



**ADAMAWA STATE BUREAU OF PUBLIC  
PROCUREMENT (ADSBPP)**

**EVALUATION REPORT FORM SELECTION OF  
CONSULTANTS**

**FOR**

**MDAs AND LOCAL  
GOVERNMENT COUNCIL**

## **SEPTEMBER 2014**

### **Preface!**

Consultants employed by a Procuring Entity (PE) and financed by Adamawa State Government are hired in accordance with the Adamawa State Public Procurement Bureau's Public Procurement (Consultancy) Regulations.

- (i) A technical evaluation report subject to prior review by ADSBPP, such as the ADSBPP's Certificate-of-Compliance prior to opening the financial proposals; or
- (ii) A technical evaluation notice for contracts above the prior review threshold but below a higher threshold. In such case, the PE needs not wait for the ADSBPP's Certificate-of-Compliance to open the financial proposals;

In both cases the PE must send to ADSBPP for prior review the combined technical/financial evaluation report;

- (b) For contracts subject to post-review by the Bureau (ADSBPP):

- (i) A combined technical/financial report to be reviewed or audited subsequently.

This document sets out the format of a sample evaluation report. It is provided to Procuring Entities to facilitate the evaluation of consultants' proposals and the subsequent review of these proposals by the ADSBPP. Its use is strongly recommended but not mandatory.

The evaluation must be in accordance with the criteria spelled out in the Request for Proposals (RFP) and carried out by qualified evaluators. The Request for Proposals should be prepared in agreement with the Guidelines.

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 Guidelines. 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.

The evaluation notice is sent to the ADSBPP after the technical evaluation is completed. It includes only Form IIB and a short explanatory note to flag important aspects of the evaluation. Following the ADSBPP's Certificate-of-Compliance to the evaluation notice, the Procuring Entity prepares Forms IVC and IVD and a short explanatory note to highlight the most important aspects of the financial evaluation.

Users of this sample evaluation report are invited to submit comments on their experience with the document to:

*Adamawa State Bureau of Public Procurement, State Secretariat Complex,  
Yola, Adamawa State*

# CONSULTANT EVALUATION REPORT

*Procuring Entity [insert: name of PE]*

*Project Name [insert: project name]*

*Title of Consulting Services [insert: title]*

*Date of Submission [insert: date]*



## Section I. Technical Evaluation Report-s-Text'

- 1. Background** Include a brief description, context, scope, and objectives of the services. Use about a quarter of a page.
  
- 2. The Selection** Elaborate on information provided in Form IIA.  
  
**Process (Prior to Technical Evaluation)** Describe briefly the selection process, beginning with the advertising (if required), the establishment of the shortlist, expressions of interest, and withdrawals of firms before proposal submissions.  
  
Describe major events that may have affected the timing (delays, complaints from consultants, key correspondence with the ADSBPP, Request for Proposals (RFP), extension of proposal submission date, and so on).  
  
Use about one-half to one page.
  
- 3. Technical Evaluation** Describe briefly the meetings and actions taken by the evaluation committee: formation of a technical evaluation team, outside assistance, evaluation guidelines, justification of sub-criteria and associated weightings as indicated in the Standard Request for Proposals; relevant correspondence with the ADSBPP; and compliance of evaluation with RFP.  
  
Present results of the technical evaluation: scores and the award recommendation.  
  
Highlight strengths and weaknesses of each proposal (most important part of the report).
  - (a) Strengths: Experience in very similar projects in the country; quality of the methodology, proving a clear understanding of the scope of the assignment; strengths of the local partner; and experience of proposed staff in similar assignments.
  - (b) Weaknesses: Of a particular component of the proposal; of a lack of experience in the country; of a low level of participation by the local partner; of a lack of practical experience (experience in studies rather than in implementation); of staff experience compared to the firm's experience; of a key staffer (e.g., the team leader); of a lack of responsiveness; and of disqualifications (conflict of interest).

