



REPUBLIC OF GHANA

## STANDARD TENDER DOCUMENTS

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# **Standard Tender Evaluation Format**

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## **Selection Of Consultants**

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**Public Procurement Board**

**Accra, Ghana.**



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## Preface<sup>1</sup>

Procurement under projects financed from the Public Funds of the Republic of Ghana, is carried out in accordance with the procedures laid down in Part VI, Clause 70 – 72 of the Public Procurement Act, 2002 Act \_\_\_\_\_

This Standard Tender Evaluation Format for Selection of Consultants has been prepared for use by Procurement Entities in the application of the evaluation criteria in the Request for Proposal process. The procedures and practices they convey have been developed through broad international experience and are based principally on those developed and in use by the World Bank.

The document sets out the format of a sample evaluation report. It is mandatory for Procurement Entities to use in order to facilitate the evaluation of consultants' proposals and the subsequent review of these proposals by the relevant Tender Review Board. The evaluation must be in accordance with the criteria spelled out in the Request for Proposals and carried out by qualified evaluators. The Request for Proposals should be prepared in agreement with the provisions of the Public Procurement Act, 2002. The Technical Evaluation Report should be endorsed by the relevant Tender Review Board before the Financial Proposals are opened

Upon notification of contract award to the successful Consultant by the procurement Entity, and in accordance with the Public Procurement Act, 2002 the Public Procurement Board is authorized to publish a description of the contract, the name and nationality of the contract awardee, and the contract price in the Public Procurement Bulletin.

The evaluation report includes five sections:

- Section I. A Short Report Summarizing the Findings of the Technical Evaluation;
- Section II. Technical Evaluation Report—Forms;
- Section III. A Short Report Summarizing the Findings of the Financial Evaluation;
- Section IV. Financial Evaluation Report—Forms;
- Section V. Annexes:
  - Annex I. Individual Evaluations;
  - Annex II. Information Data Monitoring;
  - Annex III. Minutes of the Public Opening of the Financial Proposals;
  - Annex IV. Copy of the Request for Proposals;
  - Annex V. Miscellaneous Annexes—Ad Hoc.

The report can be used for all methods of selection described in the Public Procurement Act 2002. Though it mainly addresses Quality- and Cost-Based Selection, each section contains a note indicating the data and forms that are to be provided for the other methods of selection.

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<sup>1</sup> This preface is not part of the report. It should not appear in the report submitted to the Tender Review Board.

For complex, specialized assignments, Procurement Entities may wish to obtain assistance from consultants to evaluate proposals.

Additional information on Public Procurement in the Republic of Ghana can be obtained from:

Public Procurement Board

\_\_\_\_\_

\_\_\_\_\_

Accra, Ghana

Telephone: \_\_\_\_\_

Facsimile: \_\_\_\_\_

Email: \_\_\_\_\_

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## CONSULTANT EVALUATION REPORT

*Project Name* \_\_\_\_\_

*Title of Consulting Services* \_\_\_\_\_

*Date of Submission* \_\_\_\_\_



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## **Section II. Technical Evaluation Report—Forms<sup>3</sup>**

- Form IIA. Technical Evaluation—Basic Data
- Form IIB. Evaluation Summary—Technical Scores/Ranking
- Form IIC. Individual Evaluations—Comparison (Average Scores)

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<sup>3</sup> Section II applies to Quality- and Cost-Based Selection (QCBS), Quality-Based Selection (Quality-Based), Fixed-Budget Selection (Fixed-Budget), and Least-Cost Selection (Least-Cost). Supply appropriate data in cases of Selection Based on Qualifications (Qualifications) and Single-Source Selection (Single-Source) in Form IIA.

**Form IIA. Technical Evaluation - Basic Data**

2.1 Name of Project \_\_\_\_\_

2.2 Employer: \_\_\_\_\_

(a) name \_\_\_\_\_

(b) address, phone, facsimile, email \_\_\_\_\_

2.3 Type of assignment (pre-investment, preparation, or implementation), and brief description of sources  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

2.4 Method of selection<sup>4</sup>: QCBS \_\_\_\_ Quality-Based \_\_\_\_  
Fixed-Budget \_\_\_\_ Least-Cost \_\_\_\_  
Qualifications \_\_\_\_ Single-Source \_\_\_\_

2.5 Request for expressions of interest<sup>5</sup>:

(a) publication in Public Procurement Bulletin, national newspaper(s) Yes \_\_\_\_\_ No \_\_\_\_\_

(b) number of responses Yes \_\_\_\_\_ No \_\_\_\_\_

2.6 Shortlist:  
names/nationality of firms/associations (mark domestic firms and firms that had expressed interest)  
1. \_\_\_\_\_  
2. \_\_\_\_\_  
3. \_\_\_\_\_  
4. \_\_\_\_\_  
5. \_\_\_\_\_  
6. \_\_\_\_\_

2.6 (a) Date of RFP issuance to \_\_\_\_\_

<sup>4</sup> See Public Procurement Act.

