*Text Legend* *Delete this legend before finalising the document*

*Red text is an instruction and should be deleted after reading*

*Blue text should be edited or deleted as required.* *Change Blue text to Black if keeping*

*Black text should generally be considered as fixed text*

Evaluation Report

*[Goods and services procurement templates - Evaluation Report]*

Request Title:

[Insert Request Title]

Request Number:

[Insert Request Number]

State Agency:

[Insert State Agency Name]

**Approved by:**

*[for >$5m to be signed after STRC endorsement, as applicable]*

**\_\_\_\_ / \_\_\_\_ /202\_\_\_**

[Insert name of State Agency’s Authorised Officer]

[Insert Title]

State Tender Review Committee Endorsed Date: \_\_\_\_ / \_\_\_\_ /202\_\_\_

*[remove for <$5m or report has been exempted from submission to the STRC]*

Table of Contents

[1. Evaluation Summary 3](#_Toc170302802)

[2. Scope of Contract 6](#_Toc170302803)

[3. Procurement Development 7](#_Toc170302804)

[3.1 Summary 7](#_Toc170302805)

[4. The Evaluation 9](#_Toc170302806)

[4.1 Evaluation Panel Members 9](#_Toc170302807)

[4.1.1 Declaration of Interest and Confidentiality 9](#_Toc170302808)

[4.1.2 Probity Advisor or Probity Auditor 9](#_Toc170302809)

[4.2 Responses Received 10](#_Toc170302810)

[4.3 Desk Top Assessment 10](#_Toc170302811)

[4.4 [Initial] Qualitative Score and Price Summary Table 11](#_Toc170302812)

[4.4.1 Respondents Not Shortlisted 11](#_Toc170302813)

[4.5 Shortlisted Respondents Qualitative Score and Price Summary Table 11](#_Toc170302814)

[4.5.1 Further Evaluation Process 11](#_Toc170302815)

[4.5.2 Revised Qualitative Scores for Short-Listed Respondents 11](#_Toc170302816)

[5. Recommendation 13](#_Toc170302817)

[5.1 Basis 13](#_Toc170302818)

[5.2 Due Diligence 13](#_Toc170302819)

[5.3 Issues to be Resolved 14](#_Toc170302820)

[5.4 Competitive Neutrality 14](#_Toc170302821)

[6. Endorsement by Evaluation Panel 15](#_Toc170302822)

[Appendix A – Selection Requirements 16](#_Toc170302823)

[Appendix B – Evaluation Rating Scale 17](#_Toc170302824)

[Appendix C1 – [Initial] Qualitative Score & Price Summary 19](#_Toc170302825)

[Appendix C2 – Revised Qualitative Score for Shortlisted Respondents 21](#_Toc170302826)

[Appendix D – Comparative Statement 22](#_Toc170302827)

[Appendix E – WA Buy Local Policy 2022 and Western Australian Industry Participation Strategy 25](#_Toc170302828)

[Appendix F – Gender Equality in Procurement – Disclosure 28](#_Toc170302829)

[Appendix G – Risk Register 29](#_Toc170302830)

