# ANNEX WOR 3: Evaluation Grid and Report

This is a standard format for evaluation for Works Contracts.

Note that the grid must reflect the criteria chosen in Request for Proposal - WOR 1 article A.15 Evaluation of proposal and A.16 Award Criteria or WOR 2 Tender Dossier article A.18 Evaluation of proposal and A.19 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.

**Part A: 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 with administrative requirements**  (indicate if document or information is missing. If substantial indicate REJECTED and stop evaluation) |  |  |  |  |

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

**Part B. Technical and Financial Evaluation**

Adapt the following criteria to those you have chosen in the Proposal Submission Form in the RFP – according to the requirements of your project or the specific Contract.If you have made a pre-selection of the candidates during short listing and in that process checked financial capacity, experience, references etc. then there is no need to evaluate these points again, but make sure that the evaluation made in the pre-selection is filed.

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Technical Evaluation** | | | | | | | | |
| **Candidate no.:** | **1** | | **2** | | **3** | | **4…** | |
|  | **Before interview** | **After interview** | **Before interview** | **After interview** | **Before interview** | **After interview** | **Before interview** | **After interview** |
| **Technical offer**  Is the technical offer considered to be substantially compliant with the requirements? **(yes/no)** |  |  |  |  |  |  |  |  |
| Write your comments to the above and list deviations, if any. |  |  |  |  |  |  |  |  |
| Financial capacity to fulfil the assignment **(yes/no)** |  |  |  |  |  |  |  |  |
| Sufficient experience and references from similar projects **(yes/no)** (*you can request additional information, if necessary)* |  |  |  |  |  |  |  |  |
| Technical qualifications to fulfil the assignment **(yes/no)** |  |  |  |  |  |  |  |  |
| (Option: Does the candidate have adequate CSR policies in place, as well as relevant certifications e.g. ISO/SA8000 and/or a Code of Conduct? **(yes/no)**) |  |  |  |  |  |  |  |  |
| <Other (as per RFP)> |  |  |  |  |  |  |  |  |
| <Other (as per RFP)> |  |  |  |  |  |  |  |  |
| <Other (as per RFP)> |  |  |  |  |  |  |  |  |
| Comments and sum up |  | |  | |  | |  | |

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Technical Score** | | | | | |
| **Candidate no.:** |  | **1** | **2** | **3** | **4...** |
|  | **Maximum points** |  |  |  |  |
| Use of local labour and local materials | 33% |  |  |  |  |
| Fulfilment of functionality | 33% |  |  |  |  |
| Overall technical solution | 34% |  |  |  |  |
| **TOTAL TECHNICAL SCORE** | **100** |  |  |  |  |

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Financial Evaluation** | | | | |
| **Candidate no.:** | **1** | **2** | **3** | **4…** |
| Global price |  |  |  |  |
| **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 Works 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 ‹0.40› + financial score x ‹0.60› = overall score [↑](#footnote-ref-2)