<sup>5</sup> Required for large contracts (see Public Procurement Act).

- consultants: \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_
- 2.7 Amendments and clarifications to the RFP (describe) \_\_\_\_\_  
\_\_\_\_\_
- 2.8 Contract:
- (a) Standard Time-Based Yes \_\_\_\_\_  
Price adjustment: Yes \_\_\_\_\_ No \_\_\_\_\_
- (b) Standard Lump Sum Yes \_\_\_\_\_  
Price adjustment: Yes \_\_\_\_\_ No \_\_\_\_\_
- (c) other (describe) \_\_\_\_\_  
\_\_\_\_\_
- 2.9 Pre-proposal conference:
- (a) minutes issued Yes \_\_\_\_\_ No \_\_\_\_\_  
Yes \_\_\_\_\_ No \_\_\_\_\_
- 2.10 Proposal submission:
- (a) two envelopes (technical and financial proposals) Yes \_\_\_\_\_
- (b) one envelope (technical) Yes \_\_\_\_\_
- (c) original submission Date \_\_\_\_\_ Time \_\_\_\_\_
- (d) extensions(s) Date \_\_\_\_\_ Time \_\_\_\_\_
- 2.11 Submission of Financial Proposal Location \_\_\_\_\_
- 2.12 Opening of Technical Proposals by selection committee Date \_\_\_\_\_ Time \_\_\_\_\_
- 2.13 Number of proposals submitted \_\_\_\_\_
- 2.14 Evaluation committee<sup>6</sup>:  
Members' names and titles (normally three to five)
1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_
- 2.15 Proposal validity period (days):
- (a) original expiration date Date \_\_\_\_\_ Time \_\_\_\_\_
- (b) extension(s), if any Date \_\_\_\_\_ Time \_\_\_\_\_

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<sup>6</sup> It is important that evaluators be qualified.

2.16 Evaluation Criteria/subcriteria<sup>7</sup>:

(a) Consultants' experience	Weight _____
(i) _____	Weight _____
(ii) _____	
 (b) methodology	Weight _____
(i) _____	Weight _____
(ii) _____	
 (c) key staff	
(i) individual(s)	Weight _____
(A) _____	Weight _____
(B) _____	Weight _____
(C) _____	
(ii) group(s)	Weight _____
(A) _____	Weight _____
(B) _____	Weight _____
(C) _____	
 (d) training (optional)	Weight _____
(i) _____	Weight _____
(ii) _____	
 (e) local input (optional)	Weight _____
(i) _____	Weight _____
(ii) _____	

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<sup>7</sup> Maximum of three subcriteria per criterion.

2.17 Technical scores by Consultant Minimum qualifying score \_\_\_\_\_

Consultants' names	Technical scores
1. _____	_____
2. _____	_____
3. _____	_____
4. _____	_____

2.18 Evaluation report:

(a) submission to the Tender

Review Board for concurrent  
approval

Date \_\_\_\_\_

## Form IIB. Evaluation Summary

### Technical Scores/Ranking

Consultants' names	<i>[Insert name of Consultant 1]</i>	<i>[Insert name of Consultant 2]</i>	<i>[Insert name of Consultant 3]</i>	<i>[Insert name of Consultant 4]</i>
Criteria	Scores	Scores	Scores	Scores
Experience				
Methodology				
Proposed staff				
Training				
Local input				
<b>Total score<sup>a</sup></b>				
Rank				

a. Proposals scoring below the minimum qualifying score of *[number]* points have been rejected.

### Form IIC. Individual Evaluations—Comparison

Consultants' Names	<i>[Insert name of Consultant 1]</i>	<i>[Insert name of Consultant 2]</i>	<i>[Insert name of Consultant 3]</i>	<i>[Insert name of Consultant 4]</i>
Criteria Experience	A AV <sup>a</sup> C	B D		
Methodology				
Key staff				
Training				
Local input				
<b>Total</b>				

a. A, B, C, and D = scores given by evaluators; AV = average score, see Annex I(i).



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### **Section III. Financial Evaluation Report—Award Recommendation—Text<sup>8</sup>**

*[The text will indicate:*

- (a) any issues faced during the evaluation, such as difficulty in obtaining the exchange rates to convert the prices into the common currency used for evaluation purposes;*
- (b) adjustments made to the prices of the proposal(s) (mainly to ensure consistency with the technical proposal) and determination of the evaluated price (does not apply to Quality-Based (Quality-Based), Selection Based on Qualifications (Qualifications), and Single-Source Selection (Single-Source));*
- (c) tax-related problems;*
- (d) award recommendation; and*
- (e) any other important information.]*

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<sup>8</sup> Applies to QCBS, Fixed-Budget, and Least-Cost. For Quality-Based, Qualifications, and Single-Source provide relevant information as indicated.