# Evaluation Summary

|  |  |
| --- | --- |
| **Item** | **Response** |
| **Contract Title:** | [Title] |
| **State Agency/Customer:** | [Name of State Agency/Customer] |
| **Scope:** | *[provide a brief overview of what is to be purchased/provided]*  See ‘**Scope of Contract**’ at **Section 2** for further information |
| **Contract Term:** | Head Agreement and Customer Contract *[Delete if no Head Agreement. If Customer Contract Term details are different from the Head Agreement Term details, edit and add further Term details for Customer Contract]*  Initial: [Term]  Extension options: [Options] |
| Recommended *or* Preferred Respondent(s): | [name of Recommended or Preferred Respondent(s)]  See ‘**Recommendation**’ at **Section 5** |
| **Estimated Total Contract Value *or* Total Contract Value: Pre-Tender Estimate:** | $[insert $ amount] (inc GST)  $[insert $ amount] (inc GST)  *[If the Price Variance is significant, please provide an explanation as to why this is the case.]*  *[Include and edit, as applicable, the following where the total contract value is an estimate.]*  The estimated total contract value is based on the price methodology used and may vary depending on *[actual contract usage or explain other or additional reasons that affect the estimated total contract value]*.  Notwithstanding this, the requirements of the Western Australian Procurement Rule E3.1 on publishing the number and value of contract variations and the actual expenditure under the contract, will be adhered to.  *or*  The estimated total contract value is based on the estimated expenditure at this time but may vary depending on budget availability.  Notwithstanding this, the requirements of the Western Australian Procurement Rule E3.1 on publishing the number and value of contract variations and the actual expenditure under the contract, will be adhered to. |
| **Price Variation:** | The Price is fixed for the Term.  *or*  The Price is fixed for the first year of the Term.  On each anniversary of the Commencement Date, the Price will be varied by the Consumer Price Index (Consumer Price Index, Australia (Cat No 6401.0): 1 All Groups, Index Numbers – Perth).  *or*  The Price is fixed for the first year of the Term.  The Price will be varied after the first year of the Term on [specify date] by [specify mechanism]. |
| **Eligible Regional Business?** | *[An Eligible Regional Business is a business that is located within the specified prescribed distance and meets all other eligibility criteria detailed within section 4.3 of the WA Buy Local Policy 2022]*  Yes / No *[or]* Not applicable - contract delivery location is within Perth Metropolitan Area  Refer ‘WA Buy Local Policy 2022’ at Appendix E |
| **Anticipated Contract Commencement Date:** | [Date] |
| **Issues to be Resolved?** | Yes / No  *[If “Yes” insert]* Refer ‘Issues to be Resolved’ at Section 5.3 |
| **Contract Management Plan?** | N/A  or  Yes  [Insert the name and title of the Authorised Officer who will approve the Plan]  or  An exemption will be sought under Rule E1 (2) or An exemption has been granted under Rule E1 (2)  [Insert the name and title of the Authorised Officer who will/has approve/approved the exemption]  [If an exemption has already been granted, insert the date of approval] |
| **Contract Manager or Position** | *[Insert name of Officer or position]* |
| **Buying Rules: *[Panel Contracts and CUA only]*** | [Insert explanation of buying rules] |
| **Small Business? (<20 people)** | Yes / No |
| **Registered Australian Disability Enterprise (ADE)?**  ***[If Yes, ensure the ADE is listed as an approved ADE on the Australian Disability Enterprises website at*** [***http://buyability.org.au/directory/***](http://buyability.org.au/directory/)***]*** | Yes / No |
| **Registered Aboriginal business?**  ***[If Yes, ensure the business is registered on the Aboriginal Business Directory WA at*** [***http://www.abdwa.com.au/***](http://www.abdwa.com.au/) ***and/or on Supply Nation Indigenous Business Direct at*** [***http://supplynation.org.au/***](http://supplynation.org.au/)***]*** | Yes / No  If Yes, business registered on:  Aboriginal Business Directory WA  Supply Nation’s Indigenous Business Direct  Both  Date verified: [enter date] |
| **Aboriginal Community Controlled Organisation (ACCO)?**  ***[If Yes, ensure that the ACCO has provided their ACNC registration and either their ORIC / ASIC / DEMIRS registration or their constitution / government documents extract]*** | Yes / No  If Yes, the ACCO provided:  ACNC registration, and  their ORIC, ASIC or DEMIRS registration, or  an extract of the relevant provisions of their constitution or governing documents |
| **Are any of the Respondents, or their subcontractors, debarred or suspended under the *Procurement (Debarment of Suppliers) Regulations 2021?*** | Yes / No  *[If “Yes” insert]* Refer **‘Desk Top Assessment’** at **Section 4.3** |
| **Gender Equality in Procurement** | Refer to **Appendix F – Gender Equality in Procurement – Disclosure** |
| **Aboriginal Procurement Policy – Aboriginal participation requirements**  *[Delete this row if the Aboriginal participation requirements were not applicable to the procurement]*  *[Further information about the application of the Aboriginal participation requirements is available in the* [*Aboriginal Procurement Policy Agency Practice Guide*](https://www.wa.gov.au/government/publications/general-procurement-direction-202108-aboriginal-procurement-policy) *on wa.gov.au.]* | *[Select one of the following options and edit as required. Delete the other options not required.]*  Neither of the Aboriginal participation requirements will be applicable – provide details  or  The Employment of Aboriginal Persons Outcomes target is applicable  Target Percentage: [2%, 5% or 10%] *[change if different target percentage negotiated]*  Reporting Frequency: Annually *[change if different reporting frequency required]*  or  The Aboriginal Business / ACCO Subcontracting Outcomes target is applicable  Target Percentage: [3%, 3.5% or 4%] *[change if different target percentage negotiated]*  Reporting Date: [contract expiry date] *[change if different reporting date required]* |