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1. Section I applies to Quality- and Cost-Based Selection (QCBS), Quality-Based Selection (Quality-Based), Fixed-Budget Selection (Fixed-Budget), and Least-Cost Selection (Least-Cost). Provide appropriate information in the case of Selection Based on Qualifications (Qualifications) and Single-Source Selection (SS).

Comment on individual evaluators' scores (discrepancies).

Items requiring further negotiations.

Use up to three pages.

## **Section II. Technical Evaluation Report - Forms**

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

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3 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.





(b) ADSBPP's CoC

Date \_\_\_\_\_

(c) Issuance of Consultants

Date \_\_\_\_\_

2.9 Amendments and clarifications to the RFP (describe)

\_\_\_\_\_  
\_\_\_\_\_

2.10 Contract:

(a) ADSBPP Standard Time Based

Yes \_\_\_\_\_

Price adjustment: Yes \_\_\_\_\_ No \_\_\_\_\_

(b) ADSBPP Standard Lump Sum

Yes \_\_\_\_\_

Price adjustment: Yes \_\_\_\_\_ No \_\_\_\_\_

(c) Other (describe)

\_\_\_\_\_  
\_\_\_\_\_

2.11 Pre-proposal conference:

Yes \_\_\_\_\_ No \_\_\_\_\_

(a) Minutes issued

Yes \_\_\_\_\_ No \_\_\_\_\_

2.12 Proposal Submission:

(a) Two envelopes (technical and financial proposals)

Yes \_\_\_\_\_

(b) One envelop (technical)

Yes \_\_\_\_\_

(c) Original submission

Date \_\_\_\_\_ Time \_\_\_\_\_

(d) Extension(s)

Date \_\_\_\_\_ Time \_\_\_\_\_

2.13 Submission of Financial Proposal

Location \_\_\_\_\_

2.14 Opening of Technical Proposals by selection committee

Date \_\_\_\_\_ Time \_\_\_\_\_

2.15 Number of proposals submitted

\_\_\_\_\_

2.16 Evaluation Committee<sup>1</sup>:

Members name and titles

1. \_\_\_\_\_

(normally three to five)

2. \_\_\_\_\_

3. \_\_\_\_\_

4. \_\_\_\_\_

5. \_\_\_\_\_

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6 it is important that evaluators be qualified

2.17 Proposal validity period (days):

(a) Original expiration date

Date \_\_\_\_\_ Time \_\_\_\_\_

(b) Extension(s), if any

Date \_\_\_\_\_ Time \_\_\_\_\_

2.18 Evaluation Criteria/subcriteria<sup>1</sup>:

(a) Consultant's experience

(i) \_\_\_\_\_

Weight \_\_\_\_\_

(ii) \_\_\_\_\_

Weight \_\_\_\_\_

(b) Methodology

(i) \_\_\_\_\_

Weight \_\_\_\_\_

(ii) \_\_\_\_\_

Weight \_\_\_\_\_

(c) Key staff

(i) Individual(s)

(A) \_\_\_\_\_

Weight \_\_\_\_\_

(B) \_\_\_\_\_

Weight \_\_\_\_\_

(C) \_\_\_\_\_

Weight \_\_\_\_\_

(ii) Group(s)

(A) \_\_\_\_\_

Weight \_\_\_\_\_

(B) \_\_\_\_\_

Weight \_\_\_\_\_

(C) \_\_\_\_\_

Weight \_\_\_\_\_

(d) Training (optional)

(i) \_\_\_\_\_

Weight \_\_\_\_\_

(ii) \_\_\_\_\_

Weight \_\_\_\_\_

(e) Local input (optional)

(i) \_\_\_\_\_

Weight \_\_\_\_\_

(ii) \_\_\_\_\_

Weight \_\_\_\_\_

2.19 Technical scores by Consultants

Minimum qualifying score \_\_\_\_\_

Consultant's names	Technical scores
1. _____	_____
2. _____	_____
3. _____	_____
4. _____	_____

2.20 Evaluation Report:

(a) Submission to ADSBPP for No-Objection.

