

Tender Scoring Matrix Standards Document

Purpose:

This document is designed to guide the scoring process for procurement tenders. The aim is to ensure a consistent, transparent, and fair evaluation of all bids, leading to the selection of suppliers who offer the best value for money while meeting all specified requirements. This standard ensures objectivity in the procurement process and minimizes the risk of bias.

Scope:

This document applies to all tender evaluations within the procurement department, regardless of project size or industry.

Scoring Matrix Overview:

The tender scoring matrix is divided into several key evaluation criteria, each weighted according to its importance in achieving the overall objectives of the procurement process. Each bid will be scored based on the defined criteria, with total scores determining the final ranking of bidders.

Evaluation Criteria:

Below are the typical criteria used in tender evaluations, which should be adapted to the specific procurement needs:

1. **Technical Compliance**

* **Weighting***: 30-40%

* **Definition***: Measures how well the bid meets the technical requirements and specifications of the project. This includes performance specifications, quality standards, technical capabilities, and any innovation offered.

* **Scoring Range***:

- * 0 – No compliance
- * 1-2 – Partial compliance, significant deviations
- * 3-4 – Meets minimum technical requirements
- * 5-6 – Meets technical requirements with minor enhancements
- * 7-8 – Meets technical requirements and offers moderate improvements/innovations
- * 9-10 – Exceeds technical requirements with significant innovations or optimizations

2. ****Cost/Price****

* ****Weighting****: 20-30%

* ****Definition****: Evaluates the total cost of ownership, including the initial price and any ongoing operational costs. Consideration should also be given to the pricing structure and financial sustainability.

* ****Scoring Range****:

- * 0 – Price significantly exceeds budget or offers poor value
- * 1-2 – Price is higher than budget, with limited justification
- * 3-4 – Price is within the budget but offers minimal value
- * 5-6 – Price is within the budget and offers reasonable value for money
- * 7-8 – Price is competitive with good value for money
- * 9-10 – Price is very competitive and offers excellent value for money

3. ****Experience and Capability****

* ****Weighting****: 15-25%

* ****Definition****: Assesses the bidder's experience in delivering similar projects and their capability to perform the work. This includes the bidder's track record, industry certifications, and expertise in relevant fields.

* ****Scoring Range****:

- * 0 – No relevant experience or capability

- * 1-2 – Minimal experience or capability with significant concerns
- * 3-4 – Some relevant experience but limited proven success
- * 5-6 – Adequate experience and capability to meet project needs
- * 7-8 – Strong experience and capability with proven success in similar projects
- * 9-10 – Extensive experience and capability with a history of exceeding expectations on similar projects

4. **Risk Management and Compliance**

* **Weighting**: 10-15%

* **Definition**: Evaluates the bidder's approach to risk management, including compliance with legal, safety, and regulatory requirements. Considerations include financial stability, insurances, and adherence to ethical practices.

* **Scoring Range**:

- * 0 – No risk management or compliance mechanisms in place
- * 1-2 – Minimal or insufficient risk management and compliance
- * 3-4 – Adequate risk management but with potential concerns
- * 5-6 – Meets risk management and compliance requirements
- * 7-8 – Strong risk management strategies with full compliance
- * 9-10 – Exemplary risk management practices and proactive compliance measures

5. **Sustainability and Social Responsibility**

* **Weighting**: 5-10%

* **Definition**: Assesses the bidder's commitment to sustainability and corporate social responsibility, including environmental impact, ethical sourcing, and community engagement.

* **Scoring Range**:

- * 0 – No sustainability or social responsibility practices

- * 1-2 – Minimal effort towards sustainability or social responsibility
- * 3-4 – Basic commitment to sustainability and social responsibility
- * 5-6 – Satisfactory sustainability and responsibility practices
- * 7-8 – Strong sustainability initiatives and ethical practices
- * 9-10 – Leading sustainability practices and significant positive social impact

Scoring Procedure:

1. ****Establish a Panel****: A panel of evaluators should be selected based on expertise in the relevant areas. Each evaluator should independently score each bid.
2. ****Apply the Scoring Matrix****: For each criterion, evaluators should refer to the scoring ranges provided and assign a score that reflects the bidder's performance in that area. Scores should be recorded consistently across all bids.
3. ****Calculate Weighted Scores****: Once each criterion has been scored, multiply the score by the corresponding weighting. For example, if a bidder scores 8 out of 10 for Technical Compliance (weighted at 40%), their score for this criterion would be 32.
4. ****Total the Scores****: Add up the weighted scores from all criteria to determine the bidder's total score.
5. ****Final Ranking****: Once all bids have been scored, rank the bids from highest to lowest total score. The bidder with the highest score will be recommended for contract award, subject to due diligence.

Additional Considerations:

- ****Clarifications****: Where scoring reveals ambiguity or missing information in a bid, evaluators may seek clarifications from the bidders before finalizing scores.

- ****Tiebreakers****: In the event of a tie in total scores, the technical compliance score may serve as the tiebreaker. If the technical scores are also tied, the evaluation committee should use price as the deciding factor.
- ****Documentation****: All scoring, clarifications, and final decisions should be thoroughly documented to ensure transparency.

Confidentiality:

The evaluation process is confidential. Evaluators should not disclose scores or bid information to any unauthorized party.

Conflict of Interest:

Panel members must disclose any potential conflicts of interest prior to the evaluation process. Any conflicts should be managed in accordance with the procurement policy to ensure fairness and impartiality.

This Tender Scoring Matrix Standards Document ensures that all evaluations are carried out consistently, objectively, and transparently across all procurement processes.