# Scope of Contract

*[provide summary / overview of the project]*

# Procurement Development

## Summary

|  |  |
| --- | --- |
| **Item** | **Response** |
| **Procurement Plan Prepared?** | N/A  or  Yes  Date endorsed by STRC: [date]  or  Yes but an exemption from submission to the State Tender Review Committee (STRC) has been granted under Rules C3 (3) (a) and F7 or Rule C3 (3) (b)  Date exemption approved by STRC or DDG Advisory Services, Department of Finance: [date]  *[If the process used in the Request process differed in any material respect from that in the Procurement Plan, whether it was submitted to the STRC or not, insert the following]*  The following were departures from the Procurement Plan:   * [insert changes and justify the changes. If there is not sufficient space, then include as an appendix] |
| **Risk Assessment:** | *[If no significant or high risks identified, insert]* All identified risks were rated as low *[or]* moderate.  *[If any identified risks were rated as significant or high, insert the following, selecting the applicable rating(s)]* Some identified risks were rated as significant and/or high. Refer ‘Risk Register’ at Appendix G. |
| **Selection Requirements:** | Refer to copy of Selection Requirements at **Appendix A** |
| **State Agency Approval to Proceed to Request:**  *[For cooperative procurement arrangements, list the names and titles of all the officers who agreed to the approval to proceed]* | Name: [name]  Title: [title] |
| Covered Procurement? | Yes and the Covered Procurement requirements have been complied with.  or  No  *For “No”, select one of the following options*  The value of the Procurement is below the Covered Procurement threshold.  or  The Procurement is an excluded Covered Procurement as identified in Appendix 3 of the Western Australian Procurement Rules under the category or measure or practice of [identify the category / measure / practice from Appendix 3 of the Procurement Rules].  *or*  The [name of State Agency] is not a Covered State Agency for the purposes of Free Trade Agreements as identified in Appendix 4 of the Western Australian Procurement Rules. |
| Exemptions and / or Approvals under the Western Australian Procurement Rules:  *[delete if not applicable, otherwise edit as applicable]* | The following exemptions and / or approvals have been granted for this Procurement by [Name and title of Authorised Officer] on [date].   * Rule C2.3 (2) – exemption to establish a contract term exceeding five years * Rule C5.2.A or B – exemption from appropriate procurement method * Rule D8.2 – exemption from the release of award details * Rule C2.2 (1) (c) – approval to use alternative arrangements instead of using the mandatory State Agency led Panel Arrangement (Standing Offer) * Rule C2.5 (1) – approval to establish a State-wide Panel Arrangement (Standing Offer) that is mandatory outside the Metropolitan region * Rule D2.4.A or B – approval to specify a Proprietary Product where no equivalent will be considered * Rule D4.1.B.6 – approval to reduce the minimum advertising time period to not less than 10 days for this Covered Procurement   The following exemptions and / or approvals have been granted for this Procurement by the Department of Finance on [date].   * Rules D7 (4) (a) and F7 or D7 (4) (b) – exemption from submitting the evaluation report to the STRC * Rule C2.2 (1) (b) (i) – approval to purchase outside of a mandatory Common Use Arrangement (CUA) * Rule C2.4 – approval to establish a multi-user cooperative procurement arrangement or a distributor model cooperative procurement arrangement as Authorised Bodies are participants or a group buying cooperative procurement arrangement as Authorised Bodies are participants |
| **Early Tender Advice:** | Yes *[or]* No  *[If “Yes” insert]*Posted on Tenders WA on [insert date] |
| **Advertising:** | Tenders WA: Yes / No Date: [insert date]  Newspaper: [name of newspaper & date advertised]  *[or if a direct source or limited source]*  Date released: [insert date] |
| Tender Briefing Details: | A [mandatory/non mandatory] tender briefing was held on [insert date] at [insert location]. |
| Addenda Details: | [insert number] addend[a/um] [were/was] released. In summary the addend[a/um]:   * [insert details and supporting reasons. If there is not sufficient space, then include as an appendix] |
| **Request Closing Date:** | [Request Closing Date] |
| **Offer Validity Expiry Date:** | [date] *[When does the offer validity date expire?]* |

# The Evaluation

## Evaluation Panel Members

|  |  |  |  |
| --- | --- | --- | --- |
| **Name** | **Job Title** | **Agency / Organisation** | **Role** |
| **Voting Members** | | | |
|  |  |  | Chairperson |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
| **Non-Voting Members** | | | |
|  |  |  | Facilitator |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

The contact details for the evaluation panel chairperson are: [insert contact details]. The contact details for the evaluation panel facilitator are: [insert contact details].

### Declaration of Interest and Confidentiality

All persons associated with the procurement process have completed a Declaration of Interest and Confidentiality form and, as applicable, declarations were made or reaffirmed, in writing, prior to the commencement of the evaluation process.

No interests were declared at evaluation or as applicable, in any previous declaration made. *or* The following interests were declared at evaluation and/or in any previous declaration made:

* [insert details].

These interests were addressed by:

* [insert details of the manner in which these interests were managed].

### Probity Advisor or Probity Auditor

*[If a probity advisor or auditor was engaged for this process, include details here, otherwise delete.]*

A probity advisor was engaged for this procurement process. The probity advisor was [insert the name of the advisor and company]. *[Summarise here, as applicable, any outcomes, issues, recommendations highlighted by the advisor]*.

or

A probity auditor was engaged for this procurement process. The probity auditor was [insert the name of the auditor and company]. *[Summarise here the audit findings and any other applicable details]*.

## Responses Received

Responses were received from the following organisations:

*[List in alphabetical order. Please ensure the name included below reflects the correct legal entity. If unsure, check the Australian Securities and Investment Commission website at http://www.asic.gov.au/ or the Australian Business Number website at http://abr.business.gov.au/].*

1. [Name] (location eg Perth, NSW...)
2. [Name] (location eg Perth, NSW...)
3. [Name] (location eg Perth, NSW...)
4. [Name] (location eg Perth, NSW...)

