Purpose

To ensure that tenders are evaluated fairly and equitable in accordance with the evaluation criteria specified in the tender documentation.

Scope

This document sets out the procedures to be followed by all University staff involved in the evaluation of tenders.

Definitions

<table>
<thead>
<tr>
<th>FedUni</th>
<th>Federation University Australia</th>
</tr>
</thead>
</table>

Actions

The tender evaluation team is to comprise a minimum of 3 representatives; the FedUni representative / sponsor leading the tender plus two (2) others. It is highly recommended that a member of the Procurement team be on the evaluation panel.

Copies of all tender documentation, from evaluation through to contract must be forwarded to Procurement for input into the Contract Management System.

Tender evaluations should be fair and impartial and in accordance with the evaluation criteria as stated in the tender documentation and evaluation matrix.

The evaluation documentation must be carefully recorded to ensure integrity. There must be clear evidence that the process has been open, transparent, secure and confidential, whilst taking advantage of the competitive edge.
Care must be taken in the resolution of conflict of interest (all evaluation panel members with a potential conflict of interest should complete a Conflict of Interest Declaration form or remove themselves from the panel).

The following gives us guidance for evaluating the selection criteria as specified in the tender documents.

**Professional Competence**

**Compliance to Specifications**

Assess all tenders to ensure that they are complete and comply with all specification requirements. Vendors must demonstrate that they meet the evaluation criteria requirements.

**Capability / Capacity**

- **Staffing Structure** – Organisational chart.
- **Availability of experienced staff** – Evidence of qualifications, experience and a list of staff who will be working with FedUni in the supply of goods / services tendered for.
- **Experience in the Industry** – List of past / present contracts undertaken by the Tenderer’s organisation, supplying similar goods or services.

**Past Performance**

- **Referee’s view** – Referees must be contacted and their comments noted to form a part of the Evaluation Report.

**Customer Service**

- **Policy and Practice** – Look for evidence to support the tendering organisation’s understanding of customer service concepts documented in their submission.
- **Survey customers** – Look for evidence to support regular surveys have been undertaken in past / present contracts.
- **Systems to measure customer satisfactions** – Look for evidence to support tenderer has policies and procedures in place.

**Strategic**

- **Structural** – Check that there is documentation to support that tenderer has strategic development policies in place
- **Location** – Check that the tenderer or chosen sub-contractor is well located to provide goods / services tendered
- **Networking** – Check for evidence that networking / benchmarking has been undertaken

**Innovation**

- **Leading technology** – Check for evidence that Research and Development is regularly undertaken by tenderer.
- **Creativity** – Check if any valued added options over and above tender specifications have been offered with the tender submission.

**Commercial**
Financial Viability

Check for evidence that all financial requirements are met. The FedUni Finance Department can carry out finance checks if requested to do so.

Risk and Insurance

- **Adequate professional indemnity** – Check that a copy of Insurance Certificate has been included.
- **Adequate public liability** – Check that a copy of Insurance Certificate has been included.

Conflict of Interest

- **Existing or potential** – Check if evidence of conflict of interest has been documented.
- **Process for protection against Conflict of Interest** – Check that a process is in place.

*It is the tender sponsor’s responsibility to ensure that a Conflict of Interest declaration form is completed by all evaluation panel members prior to the evaluation being conducted.*

Financial

Pricing

- **Proposed price** – Consideration should not be given to decisions made wholly on the lowest price. Value for money should be the consideration.
- **Value for money** – Consider the quality of the proposed goods or services; whole life costs; risk, the capacity of the tender to deliver, on time, on budget; buying local.

Responsibilities

- [Delegations – Contract, Financial, Staffing and Tender Policy](#).
- [Procurement of Goods and Services Policy](#).
- [Probity Auditing Policy](#).

Associated Documents

- [Purchasing Procedure](#).
- [Approved Suppliers – E-Tendering for Obtaining Quotations and Conducting Tenders Guidelines](#).
- [Request for Quotation (RFQ) and Request for Tender (RFT) Guidelines](#).
- [Completion of a Vendor Application Form Guidelines](#).
- Request for Quotation (RFQ) and Request for Tender (RFT) Templates.
- ???.

Forms/Record Keeping
<table>
<thead>
<tr>
<th>Title</th>
<th>Location</th>
<th>Responsible Officer</th>
<th>Minimum Retention Period</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Endorsed Contractor Agreement</strong></td>
<td>Legal Services/Contract Database</td>
<td>Management Accountant, Strategic &amp; Procurement</td>
<td>7 years after contract has expired</td>
</tr>
<tr>
<td><strong>Preferred Supplier Agreement</strong></td>
<td>Legal Services/Contract Database</td>
<td>Management Accountant, Strategic &amp; Procurement</td>
<td>7 years after contract has expired</td>
</tr>
<tr>
<td><strong>Tender Evaluation Documentation</strong></td>
<td>Legal Services/Contract Database</td>
<td>Management Accountant, Strategic &amp; Procurement</td>
<td>7 years from day of last entry</td>
</tr>
</tbody>
</table>

**Implementation**

The [Tender Evaluation Guidelines](#) will be implemented throughout the University via:

1. an Announcement Notice under ‘FedNews’ on the ‘FedUni’ website and through the University Policy – ‘Recently Approved Documents’ webpage to alert the University-wide community of the approved Guidelines;
2. inclusion on the University’s online Policy Library; and
3. internal training sessions will be conducted for Procurement staff who will then advise University staff, as required.