

ANNEX VIII d

STANDARD FORMATS AND TEMPLATES

STANDARD BID EVALUATION FORMAT

FOR

**REQUEST FOR QUOTATIONS
(GOODS and WORKS)**

for

Limited/Selective Tendering Shopping

Preface

1. This standard quotation evaluation format for the procurement of Goods or Minor Works has been prepared for use by Procuring Entities in the application of the evaluation criteria in the Request for Quotations (RFQ) process, under the limited or selective tendering procedure. The processes and practices they convey have been developed through international best practice. The format can also be used for general support Services with the appropriate minor modifications.

2. The document sets out the format of a sample evaluation report. It is mandatory for Procuring Entities to use this format in order to facilitate the evaluation of Bidders' quotes and the subsequent review of these quotations by the relevant Tender Evaluation Committee. The evaluation must be in accordance with the criteria spelled out in the Request for Quotations and carried out by qualified evaluators.

3. The evaluation report is a simple document that need not be lengthy or wordy, but includes seven standard fill-in Forms and two Appendices. Guidance on how to use the Forms is indicated in italic text into brackets [].

BID EVALUATION REPORT

AND

RECOMMENDATION FOR AWARD OF CONTRACT

REQUEST FOR QUOTATIONS
(GOODS/MINOR WORKS)
(Shopping)

Procuring Entity Name: _____

Contract Name: _____

Contract Number: _____

Date of Submission: _____

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Form 1. Identification

1.1 RFQ #:	<u><i>[insert information]</i></u>
1.2 Name of Contract	<u><i>[insert information]</i></u>
1.3 Procuring Entity/Purchaser: (a) name (b) address	<u><i>[insert information]</i></u>
1.4 Contract number (identification)	<u><i>[insert information]</i></u>
1.5 Contract description	<u><i>[insert information]</i></u>
1.6 Cost estimate	<u><i>[insert information]</i></u> <u><i>[attach procurement plan]</i></u>
1.7 Method of procurement <i>[check one]</i>	Limited Shopping _____ Selective Shopping _____
1.8 Fixed price Contract	Yes / No

Form 2. Bidding Process

<p>2.1 Procurement Notice: (a) name of national newspaper (b) issue date (c) name of Government of Belize website (d) issue date (e) number of Firms notified</p>	<p><u><i>[insert information where relevant]</i></u> <u><i>[attach notice copy, if any]</i></u></p>
<p>2.2 Pre-qualification, if required: (a) number of Firms pre-qualified (b) date of Tenders Committee approval</p>	<p><u><i>[attach list of Firms]</i></u> <u><i>[attach Letter of approval]</i></u></p>
<p>2.3 Standard RFQ Document: (a) title, publication date (b) date of Tenders Committee approval (c) date of issue to Bidders</p>	<p><u><i>[insert information]</i></u> <u><i>[attach notice copy]</i></u></p>
<p>2.4 Number of Firms issued documents</p>	<p><u><i>insert information]</i></u></p>
<p>2.5 Amendments to documents, if any (a) list all issue dates</p>	<p>N.A 1. _____ 2. _____ 3. _____</p>

Form 3. Quotation Submission and Opening

3.1 Quotation submission deadline: (a) original date, time (b) extensions, if any	<u><i>[insert information]</i></u>
3.2 Quotation opening date, time	<u><i>[insert information]</i></u>
3.3 Record of bid opening	<u><i>[attach record]</i></u>
3.4 Number of quotations submitted	<u><i>[insert information]</i></u>
3.5 Quotation validity period (days): (a) originally specified (b) extensions, if any	<u><i>[insert information]</i></u> <u><i>[insert notice if any]</i></u>
3.6 Submission of Bid and Performance Securing Declaration	Yes _____ No _____ <u><i>[attach copy]</i></u>

Form 4. Bid Prices (as Read Out [delete if no public opening])

Name of Bidder	Read Out Bid Price (by Lot if more than one Lot)			Bid Securing Declaration	Modifications Discounts	Remarks
	Lot 1	Lot 2	Lot 3			
<i>Bidder 1</i>	<i>Amount</i>			Yes/No		
<i>Bidder 2</i>				Yes/No		
<i>Bidder 3</i>				Yes/No		