## Desk Top Assessment

*Unless operation of the Procurement (Debarment of Suppliers) Regulations 2021 has been excluded, the Contract Authority or Customer must exclude from consideration any Offer received from a Respondent who is suspended or debarred, and any Offer which includes a subcontracting arrangement with a suspended or debarred subcontractor. Refer to the* [*Western Australian Supplier Debarment Regime*](https://www.wa.gov.au/government/publications/debarment-regime-guide-western-australian-government-agencies) *and the* [*Excluded Suppliers*](https://www.tenders.wa.gov.au/watenders/news/browse.do?CSRFNONCE=BC47BF6C8B895C8C0C0CB75B4FF0C4AF&&ss=1) *page on Tenders WA for more information.*

*Ensure that you check the suspension and debarment status of all Respondents and named subcontractors on the* [*Excluded Suppliers*](https://www.tenders.wa.gov.au/watenders/news/browse.do?CSRFNONCE=BC47BF6C8B895C8C0C0CB75B4FF0C4AF&&ss=1) *page before progressing to the Qualitative Assessment, finalising this Evaluation Report and prior to awarding the contract.*

All Respondents [met the Pre-Qualification Requirements and] properly addressed the Compliance and Disclosure Requirements and were passed through to the Qualitative Assessment.

*or*

The following Respondents did not pass through to Qualitative Assessment*:* *[list names and reason why]*

1. [Name]  
   [Reason why]
2. [Name]  
   [Reason why]
3. [Name]  
   [Reason why]
4. [Name]  
   [Reason why]

All other Respondents [met the Pre-Qualification Requirements and] properly addressed the Compliance and Disclosure Requirements and were processed through to Qualitative Assessment.

## [Initial] Qualitative Score and Price Summary Table

*[If a two stage evaluation process was undertaken, insert the word 'initial' as indicated above, and include information relating to non-shortlisted respondents below.]*

*[List the Respondents in price or qualitative ranking order. This order should be consistent throughout the Report, ie as in Appendix C and in Appendix D.]*

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Respondent** | **Price Ranking** | **Price**  **(or Evaluated Price) (inc GST)** | **Qualitative Ranking** | **Score (%)** |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |

*[Any issues related to how the price schedule was devised should be discussed here – including use of estimated hours, estimated quantities, categories of work, goods.]*

*[Also, if Evaluated Price is used in the table above, explain the makeup of the Evaluated Price.]*

### Respondents Not Shortlisted

The following Respondents were not shortlisted:

1. [Name] [reason, price, qualitative score]
2. [Name] [reason, price, qualitative score]
3. [Name] [reason, price, qualitative score]
4. [Name] [reason, price, qualitative score]

Refer to **Appendix B** for a copy of the **Evaluation Rating Scale(s*)****[include Participation Plan scale as applicable]* used in the evaluation process.

Refer to **Appendix C** for a detailed “**Qualitative Score & Price Summary**” and **Appendix D** for the “**Comparative Statements**”.

## Shortlisted Respondents Qualitative Score and Price Summary Table

### Further Evaluation Process

After the initial evaluation, a number of shortlisted Respondents were selected to be further evaluated. The additional evaluation was undertaken as follows:

[detail process undertaken]

### Revised Qualitative Scores for Short-Listed Respondents

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Respondent | Price Ranking | Price (or Evaluated Price) (inc GST) | Qualitative Ranking | Score (%) |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |

# Recommendation

## Basis

[name of Respondent] is the evaluation panel’s recommended or preferred Respondent.

The basis for this decision is as follows:

1. Quality

[Discuss]

1. Price

[Discuss]

A settlement discount of [discount percentage]% will apply for payment made within [number of days] days of rendering of the account.

*[NB: If only one Respondent, explain how price was benchmarked (e.g. price compares favourably with price for a similar contract recently awarded either locally or in another State – provide details).]*

c). Summary

*[Include in this section justification for your value for money decision. Include, for example, why lower priced or comparatively higher scored offers were not recommended]*

In summary, [Name of Respondent] is best suited to meet the Request requirements and represents Value for Money.

## Due Diligence

*[Include in this section any due diligence undertaken. If no due diligence undertaken, give reasons]*

a). Referee Reports

The following table provides a summary of the referees contacted and their comments in relation to the recommended or preferred Respondent.

|  |  |
| --- | --- |
| **Referee Contact** | **Comment** |
| [Organisation and contact person] |  |
| [Organisation and contact person] |  |
| [Organisation and contact person] |  |

In summary, the referee reports supported the Evaluation Panel’s recommendation(s).

*[or]*

*[Provide further detail]*

b). Financial Due Diligence

*[Provide further detail]*

c). *[Insert detail of any other due diligence undertaken]*

## Issues to be Resolved

No issues to be resolved.

