

## Bid Evaluation Procedures

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### 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 60K. For works greater than 60K, 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, 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)**

#### **Step 1 Technical Evaluation – Points will ONLY be awarded according to the following scenarios.**

**Scenario 1:** 3 x relevant references provided **OR** similar works completed for USP within last 24 months **PLUS** Timeline for proposed works is within 30% of estimated completion time for the project = **50%**

**Scenario 2:** 3 x relevant references provided **OR** similar works completed for USP within last 24 months **HOWEVER** Timeline provided is outside of 30% of estimated work program = **25%** (subject to negotiations with L1 bidder on the timeline)

**Scenario 3:** None or less than 3x relevant references provided **AND** no work undertaken for USP within last 24 months, **REGARDLESS** of the work program provided = **0%** Bidder has provided a substantially non-compliant bid.

#### **Step 2 Price Evaluation – Points will ONLY be awarded according to the following scenarios.**

**Scenario 1:** Price Bid is verified with all line items accounted for **AND** the total price is within +- 20% of the estimate threshold = **50%**

**Scenario 2:** Price Bid is verified with all line items accounted for **HOWEVER** total **price is abnormally high** at greater than +20% of the estimate threshold = **25%** subject to negotiations on identified line item to maximize savings if bidder is identified as the L1 bidder.

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**Scenario 3:** Price Bid is verified with all line items accounted for **HOWEVER** total **price is abnormally low** being below the -20% of the estimate threshold = **25%** subject to identification of key risks to the quality of materials, methods of installations and timelines and subject to confirmation from the bidder that all costs have been included if the bidder is identified as the L1 bidder. (No adjustments to the total price is allowed) Otherwise 0%

**Scenario 4:** Price Bid is unclear, line **items are missed or not accounted for**, total price is within the 20% threshold = **25%** subject to identification of key risks to the quality of materials, methods of installations and timelines and subject to confirmation from the bidder that all costs have been included if the bidder is identified as the L1 bidder. (No adjustments to the total price is allowed) Otherwise 0%

**Scenario 5:** Price Bid is unclear, line items are missed or not accounted for, total price is outside of the 20% threshold = **0%** Bidder has provided a **substantially non-compliant bid**.

**Step 3** Identify the Outcome for the Tender Evaluation Committees deliberation and award.

**Outcome A - 100% Compliant bidders** – Consider the L1 Bidder

**Outcome B (Abnormal Work Program)** – 75% and 100% compliant Bidders – Consider the L1 bidder subject to negotiations and agreement on work program/timeline.

**Outcome C (Abnormally High L1 Bidder)** - 75% and 100% compliant Bidders – Consider the L1 bidder subject to negotiations on identified price items for abnormally high bids. Confirm Budget availability.

**Outcome D (Abnormally Low L1 Bidder)** - 75% and 100% compliant Bidders – Consider the L1 bidder subject to clarifications on price risks (Risks to Safety, Quality of Works and Timelines) – Abnormally low bidder

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**Outcome E (Unclear Priced L 1 Bidder)** - 75% and 100% compliant Bidders – Consider the L1 bidder subject to confirmation of missing or unclear price items included as part of the scope. (No adjustment to the total cost is allowed)

**Outcome F** – 50% and 0% **Substantially non-compliant bidders**- Consider re-running RFQ following review of scope and cost plan, timing of works and or selective tender.

### **Notes:**

1. All bidders must be listed in the evaluation sheet with points assigned in accordance with the Scenarios below with qualifying 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. For evaluations done directly by Campuses/Sections/Schools, a peer review and sign-off is required (Campus Director, Head of School, or Section).
2. **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).
3. **Finalizing an award** – The E & I Estimators/Campus Coordinators will complete their evaluations, including any notes as required to the **Project Supervisor/Project Manager (Works less than 30K) or to the Tender Evaluation Committee (works above 30K)**, 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 &

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		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**

- E-quote – Electronic Quotation
- RFQ – Request for Quotation

### **6. Reference Documents**

- Annual Plan
- Budget
- Space Form
- Evaluation Sheet

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