# ANNEX SER 3: Evaluation Grid for Negotiated Procedure

This is a standard format for evaluation for Negotiated Procedure for Service Contracts. (The format can also be used for evaluation under the Simple Procedure).

Note that the grid must reflect the criteria chosen in the Request for Proposal – SER 2 articles A.11, Evaluation of proposals and A.12 Award criteria. Each member of the Procurement Committee fills in this grid individually and subsequently a common grid is compiled, or a single grid is completed by the Committee seating together. In order not to duplicate documents this document can be used as the evaluation report and recommendation for the award of the contract.

# Project: <name and reference>

**Contract: <contract title>**

**Requests for Proposals - references:** < >, < >, < >, < >

**Closing date for submission of proposals**: < >

**Number of proposals received:** < >

**Date of evaluation:** : < >

The Procurement Committee meets on this date and proceeds with the evaluation

The Procurement Committee met on this date and proceeded with the following evaluation. All members of the Procurement Committee (and observers, if any) have signed Declarations of Impartiality and Confidentiality, which shall be attached to this report.

**Administrative Compliance**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Candidate no.** | **1** | **2** | **3** | **4…** |
| **Candidates name:** |  |  |  |  |
| **Date of submission of proposal:**(if later than closing date: indicate REJECTED and stop evaluation) |  |  |  |  |
| **Compliance of proposal with administrative requirements**(indicate if document or information is missing . If substantial indicate REJECTED and stop evaluation) |  |  |  |  |

If the Candidate is not administrative complaint, reject the proposal and stop the evaluation. If the proposal is compliant proceed with the technical and financial evaluation.

**Technical and Financial Evaluation**

Adapt the following criteria and weights to those criteria and weights you have chosen in article A.13 of the RFP – according to the requirements of your project or the specific Contract (the following are options, based on the criteria and weights in article A. 13 in the RFP). Please ensure that the total technical score is equal to 100.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Candidate no.:** |  | **1** | **2** | **3** | **4…** |
|  | **Maximum points**  | **Score** | **Score after interview (if amended)** | **Score** | **Score after interview (if amended)** | **Score** | **Score after interview (if amended)** | **Score** | **Score after interview (if amended)** |
| **Expertise** |
| (Extent to which any service would be subcontracted) | <insert no.> |  |  |  |  |  |  |  |  |
| (Availability of quality assurance procedures) | <Insert no.> |  |  |  |  |  |  |  |  |
| (Organisation’s specialised knowledge and experience in the field of assignment and selected region) | <Insert no.> |  |  |  |  |  |  |  |  |
| (Candidate’s relevant academic qualifications) | <Insert no.> |  |  |  |  |  |  |  |  |
| (Candidate’s relevant experience in the field of assignment) | <Insert no.> |  |  |  |  |  |  |  |  |
| (Candidate’s experience in the region/country e.g. knowledge of local language, culture, administrative system, government etc.) | <Insert no.> |  |  |  |  |  |  |  |  |
| (Candidate’s proficiency in <insert language> | <Insert no.> |  |  |  |  |  |  |  |  |
| (Candidate’s CSR related policies – e.g. HR policy, health and safety policy, energy policy, climate policy, Global Compact membership etc.) | <Insert no.> |  |  |  |  |  |  |  |  |
| (CSR related certifications e.g. ISO 26000/50001/140000 or SA80000) | <Insert no.> |  |  |  |  |  |  |  |  |
| **Subtotal on expertise** | **<40>** |  |  |  |  |  |  |  |  |
| **(Option: Organisation and Methodology) (Note: delete if annex 2 in the RFP has been deleted)** |
| (To what degree does the proposal show understanding of the task?) | <Insert no.> |  |  |  |  |  |  |  |  |
| (Have the Terms of Reference been addressed in sufficient detail?) | <Insert no.> |  |  |  |  |  |  |  |  |
| (Is the conceptual framework adopted appropriate for the task?) | <Insert no.> |  |  |  |  |  |  |  |  |
| (Is the sequence of activities and the planning logical, realistic and promising efficient implementation to the Contract?) | <Insert no.> |  |  |  |  |  |  |  |  |
| (Is the work plan adequate in responding to the Terms of Reference) | <Insert no.> |  |  |  |  |  |  |  |  |
| **Subtotal on Organisation and Methodology** | **<40>** |  |  |  |  |  |  |  |  |
| **(Option: Expertise of Key expert 1) (Note:delete if single candidate)** |
| (Relevant academic qualifications) | <Insert no.> |  |  |  |  |  |  |  |  |
| (Relevant experience in the field of assignment) | <Insert no.> |  |  |  |  |  |  |  |  |
| (Experience in the region/country e.g. knowledge of local language, culture, administrative system, government etc.) | <Insert no.> |  |  |  |  |  |  |  |  |
| (Proficiency in <insert nation> language) | <Insert no.> |  |  |  |  |  |  |  |  |
| **Subtotal on Key expert 1’s expertise** | **<20>** |  |  |  |  |  |  |  |  |
| **TOTAL TECHNICAL SCORE** | **100** |  |  |  |  |  |  |  |  |

|  |
| --- |
| **Financial Evaluation** |
| **FINANCIAL SCORE[[1]](#footnote-1)** |  |  |  |  |  |

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **OVERALL SCORE[[2]](#footnote-2)**  |  |  |  |  |  |

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Summary:**Selection/award of contract or reason for rejection/no-selection: |  |  |  |  |  |

As a consequence, the decision of the Procurement Committee is that the Service Contract for <....> be awarded <name of candidate>.

**Signatures by members of the Procurement Committee and Secretary**

|  |  |  |
| --- | --- | --- |
| **Title**  | **Name** | **Signature** |
|  |  |  |
|  |  |  |
|  |  |  |

1. Use the following formula: SF = 100 x Fm/F (SF = the financial score; Fm = the lowest price; F = the price of the proposal under evaluation) [↑](#footnote-ref-1)
2. Use the following formula: technical score x ‹0.75› + financial score x ‹0.25› = overall score [↑](#footnote-ref-2)