*or*

[State issues as applicable and provide detail]

## Competitive Neutrality

*[Delete if not applicable]*

The [name of tertiary institution or government organisation]provided a covering letter from the [title of the head of the institution / organisation] certifying that their Offer had been calculated on a full commercial basis and *[if appropriate]* verified by an independent expert.

# Endorsement by Evaluation Panel

|  |  |  |  |
| --- | --- | --- | --- |
|  | |  |  |
| [Insert Name] | [Insert Job Title] | Date | |
|  | |  |  |
| [Insert Name] | [Insert Job Title] | Date | |
|  | |  |  |
| [Insert Name] | [Insert Job Title] | Date | |
|  | |  |  |
| [Insert Name] | [Insert Job Title] | Date | |
|  | |  |  |
| [Insert Name] | [Insert Job Title] | Date | |

# Appendix A – Selection Requirements

# Pre-Qualification Requirements

There were no pre-qualification requirements for this Request.

or *[Delete the one that is not applicable]*

The pre-qualification requirements for this Request were:

# Compliance and Disclosure Requirements

The compliance and disclosure requirements for this Request were:

# Qualitative Requirements

The qualitative requirements for this Request were:

# Appendix B – Evaluation Rating Scale

A rating scale of 0-9 was used for evaluating each submission. Panel members were required to score each Respondent’s response to the qualitative requirements. The rating scale and a description for the range of scores is shown in the table below. Where the ‘Participation Plan’ was a separate qualitative requirement, panel members used the rating scale shown in the second table to score that qualitative requirement.

*[Delete the last sentence and the second table below if the Request did not include the Participation Plan qualitative requirement]*

|  |  |
| --- | --- |
| **Score** | **Description** |
| **0** | The response **does not** address the qualitative requirement  or  The evaluation panel is **not confident** that the Respondent:   * Understands the Request requirements covered by this qualitative requirement; and / or * Will be able to satisfactorily meet the Request requirements covered by this qualitative requirement. |
| **3** | The evaluation panel has **some reservations** whether the Respondent:   * Understands the Request requirements covered by this qualitative requirement; and / or * Will be able to satisfactorily complete the Request requirements covered by this qualitative requirement.   If **Minor** concern: rate higher (4).  If **Major** concern: rate lower (1 or 2). |
| **5** | The evaluation panel is **reasonably confident** that the Respondent   * Understands the Request requirements covered by this qualitative requirement; and / or * Will be able to satisfactorily complete the Request requirements covered by this qualitative requirement to a **reasonable** standard. |
| **6** | The evaluation panel is **confident** that the Respondent   * Understands the Request requirements covered by this qualitative requirement; and / or * Will be able to satisfactorily complete the Request requirements covered by this qualitative requirement to a **reasonable** standard. |
| **7** | The evaluation panel is **confident** that the Respondent:   * Understands the Request requirements covered by this qualitative requirement; and / or * Will be able to satisfactorily complete the Request requirements covered by this qualitative requirement to a **good** standard. |
| **8** | The evaluation panel is **confident** that the Respondent:   * Understands the Request requirements covered by this qualitative requirement; and / or * Will be able to satisfactorily complete the Request requirements covered by this qualitative requirement to a **high** standard. |
| **9** | The evaluation panel is **confident** that the Respondent:   * Understands the Request requirements covered by this qualitative requirement; and / or * Will be able to satisfactorily complete the Request requirements covered by this qualitative requirement to a **very high** standard. |

*[If the Request has the Participation Plan as a qualitative requirement include the rating scale table as shown below – if not, delete it.]*

The rating scale used to evaluate the Participation Plan qualitative requirement is shown below:

|  |  |
| --- | --- |
| **Score** | **Description** |
| **0** | The response **does not** contain sufficient information to make any assessment. |
| **1** | The evaluation panel is **not confident** that the potential supplier understands the requirements of the WAIPS.  **or**  The response **does not** contain sufficient information to demonstrate how the potential supplier will achieve WAIPS requirements. |
| **3** | The response offers **minimal** benefits in relation to the WAIPS.  **or**  The evaluation panel has **some reservations** as to whether the potential supplier will be able to satisfactorily meet WAIPS requirements. |
| **5** | The response offers a **reasonable or average** level of benefits in relation to the WAIPS.  **or**  The evaluation panel is **reasonably confident** that the potential supplier will be able to satisfactorily meet WAIPS requirements to a reasonable standard. |
| **7** | The response offers a **high or above average** level of benefits in relation to the WAIPS.  **and**  The evaluation panel is **confident** that the potential supplier will be able to satisfactorily meet the WAIPS requirements to a high standard. |
| **9** | The response offers a **very high** level of benefits in relation to the WAIPS.  **and**  The evaluation panel is **completely confident** that the potential supplier will be able to satisfactorily meet the WAIPS requirements to a very high standard. |

