

Guidance on how to complete the Bid Evaluation Document

Purpose:

The Bid Evaluation Document (BED) forms part of the University Procurement Policy and Financial Regulations and is required to meet the University's obligation to deliver value for money and provide clear accountability for all procurement decisions.

The BED form must be completed prior to any purchase (or series of purchases / contract with the same supplier) where the total spend is greater than £10,000 and below £40,000 including VAT. (£100k for Estates works).

Any goods, services, works delivered prior to obtaining approval is a breach of University Financial Regulations and may ultimately result in disciplinary action and the withdrawal of authority to incur expenditure.

When and how to use the BED form:

The BED form covers all non-pay spend / purchases, whether for goods or services, contracts for building works, maintenance contracts, or lease/HP purchases, unless specifically exempted by the Head of Procurement. Failure to appropriately complete and/or submit a BED form will result in delay of approvals and the subsequent production of the Agresso Purchase Order (PO).

Before you send out any invitations to suppliers to provide quotations (or tenders) you should ensure that you are clear as to the basis on which you will make your selection of supplier. You should structure your statement of requirement / specification to include the evaluation criteria you intend to use. You will need to enter these on the BED form.

If you are seeking a single quotation (i.e. from **one** supplier only) and the supplier does not currently have a valid contract with the University (if in doubt please contact the [Procurement team](#)) you will need to complete a Single Action Waiver, available [here](#). Please read the associated guidance before submitted a Single Action Waiver as it may only be used in limited circumstances.

When purchasing goods or services from a supplier already contracted (via the Procurement team) to the University of Bath, it is **NOT** necessary to seek additional quotations. Please visit the [Procurement web pages](#) for details of existing contracted suppliers.

Approval process:

The BED form must be submitted to the Procurement Category Management team (category.management@bath.ac.uk) for review.

All BED forms will then automatically workflow within Agresso for additional review by the Head of Procurement, Head of Management Accounting and the Director of Finance prior to conversion to a Purchase Order (PO) and contractual commitment being made with the supplier.

Completing the form:

1. Enter the name of the person who will be using the goods or services and who has identified the need for the purchase.
2. Provide a telephone extension for this person, so that the Procurement team can contact them if there is any query.
3. Provide the person's Department.
4. Provide the name of the person entering the requisition in Agresso.
5. Provide the User ID of the person entering the requisition in Agresso.
6. Enter the Agresso requisition number.
7. Provide a description of the goods / services required, and where relevant attach a copy of the specification, and/or a copy of the email identifying /describing the requirement.
8. Enter the number of tenders/quotations sought. **THIS MUST BE A MINIMUM OF 3.**
9. Enter the number of tenders / quotations received by the deadline given.
10. Enter the evaluation criteria on which the supplier selection decision will be made (as published to the suppliers/tenderers) in column (a).

Setting evaluation criteria and scoring bids:

Evaluation criteria will typically include:

- (i) Price (e.g. Whole Life Cost / Total Price),
- (ii) Technical (e.g. conformance to specification),
- (iii) Quality (e.g. After Sales Service, Maintenance requirements) and
- (iv) Environmental and Social aspects (as appropriate).

Weight the criteria as appropriate in column (b) i.e. Use a % weighting factor to ascribe an importance to the evaluation criteria using a total weighting of 100%.

Example: If the most important thing is Price this could be given a weighting of 80% (out of 100%). If Technical requirements are the next most important criteria this could be given a lower weighting of 10%, and so on until all evaluation criteria have been allocated an appropriate weighting that relates to the importance of the overall purchase.

If you are using a conformance specification or procuring an 'off-the-shelf' product then consideration should be given to allocating a high weighting to 'price'.

If price is given a weighting of 50% or less the Procurement Team will require detailed justification to support this decision. (Please provide details under section 11c.)

Enter the tenderers/bidders names in the column spaces provided in 10 (c).

Scoring evaluation criteria (non-price):

The non-price evaluation criteria for each bid are scored on a scale of 0-5. Enter the appropriate score for each supplier against each evaluation criteria.

The following provides an example of how to apply scores within the 0-5 scale:

- 0= no response given
- 1= response significantly unsatisfactory / a number of major concerns
- 2= response unsatisfactory / minor concerns / few major concerns
- 3= response has some minor concerns
- 4= response fully meets requirements with no reservations
- 5= response meets requirements and demonstrates added value/ innovation

11. Price - enter the total bid price (in £'s exclusive of VAT) from each supplier in the appropriate column. This should be equal to the total value of the Agresso requisition(s) that will be placed for the requirement. Please note: requisition value is shown as Net of VAT on Agresso. The VAT rate is set at 20%, this can be changed if purchasing a commodity at a different rate. The Total Price inclusive of VAT will automatically populate on the final line.

Where relevant, the financial evaluation of tenders / quotations can be compared on a Whole Life Cost basis with consideration given to costs subsidiary to the main purchase such as:

- Import duty (& relief),
- Installation costs,
- Through life costs such as consumables, utilities and energy,
- Maintenance and / or support costs and
- Disposal costs.

- 11.d You must also clearly specify why you need to purchase the goods and/or services and detail the consequential impact to the University for not making the purchase.

12. Confirm whether the proposed purchase or series of purchases/contract include any of the following:

- (i) A Prepayment (payment prior to receipt of goods).
- (ii) Stage Payments (release of several payments at key stages).
- (iii) A lease or HP agreement. Please note: as per the University Financial regulations – UP3, lease / Hire Purchase (HP) agreements should NOT be entered into without the prior agreement of the Head of Procurement and the Director of Finance).
- (iv) Payment of Import or other Duty.

If YES i.e. one or more of the above applies to the purchase(s) please state which one(s), and provide details.

For leases/HP agreements include; the cash price, total rentals and finance cost (difference between the total rentals and cash price) and attach a copy of the proposed (draft) lease / HP agreement.

13. Enter your Name and Date.

14. Provide as an attachment any additional relevant information in support of your recommendation as detailed on the form above.

Submitting the form:

Submit the BED form together with all supporting information to the Procurement Category Management Team (category.management@bath.ac.uk).

- ***PLEASE NOTE: that by signing the BED form you confirm that this exercise has been conducted in line with the [University's Financial Regulations](#) and the [Procurement code of conduct](#) and that you are not aware of any conflicts of interest that may prevent or prejudice the decision of this procurement exercise.***

The following is taken from the University Financial Regulations with regard to conflicts of interest:

No member of the University nor employee shall take an active part in any discussions, negotiations or transactions involving the University in which they or their spouse, partner or any family member has an existing or potential, financial or other beneficial interest. If any circumstances arise where this may be the case, the member of staff shall be obliged to report to their Head of Department. They may proceed only with the approval in writing of the Vice-Chancellor.

No employee of the University shall, without the express written approval of the Vice-Chancellor take or hold any financial or any other beneficial interest in any commercial entity, whether incorporated or unincorporated, with which the University has, or may reasonably be expected to enter into, a commercial relationship. For the purposes of this regulation the term "entity" shall include a commercial activity by an individual acting as a sole trader. The term "interest" shall include any right or entitlement to share in the commercial profit/losses of such entity, other than by way of a shareholding in a public limited company listed on a recognised Stock Exchange.