Form 5. Preliminary Examination

Bidder <i>(a)</i>	Verification <i>(b)</i>	Eligibility <i>(c)</i>	Bid Securing Declaration <i>(d)</i>	Completeness of Bid <i>(e)</i>	Substantial Responsiveness <i>(f)</i>	Acceptance for Detailed Examination <i>(g)</i>
Bidder 1	Yes/No	Yes/No	Yes/No	Yes/No	Yes/No	Yes/No

Form 7. Proposed Contract Award

<p>7.1 Lowest evaluated responsive Bidder (proposed for contract award):</p> <p style="padding-left: 40px;">(a) name</p> <p style="padding-left: 40px;">(b) address</p>	<p><u><i>[insert information]</i></u></p>
<p>7.2 If bid submitted by agent, list actual Supplier:</p> <p style="padding-left: 40px;">(a) name</p> <p style="padding-left: 40px;">(b) address</p>	<p><u><i>[insert information]</i></u></p>
<p>7.3 If bid from joint venture, list all partners, and estimated shares of contract.</p>	<p><u><i>[insert information]</i></u></p>
<p>7.4 Estimated date (month, year) of contract signing.</p>	<p><u><i>[insert information]</i></u></p>
<p>7.5 Estimated delivery to site/completion period.</p>	<p><u><i>[insert information]</i></u></p>
<p>7.6 Bid Price(s) (Read-out <i>[if applicable]</i>)</p>	<p><u><i>[insert information]</i></u></p>
<p>7.7 Corrections for Errors</p>	<p><u><i>[insert information]</i></u></p>
<p>7.8 Discounts</p>	<p><u><i>[insert information]</i></u></p>
<p>7.9 Other Adjustments</p>	<p><u><i>[insert information]</i></u></p>
<p>7.10 Proposed Award</p>	<p><u><i>[insert information]</i></u></p>

Appendix 1: Statement on Ethical Conduct and Fraud and Corruption

We the undersigned confirm that:

1. During the procurement process and the evaluation of bids and proposals, that we have adhered to the ethical standards set out in the Government of Belize's Public Procurement Procedures Handbook for Goods, Works and Services.
2. We have gained in the execution of our duties, no benefit either monetary or in kind from any outside agency, bidder or consultant other than the official remuneration that we have received as public servants.
3. To the best of our knowledge that no colleague, associate or relative has received any benefit monetary or in kind from any outside agency, bidder or consultant other than official remuneration.
4. We are unaware of any fraudulent, corrupt, collusive or coercive practices that have taken place during this procurement process and fully understand our moral and ethical obligation to report such should we be aware of it.
5. No conflict of interest exists either on our part or the part of the bidder or consultant recommended for an award of contract, or as far as we are aware the part of our immediate colleagues, associates and relatives.

Name	Position	Signature	Date

Appendix 2. Bid Evaluation Summary Checklist

1. Attach bid/quotation opening record, if not previously submitted.
2. Explain any inconsistencies between prices and modifications to prices read out at bid/quotation opening (and written into the record).
3. Provide details on eliminating any bids/quotation during preliminary examination. Selected pages from bids/quotations should be copied, as desirable, to show examples of objectionable features.
4. If provisional sums vary among bidders, explain. Explain any substantial corrections for computational errors that may affect the ranking of bidders.
5. The additions, adjustments, and priced deviations require detailed explanations where they may affect the ranking of bidders.
6. Explain any cross-discount read out and recorded at bid/quotation opening. In addition, attach copies of any evaluation reports for the other related contracts awarded to the same bidder.
7. Provide detailed reasons for refusing to award a contract to a party other than the lowest evaluated cost bidder.
8. If an alternative bid is accepted, provide a detailed explanation of the reasons for its acceptance, addressing issues of timeliness, performance, and cost implications.
9. Attach copies of any correspondence from bidders that raise objections to the bidding and evaluation process, together with detailed responses.
10. Attach copies of any letters to bidders requesting clarifications. Provide copies of responses.
11. Ensure that the bid/quotation evaluation report is double-checked, paginated, and complete, and includes a Letter of Transmittal to the Tenders Committee.