# Appendix C1 – [Initial] Qualitative Score & Price Summary

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Qualitative Requirement** | | **Weighting** | **Respondent A** | | | **Respondent B** | | | **Respondent C** | | | **Respondent D** | | | **Respondent E** | | |
|  |  |  | **Raw** | **Weighted** | | **Raw** | **Weighted** | | **Raw** | **Weighted** | | **Raw** | **Weighted** | | **Raw** | **Weighted** | |
|  |  |  | **/9** | **/9** | **%** | **/9** | **/9** | **%** | **/9** | **/9** | **%** | **/9** | **/9** | **%** | **/9** | **/9** | **%** |
| 1 | Understanding of the required tasks | X% |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| 2 | Organisational capacity | X% |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| 3 | Experience | X% |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| 4 | X | X% |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
|  | Total Weighted Score (%) |  |  | | |  | | |  | | |  | | |  | | |
|  | Qualitative Ranking |  |  | | |  | | |  | | |  | | |  | | |
|  | Price (inc GST) |  |  | | |  | | |  | | |  | | |  | | |
|  | Buy Local Preferences |  |  | | |  | | |  | | |  | | |  | | |
|  | Total Price (inc GST) |  |  | | |  | | |  | | |  | | |  | | |
|  | Price Ranking |  |  | | |  | | |  | | |  | | |  | | |

*When completing the table please note the following:*

* *If a two stage evaluation process was undertaken, insert the word ‘initial’ as indicated above.*
* *You may have to adapt the table where there are various prices – e.g. consultancy tenders, therefore, adjust where necessary.*
* *The table is on a landscape page and there is a section break between the table and the previous page – do not delete this, otherwise the pages will lose their formatting.*
* *Shade the three columns of the preferred or short-listed* Respondent (as applicable*)*
* *List the Respondents in price or qualitative ranking order. This order should be consistent throughout the Report, i.e. in the table at paragraph 4.4 and in Appendix D.*
* *Qualitative requirements to be listed in highest to lowest weighting.*
* *If the total Qualitative score has been ‘rounded’ please ensure that the rounded score is referred to throughout the rest of the Report*
* *Show Buy Local preferences that have been applied.*
* *If a two stage evaluation process was undertaken, the table below needs to be included – this table should contain the revised score of the shortlisted Respondents only.*

# Appendix C2 – Revised Qualitative Score for Shortlisted Respondents

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Qualitative Requirement** | | **Weighting** | **Respondent A** | | | **Respondent B** | | | **Respondent C** | | | **Respondent D** | | | **Respondent E** | | |
|  |  |  | **Raw** | **Weighted** | | **Raw** | **Weighted** | | **Raw** | **Weighted** | | **Raw** | **Weighted** | | **Raw** | **Weighted** | |
|  |  |  | **/9** | **/9** | **%** | **/9** | **/9** | **%** | **/9** | **/9** | **%** | **/9** | **/9** | **%** | **/9** | **/9** | **%** |
| 1 | Understanding of the required tasks | X% |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| 2 | Organisational capacity | X% |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| 3 | Experience | X% |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| 4 | X | X% |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
|  | Total Weighted Score (%) |  |  | | |  | | |  | | |  | | |  | | |
|  | Qualitative Ranking |  |  | | |  | | |  | | |  | | |  | | |
|  | Price (inc GST) |  |  | | |  | | |  | | |  | | |  | | |
|  | Buy Local Preferences |  |  | | |  | | |  | | |  | | |  | | |
|  | Total Price (inc GST) |  |  | | |  | | |  | | |  | | |  | | |
|  | Price Ranking |  |  | | |  | | |  | | |  | | |  | | |

# Appendix D – Comparative Statement

**Comparative Statement – Qualitative Requirements and Price**

A summary statement for each Respondent is provided below.

The summaries have been prepared for the purposes of providing feedback to Respondents and as a brief overview of the principal issues used by the evaluation panel to reach a decision. The summaries are not meant to cover all criteria and issues discussed by the evaluation panel.

*The respondents must be addressed in the same order (price or qualitative ranking) as in paragraph 4.4 and Appendix C.*

Stage One Evaluative Process*(Delete Title If No Shortlisting Was Undertaken)*

# Respondent's Name

* Total qualitative score [insert percentage]% – ranking [insert ranking]/X.
* Total price $[insert amount] (inc GST) – ranking [insert ranking]/X.

*[Insert Heading of Qualitative Requirement]*

* *Discussion of the response to a requirement.*
* *Include the evaluative statement from the evaluation rating scale that corresponds to the score given.*

*[Insert Heading of Qualitative Requirement]*

* *Discussion of the response to a requirement.*
* *Include the evaluative statement from the evaluation rating scale that corresponds to the score given.*
* Summary of price (competitive, expensive, etc).

**Outcome: [Not] Recommended *[or]* [Not] Shortlisted**

[include justification]

# Respondent's Name

* Total qualitative score [insert percentage]% – ranking [insert ranking]/X.
* Total price $[insert amount] (inc GST) – ranking [insert ranking]/X.

