENT AND DISPOSAL NOTICE BOARD)**

The person named below has been awarded a contract for the disposal requirement detailed below.

Disposal Reference number:	
Subject of Disposal:	
Method of Disposal:	
Contract awarded to (Name):	
Date of Contract Award:	
Total Contract Price:	

Date for Display:	
Date for Removal:	

**Authorised for display on Procurement and Disposal Notice Board:**

Signature: \_\_\_\_\_ Name: \_\_\_\_\_

Position: \_\_\_\_\_ Date: \_\_\_\_\_  
(DD/MM/YY)

**Signed:**



.....

**Chairman of the Board of Directors**



.....

**Executive Director of the Authority**

**Public Procurement and Disposal of Public Assets Authority**