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## **Section IV. Financial Evaluation Report—Award Recommendation—Forms<sup>9</sup>**

- Form IVA. Financial Evaluation—Basic Data
- Form IVB. Adjustments—Currency Conversion—Evaluated Prices
- Form IVC. QCBS—Combined Technical/Financial Evaluation—Award Recommendation
- Form IVD. Fixed-Budget and Least-Cost Selection—Award Recommendation

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<sup>9</sup> Applies to QCBS, Fixed-Budget, and Least-Cost. For Quality-Based, Qualifications, and Single-Source, provide relevant information as indicated.

### Form IVA. Financial Evaluation—Basic Data

- 4.1 Endorsement of technical evaluation report (Quality-Based, Qualifications, Single-Source) by Tender Review Board Date \_\_\_\_\_
- 4.2 Public opening of financial proposals Date \_\_\_\_\_ Time \_\_\_\_\_  
 (a) Names and proposal prices (mark Consultants that attended public opening)  
 1. \_\_\_\_\_  
 2. \_\_\_\_\_  
 3. \_\_\_\_\_  
 4. \_\_\_\_\_
- 4.3 Evaluation committee: members' names and titles (if not the same as in the technical evaluation - Quality-Based, Qualifications, Single-Source)  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_
- 4.4 Methodology (formula) for evaluation of cost (QCBS only; cross as appropriate)  
 Weight inversely proportional to cost \_\_\_\_\_  
 Other \_\_\_\_\_
- 4.5 Submission of final technical/financial evaluation report to the Tender review Board (Quality-Based, Qualifications, Single-Source) Date \_\_\_\_\_
- 4.6 QCBS  
 (a) Technical, financial and final scores (Quality-Based: technical scores only)
- | Consultant?<br>Name | Technical scores | Financial scores | Final scores |
|---------------------|------------------|------------------|--------------|
| _____               | _____            | _____            | _____        |
| _____               | _____            | _____            | _____        |
| _____               | _____            | _____            | _____        |
| _____               | _____            | _____            | _____        |
- (b) Award recommendation \_\_\_\_\_
- 4.7 Fixed Budget and Least-Cost  
 (a) Technical scores, proposal and evaluated prices
- | Consultant?<br>Name | Technical scores | Proposal prices | Evaluated prices |
|---------------------|------------------|-----------------|------------------|
| _____               | _____            | _____           | _____            |
| _____               | _____            | _____           | _____            |
| _____               | _____            | _____           | _____            |
| _____               | _____            | _____           | _____            |

- (b) Award recommendation \_\_\_\_\_
- (c) Fixed-Budget: best technical proposal within the budget (evaluated price) Name \_\_\_\_\_
- (d) Least-Cost: lowest evaluated price proposal above minimum qualifying score Name \_\_\_\_\_

**Form IVB. Adjustments—Currency Conversion—Evaluated Prices<sup>10</sup>**

Consultants' Names	Proposals' prices <sup>a</sup>		Adjustments <sup>b</sup>	Evaluated price(s)	Conversion to currency of evaluation <sup>c</sup>		Financial scores <sup>d</sup>
	Currency	Amounts (1)	(2)	(3) = (1) + (2)	Exchange rate(s) <sup>e</sup> (4)	Proposals' prices (5) = (3)(4)	(6)

- a. Comments, if any (e.g., exchange rates); three foreign currencies maximum, plus local currency.
- b. Arithmetical errors and omissions of items included in the technical proposals. Adjustments may be positive or negative.
- c. As per RFP.
- d. 100 points to the lowest evaluated proposal; other scores to be determined in accordance with provisions of RFP.
- e. Value of one currency unit in the common currency used for evaluation purposes (e.g., US\$1 = GHC8,000). Indicate source as per RFP.

<sup>10</sup> For Quality-Based, Qualifications, and Single-Source, fill out only up to column 3.

**Form IVC. QCBS—Combined Technical/Financial Evaluation—Award Recommendation**

Consultants' names	Technical Evaluation			Financial Evaluation		Combined Evaluation	
	Technical scores <sup>a</sup> S(t)	Weighted scores S(t) × T <sup>b</sup>	Technical rank	Financial scores <sup>c</sup> S(f)	Weighted scores S(f) × F <sup>d</sup>	Scores S(t) T + S(f) F	Rank
Award recommendation	To highest combined technical/financial score. Consultant's name: _____						

- a. See Form IIB.
- b. T = As per RFP.
- c. See Form IVB.
- d. F = as per RFP.