*[Insert Heading of Qualitative Requirement]*

* *Discussion of the response to a requirement.*
* *Include the evaluative statement from the evaluation rating scale that corresponds to the score given.*

*[Insert Heading of Qualitative Requirement]*

* *Discussion of the response to a requirement.*
* *Include the evaluative statement from the evaluation rating scale that corresponds to the score given.*
* Summary of price (competitive, expensive, etc).

**Outcome: [Not] Recommended *[or]* [Not] Shortlisted**

[include justification]

# Respondent's Name

* Total qualitative score [insert percentage]% – ranking [insert ranking]/X.
* Total price $[insert amount] (inc GST) – ranking [insert ranking]/X.

*[Insert Heading of Qualitative Requirement]*

* *Discussion of the response to a requirement.*
* *Include the evaluative statement from the evaluation rating scale that corresponds to the score given.*

*[Insert Heading of Qualitative Requirement]*

* *Discussion of the response to a requirement.*
* *Include the evaluative statement from the evaluation rating scale that corresponds to the score given.*
* Summary of price (competitive, expensive, etc).

**Outcome: [Not] Recommended *[or]* [Not] Shortlisted**

[include justification]

Stage Two Evaluative Process*(Delete Section If No Shortlisting Was Undertaken)*

# Respondent's Name

* Total revised qualitative score [insert percentage]% – ranking [insert ranking]/X.
* Total price $[insert amount] (inc GST) – ranking [insert ranking]/X.

*[Insert Heading of Qualitative Requirement]*

* *Discussion of the response to a requirement.*
* *Include the evaluative statement from the evaluation rating scale that corresponds to the score given.*

*[Insert Heading of Qualitative Requirement]*

* *Discussion of the response to a requirement.*
* *Include the evaluative statement from the evaluation rating scale that corresponds to the score given.*
* Summary of price (competitive, expensive, etc).

**Outcome: [Not] Recommended**

[include justification]

# Respondent's Name

* Total revised qualitative score [insert percentage]% – ranking [insert ranking]/X.
* Total price $[insert amount] (inc GST) – ranking [insert ranking]/X.

*[Insert Heading of Qualitative Requirement]*

* *Discussion of the response to a requirement.*
* *Include the evaluative statement from the evaluation rating scale that corresponds to the score given.*

*[Insert Heading of Qualitative Requirement]*

* *Discussion of the response to a requirement.*
* *Include the evaluative statement from the evaluation rating scale that corresponds to the score given.*
* Summary of price (competitive, expensive, etc).

**Outcome: [Not] Recommended**

[include justification]

# Appendix E – WA Buy Local Policy 2022 and Western Australian Industry Participation Strategy

1. Application of the Policy [or] Policies*[edit this section as required]*

The WA Buy Local Policy 2022 *[delete the following if not a WAIPS procurement]* and the Western Australian Industry Participation Strategy [has or have] been applied to this procurement as follows:

1. Consideration was given to the broader benefits to WA and the fulfilment of the government’s social and economic objectives when planning the procurement and making value for money procurement decisions;
2. Regional price preferences were applied*[only include if a regional contract delivery point]*;
3. Imported content impost was applied;*[Only include if there were imported content calculations made. The requirement to apply the imported content impost is not mandatory under the WA Buy Local Policy 2022.]* and
4. Participation Plan was a qualitative requirement with a weighting of [insert percentage]% [or] An exemption from the Participation Plan qualitative requirement was granted by the Minister for Jobs on the [insert date] *[only include if a WAIPS procurement]*.
5. Eligible Regional Business

Not applicable as contract delivery is within the Perth Metropolitan Area.

[or]

The following preferred/recommended Respondent(s) is/are eligible regional businesses for the purposes of the WA Buy Local Policy 2022.

1. [Insert regional business name], [insert location]

*[and/or]*

1. The following eligible regional business(es) were unsuccessful in the recommendation for the awarding of the contract:[Insert regional business name], [insert location]
2. [Insert regional business name], [insert location]

A summary of the reasons justifying this decision is shown in Section 5 of this report. As part of the procurement process, a comprehensive debriefing shall be made available to the unsuccessful Respondents upon request.

1. Imported Content***[Delete this section if the imported content questionnaire was not included in the Request]***

*[If no imported content]*Based on their submission, the recommended Respondent, in meeting the contract requirements, will not be utilising imported goods and/or services.

