Sample Evaluation Report

## Document control sheet

|  |  |  |  |
| --- | --- | --- | --- |
| Version No. | Date | Changed by | Nature of Amendment |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

## Related Documents

|  |  |  |  |
| --- | --- | --- | --- |
| Document | Author | Procurement Delegate | Approval Date |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

## Endorsement Procurement Delegate

|  |  |  |
| --- | --- | --- |
| As a Procurement Delegate with the appropriate level of delegation, I am satisfied that:   * this request meets the requirements of the *[insert sate or agency]* procurement procedures * the evaluation was conducted in accordance with the associated and approved *[insert names of any invitation documents or evulation plans]* * probity, transparency, accountability was monitored and maintained throughout the evaluation process * the recommended Proponent/s will provide value for money for the department and has considered the objectives of the *[insert sate or agency]* Procurement Policy.   I am aware of my responsibilities under the probity and accountability provisions of the *[insert sate or agency]* Procurement Policy and I acknowledge that I am accountable for this decision. | | |
| Name: |  | |
| Position title: |  | |
| Extra position info: |  | |
| Delegation level: |  | |
| Signature: |  | Date: DD/MM/YYYY |

## Probity Advisor Endorsement

|  |  |  |
| --- | --- | --- |
| Name: | Signature: | Date: |
|  |  |  |

*[As an alterantive to this box above, you can attach a probity statement from an independent probity advisor as an appendix or attachment.]*

## Endorsement Panel Members

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Name | | Signature | Date | |
|  | |  |  | |
| Responsibilities of Panel Members | | | | |
| The Panel Members are responsible for but not limited to:   * endorsing content and recommendations of this Evaluation Report * ensuring all evaluation material is held in a secure location at all times * evaluating all offers in accordance with the Evaluation Plan and documenting all outcomes in this Evaluation Report * maintaining the highest standards of probity, transparency and official conduct * assisting the Panel Chair with the compilation of the final Evaluation Report | | | | |
| Panel Member Name | Position Title | | Signature | Date |
|  |  | |  |  |
|  |  | |  |  |
|  |  | |  |  |
|  |  | |  |  |
|  |  | |  |  |

## Approval Panel Chair

|  |  |  |
| --- | --- | --- |
| Responsibilities of Panel Chair | | |
| The Panel Chair is responsible for:   * completion, seeking endorsement and approving content of this Evaluation Report ensuring value for money was achieved * chairing all meetings of the Evaluation Panel * monitoring and actioned any conflict of interests which occurred throughout the evaluation * seeking expertise from other sources on matters relevant to evaluation deliberations (where required) * evaluating all offers in accordance with the Evaluation Plan and documenting all outcomes in this Evaluation Report * addressing any challenges to the evaluation process * maintaining the highest standards of probity, transparency and official conduct. | | |
| Name: |  | |
| Position Title: |  | |
| Department: |  | |
| Signature: |  | Date: |

## Table of contents

TABLE OF CONTENTS

BACKGROUND AND CONTEXT

1.1  Background

1.2  Objectives of the early market research

1.3. Market research process

*[add/edit as required]*

EVALUATION PROCESS

2.1 Outline of process

2.2 Any clarifications from Suppliers/Vendors

*[add/edit as required]*

EVALUATION OF OFFERS

3.1 Evaluation Criteria

3.2 Value for money assessment

3.3 Evaluation summary

*[add/edit as required]*

COMMENT

4.1 Outcomes

4.2 Learnings from the process

4.3 Determining next steps

*[add/edit as required]*

RECOMMENDATIONS

*[add/edit as required]*

TABLE OF CONTENTS

BACKGROUND AND CONTEXT

**1.1  Background**

**1.2  Objectives of the early market research**

**1.3. Market Research process**

*Include documents used for record keeping and stakeholders or consultants used.*

## EVALUATION PROCESS

**2.1 Outline of process**

*Include the steps taken, and any stakeholders or consultants involved at each stage.*

**2.2 Any clarifications from Suppliers/Vendors**

*Include any questions / FAQs that were sent or communicated to suppliers.*

## EVALUATION OF OFFERS (repeat steps 3.1 – 3.3 if there were several stages)

**3.1 Evaluation Criteria**

*Add a screenshot of the Evaluation Criteria table.*

**3.2 Value for money assessment**

*Pricing information may not be available from all vendors/suppliers, especially those where solutions were still conceptual and not in-production.*

*If any costs were established, evaluate the value for money assessment here, or in a separate document, then add in the summary here.*

**3.3 Evaluation summary**

* *Rank the vendors if suitable.*
* *Add a screenshot of the evaluation summary sheet/report.*

## COMMENT

**4.1 Outcomes**

*Overview of outcomes*

**4.2 Learnings from the process**

*Guiding questions:*

* *Did the process reach outcomes planned?*
* *What was learnt that can be applied to the program?*
* *Was there a suitable framework through which you have reviewed current and emerging offerings on the market?*
* *Did the process provide an opportunity for direct engagement with vendors/suppliers to test the requirement, test assumptions and identify gaps?*

**4.3 Determining next steps**

*Example options:*

* *Do nothing*
* *Conduct PoC (Proof of Concept)*
* *Conduct trial / pilot*
* *Procure and implement*
* *Engage supplier(s) for partnership discussions to explore co-design and further development opportunities*

## RECOMMENDATIONS

*You can make multiple recommendations based on 4.3 above.*