## Form IVD. Fixed-Budget and Least-Cost Selection—Award Recommendation<sup>11</sup>

Consultants' names	Fixed-Budget Selection		Least-Cost Selection	
	Technical scores <sup>a</sup>	Evaluated prices <sup>b</sup>	Technical scores	Evaluated prices
Award recommendation	To best technical score with evaluated price within budget. Consultant's name: _____		To lowest evaluated price above minimum qualifying score. Consultant's name: _____	

- a. See Form IIB.
- b. See Form IVB.

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<sup>11</sup> Fill in appropriate part of form.

## **Section V. Annexes<sup>12</sup>**

Annex I. Individual Evaluations

Form V Annex I(i). Individual Evaluations

Form V Annex I(ii). Individual Evaluations—Key Personnel

Annex II. Information Data Monitoring

Annex III. Minutes of Public Opening of Financial Proposals

Annex IV. Request for Proposals

Annex V. Miscellaneous Annexes—Ad Hoc

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<sup>12</sup> Annex I applies to Quality-Based, Fixed-Budget and Least-Cost. For Qualifications and Single-Source, it is replaced by a review of the strengths and weaknesses of the proposal, which may be amended by one or several evaluators.

### Annex I (i). Individual Evaluations

Consultant's name: \_\_\_\_\_

Criteria/Sub-Criteria	Maximum Scores	Evaluators					Average Scores
		1	2	3	4	5	
Experience							
-							
-							
-							
Methodology							
-							
-							
-							
Key Staff							
-							
-							
-							
Transfer of Knowledge (Training <sup>a</sup> )							
-							
-							
-							
Participation by Nationals <sup>a</sup>							
-							
-							
-							
<b>Total</b>	<b>100</b>						

a. If specified in the RFP

1. Evaluator's Name: \_\_\_\_\_ Signature: \_\_\_\_\_ Date: \_\_\_\_\_

2. Evaluator's Name: \_\_\_\_\_ Signature: \_\_\_\_\_ Date: \_\_\_\_\_

3. Evaluator's Name: \_\_\_\_\_ Signature: \_\_\_\_\_ Date: \_\_\_\_\_

4. Evaluator's Name: \_\_\_\_\_ Signature: \_\_\_\_\_ Date: \_\_\_\_\_

5. Evaluator's Name: \_\_\_\_\_ Signature: \_\_\_\_\_ Date: \_\_\_\_\_

### Annex I(ii) Individual Evaluations—Key Personnel

Consultant's Name: \_\_\_\_\_

Key Staff Names <sup>a</sup>	Maximum Scores	General Qualifications ( ) <sup>b</sup>	Adequacy for the Assignment ( ) <sup>b</sup>	Experience in Region ( ) <sup>b</sup>	Total Marks (100)	Scores
<b>Total</b>						

- a. Sometimes evaluations are made by groups instead of individuals. Each group (e.g. financial group) has a weight. The group score is obtained by the weighted scores of the members of the group. For example, the score of a group of three individuals scoring a, b, and c would be  $ax + by + cz$  with x, y, and z representing the respective weights of the members ( $x + y + z = 1$ ) in this group.
- b. Maximum marks as per RFP

Name of Evaluator: \_\_\_\_\_ Signature: \_\_\_\_\_ Date: \_\_\_\_\_

## Annex II. Information Data Monitoring

- 5.2 General Procurement Notice
- (a) first issue date \_\_\_\_\_
- (b) latest update \_\_\_\_\_
- 5.3 Request for expressions of interest<sup>13</sup>:
- (a) publication in Public Procurement Bulletin Date \_\_\_\_\_
- (b) publication in international and national local newspaper(s) of wide circulation Name of newspaper(s) and date(s) \_\_\_\_\_
- 5.4 Did the use of price as a factor of selection change the final ranking?<sup>14</sup> Yes \_\_\_\_\_ No \_\_\_\_\_
- 5.5 Did the use of “local input” as a factor of selection change the technical ranking?<sup>15</sup> Yes \_\_\_\_\_ No \_\_\_\_\_

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<sup>13</sup> Required for large contracts (*see Public Procurement Act*).

<sup>14</sup> Compare technical rank with rank in Form IVC.

<sup>15</sup> Figure out technical scores with and without “local input” (Form IIB).

### **Annex III. Minutes of Public Opening of Financial Proposals<sup>16</sup>**

#### MINUTES

*[The minutes should indicate the names of the participants in the proposal opening session, the proposal prices, discounts, technical scores, and any details that the Employer, at its discretion, may consider appropriate. All attendees must sign the Minutes.]*

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<sup>16</sup> Annex III applies to QCBS, Fixed-Budget, and Least-Cost.

## **Annex IV. Request for Proposals<sup>17</sup>**

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<sup>17</sup> Annex IV applies to all selection procedures (*The Public Procurement Board Standard Request for Proposals may be used for Qualifications and Single-Source, with appropriate modifications*).

## **Annex V. Miscellaneous Annexes—Ad Hoc**