*[or if imported content]*The imported content, which the recommended Respondent will be using in meeting the contract requirements, is as follows:

1. [Insert imported good and/or service and associated value]
2. [Insert imported good and/or service and associated value]
3. Buy Local and Western Australian Industry Participation Benefits*[Edit this section as required]*

In selecting the recommended response, the WA Buy Local Policy 2022 and the Western Australian Industry Participation benefits can be summarised as follows:

1. *[for regional contracts]*They are a eligible regional business;
2. *[or for non-regional contracts]*They are a Western Australian business;
3. *[for regional contracts]*Maximising the use of regional suppliers / subcontractors;
4. The response to the Participation Plan qualitative criterion demonstrated a reasonable or better level of benefits in relation to the Western Australian Industry Participation Strategy;
5. Other – e.g. employment, skill development initiatives, employing Aboriginal People. *[N.B. Drafters are encouraged to consult the preferred/recommended respondent’s Participation Plan submission, if provided, for other benefits that could be noted in this section]*

|  |  |
| --- | --- |
| **Buy Local Reporting**  The below information is provided to assist State Agencies to gather Buy Local data | |
| *[The Buy Local Reporting table is:*   * *provided to record information necessary for completing the Buy Local questions on systems such as Tenders WA, and also to assist agencies to confirm the accuracy of Buy Local Reports at the end of each annual reporting period;* * *to be completed for each Request prior to the Evaluation Report being signed off;* * *designed to provide information for a single contract awarded to a single contractor. If there is more than 1 contract and/or 1 contractor, the table should be amended to suit.]* | |
| **Contract Title** | [Insert contract title] |
| **Request Number** | [Insert Request number] |
| **Contract Authority or Customer** | [Insert Contract Authority or Customer name] |
| **Total Contract Value** (including ext. options) | *[Insert total value for all contracts awarded under this Request number]*$[insert value] (inc GST) |

|  |  |
| --- | --- |
| ***[Copy and paste this table, or insert extra columns, for each contract and/or supplier]*** | **Contract [insert 1, 2, 3...]. Supplier:** **[insert name]** |
| **a) Is the Contractor a small business, employing less than 20 people?** | Yes *[or]* No |
| **b) What is/are the Contract Delivery Points** | [Insert Perth, Gascoyne, Goldfields- Esperance, Great Southern, Kimberley, Mid West, Peel, Pilbara, South West, and/or Wheatbelt] |
| **c) Value of Contract with this particular Contractor** (including ext. options) | *[Insert value of the individual contract with this supplier only if it is known. If this value is not known, eg a panel of suppliers without predetermined work allocated, leave this section blank]*$[insert value] (inc GST) |
| **d) Where is the Contractor located for the purposes of this contract?** | [Insert region (Perth, Gascoyne, Goldfields- Esperance, Great Southern, Kimberley, Mid West, Peel, Pilbara, South West, Wheatbelt) or leave blank if lcoation is outside WA]*,*  [Insert state (or country if located outside Australia)] |
| **e) Was the contract awarded to an eligible regional business located within the Contract Prescribed Distance? (Regional based contracts only)** | Yes *[or]* No *[or delete options and leave blank if not a regional contract delivery point]* |
| **f) Was a Regional Price Preference applied for evaluation purposes? (Regional based contracts only)**  **If yes, what was the total value of the regional price preference that was applied for evaluation purposes?** | Yes *[or]* No *[or delete options and leave blank if not a regional contract delivery point]*  A Regional Business *[or]* Content *[Delete Business or Content as applicable]* Preference of $[insert value] (inc GST) was applied. |
| **g) Was an imported content impost applied for evaluation purposes?**  **If yes, what was the total value of the regional price preference that was applied?** | Yes *[or]* No  $[insert value] (inc GST) |

# Appendix F – Gender Equality in Procurement – Disclosure

*[The Gender Equality in Procurement– Disclosure table below is:*

* *provided to record information necessary for completing the Gender Equality in Procurement disclosure requirements in Tenders WA (Gender Equality in Procurement)*
* *to be completed for each preferred/recommended Respondent prior to the evaluation report being signed off. Copy and paste the table where there is more than one preferred/recommended Respondent.*

*Delete optional rows where not applicable.]*

In accordance with [General Procurement Direction 2024/02 Gender Equality in Procurement](https://www.wa.gov.au/government/publications/general-procurement-direction-202402-gender-equality-procurement) the below disclosure details are for the preferred/recommended Respondent(s).

|  |  |  |
| --- | --- | --- |
| **[Insert preferred/recommended Respondent name]** | **Yes** | **No** |
| **The Respondent is a business or organisation that employs 100 or more people.** |  |  |
| *[Delete this row and the following rows if not applicable, i.e. if business/organisation employs less than 100 people]*Does the Respondent’s business comply with the Workplace Gender Equality Agency gender equality reporting requirements? |  |  |
| If no, did the Respondent provide reasons or explanation for doing so? |  |  |
| Has the Respondent attached a letter of compliance with the *Workplace Gender Equality Act 2012* (Cth)? |  |  |
| If no, did the Respondent provide reasons or explanation for doing so? |  |  |

# Appendix G – Risk Register

*[Insert a risk register here.*

*There is no single risk register or table that must be used in this section. The Risk Register provided in the Department of Finance ‘Risk Workbook’ template can be used, or any other risk register, table or other means of documenting risk.*

*As a minimum, this appendix should describe the risks identified, along with their ratings and treatment strategies employed.*

*The Appendix title can be edited as appropriate.]*