

Bid Evaluation Procedures

1. Purpose

To ensure bid evaluations (Technical and Price) are completed in accordance with the guiding principles for the procurement of goods and services for the University. *“The University requires that every individual involved in procurement and supply management processes apply the highest level of transparency, probity, professionalism and accountability in the procurement of goods, works and services and in the use of University funds” – USP General Procurement Policy.*

2. Scope

The procedure applies to **ALL Estates & Infrastructure assessments of bids**. This procedure is applicable to all bids (less than 5K) and RFQs (Less than 30K). For works greater than 30K, refer to USP’s procurement procedures.

Examples included but may not be limited to bid received using;

1. E-Quote System or Request for Quotations (RFQ) procedures,
2. Manually secured quotations (Email & in person); and
3. Where the quotations have been secured from Campuses or Schools or sections and sent to E & I Services for bid evaluation.

3. Procedure

Before the **evaluation process starts**, the Evaluator must secure the following;

- i. **Copy of the approved budget** for the works (including any approved contingencies). All awards must be checked against the approved available budget. This information should be included in the Job Card Request for Bid Evaluation and sourced from the Fund Controllers Approved Budget or Approved Space Application Form (depending on where the source of funding, i.e. Opex or Capex). (Refer to the sections Finance Officer for clarifications). For Campus, Schools or Sections requesting bid evaluation services, the Campus/School/Section Accountant or finance officer may be contacted to clarify budget allocations (Seek assistance from the E & I Finance Officer if not sure).
- ii. **Copy of the technical evaluation criteria. All technical evaluations must be undertaken in accordance with the approved evaluation criteria.** Technical evaluation criteria should have been approved prior to the release of the E-Quote/RFQ (Refer to approved E-Quote/RFQ release documentation – Manager Design/Director E & I Services Sign off).

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- iii. **Copy of the original pre-tender estimate.** All price bid evaluations must be assessed against the approved estimate for the works. This approved estimate is prepared by E & I Estimators or other competent authorities and approved by the Manager Design/Director E & I Services prior to the release of E-Quote/RFQ. Estimates undertaken by Campuses/Schools/Sections should have been forwarded to E & I Estimators and approved by the Manager Design/Director E & I Services prior to the release of E-Quotes/RFQs. See your supervisor if you are not sure.

Evaluation Procedure (Steps)

- i. **Technical evaluation as per the E-Quote/RFQ Technical Evaluation criteria.** All bidders must be listed in the evaluation sheet with points assigned as required and comments as necessary – This task is completed by the Estates & Infrastructure Services assigned **Project Supervisor/Project Manager**, which is then peer-reviewed and signed off by the immediate supervisor as a double check. For evaluations done directly by Campuses/Sections/Schools, a peer review and sign-off is required (Campus Director, Head of School or Section).
- ii. **Price Bid Evaluation** – Using the approved technical evaluation sheet from Step 1 above, input pricing ONLY from technically qualifying bidders.
 - a. **The Evaluator will** leave the technically non-qualified bidders on the evaluation sheet with the points and notes for their disqualification. The Evaluator will include any notes or recommendations for clarifications, as well as identified risks as appropriate for each bidder so the project supervisor/project manager/campus/school/section may consider in finalizing their determination for an award– **This process for price bid evaluations is done in ALL CASES by the Estates & Infrastructure Services Estimators and signed off by the Manager Design.**
- iii. **Seeking Clarifications/Confirmations** – As required, the process to seek clarifications/confirmations for technical or price submissions will be done for E-Quote/RFQ works less than 30K by the **Finance Officer**. For Campuses, Schools and Sections, it is recommended that their **Finance Officer contact the vendor** to seek these clarifications or confirmations as recommended in the evaluation sheet. (No other teams aside from the finance officers should be in contact with vendors in this regard).

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- iv. Finalizing an award** – The E & I Estimators will complete their evaluations, including any notes as required to the **Project Supervisor/Project Manager**, who will then make the nomination of the winning bidder. Where available, the job card system will be used to process an award and to document any quote waiver requests or special circumstances for particular awards. (Include comments in the approver comments columns with appropriate evidence uploaded on the system).

4. Responsibilities

Director Estates & Infrastructure/Manager Designs	–	Approve E-Quote/RFQ Evaluations & Awards
Project Supervisor/Project Manager	–	Technical evaluations and award determination
Estimators	–	Price Bid Evaluation evaluations
Finance Officer	–	Clarifications/Confirmations on funding and budgets.

5. Definitions

Equote	–	Electronic Quotation
RFQ	–	Request for Quotation

6. Reference Documents

Annual Plan
Budget
Space Form
Evaluation Sheet

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