Date \_\_\_\_\_

2.21 Evaluation notice:

(a) Submission to ADSBPP

Date \_\_\_\_\_

**Form IIB. Evaluation Summary  
Technical Scores/Ranking**

	<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 Evaluation - Comparison**

<b>Consultants' Name</b>	<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	A	B		
Experience	AV <sup>a</sup>			
	C	D		
Methodology				
Proposed staff				
Training				
Local input				
<b>Total</b>				

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

**NOTE:**

*Please see the preface*

For contracts above a threshold requiring ADSBPP's Certificate of Compliance for the technical evaluation report, financial proposals must not be opened before the PE has received such Certificate-of-Compliance. The technical evaluation (technical scores in particular) cannot be changed following the opening of the financial proposals.

### **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) Adjustment made to the prices of the proposal(s) (mainly to ensure consistency with the technical proposal) and determinant on the evaluated price (does not apply to Quality – Based (Quality-Based), Selection Based on Qualifications (Qualifications), a Single-Source Selection (Single-Source));*
- (c) Tax-related problems*
- (d) Award recommendation; and*
- (e) Any other important information.*

*Taxes are not taken into account in the financial evaluation whereas reimbursable are.*

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8 Applies to QCBS, Fixed-Budget, and Least-Cost. For Qualifications, and Single-Source provide relevant information as indicated.



## **Section IV. Financial Evaluation Report – Award Recommendation – Form<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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9 Applies to QCBS, Fixed-Budget, and Least-Cost. For Qualifications, and Single-Source provide relevant information as indicated.

**Form IVA. Financial Evaluation – Basic Data**

- 4.1 ADSBPP’s Certificate of Compliance  
To technical evaluation report (Quality-Based, Qualifications, Single-Source)      Date \_\_\_\_\_
- 4.2 Public opening of financial proposals      Date \_\_\_\_\_ Time \_\_\_\_\_  
(a) Names and proposals prices      1. \_\_\_\_\_  
(mark consultants that attended      2. \_\_\_\_\_  
public opening).      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  
ADSBPP (Quality-Based,  
Qualifications, Single Source).      Date \_\_\_\_\_
- 4.6 QCBS      Consultant’      Technical      Financial      Final  
(a) Technical, financial and final      Name      scores      scores      Scores  
scores (Quality-Based:      \_\_\_\_\_      \_\_\_\_\_      \_\_\_\_\_      \_\_\_\_\_  
technical scores only      \_\_\_\_\_      \_\_\_\_\_      \_\_\_\_\_      \_\_\_\_\_  
      \_\_\_\_\_      \_\_\_\_\_      \_\_\_\_\_      \_\_\_\_\_
- (b) Award recommendation      \_\_\_\_\_
- 4.7 Fixed Budget and Least-Cost      Consultant’      Technical      Financial      Final  
(a) Technical scores, proposals      Name      scores      scores      Scores  
and 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>1</sup>**

Consultants' Names	Proposals' Prices		Adjustment (2)	Evaluated price(s) (3) (1) (2)	Conversion to currency of evaluation		Financial scores
	Currency	Amounts (1)			Exchange rate(s) (4)	Proposals prices (5) = (3) (4)	

- (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, normally the local currency (e.g. US\$1 = 30 rupees), indicate source as per RFP.

**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) x T <sup>b</sup>	Technical Rank	Financial Scores <sup>c</sup> S(f)	Weighted scores S(f) x F <sup>d</sup>	Scores S(t) Y + 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>1</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. Consultants' 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>1</sup> Fill in appropriate part of form.

## **Section V. Annexes**

- 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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1 Annex 1 applies to Quality-Based, Fixed-Budget and Least-Cost. For Quality 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 1(i). Individual Evaluations

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

	Maximum Scores	Evaluators					Average Scores
		1	2	3	4	5	
<b>Experience</b>							
-							
-							
-							
<b>Methodology</b>							
-							
-							
-							
<b>Key Staff</b>							
-							
-							
-							
<b>Transfer of knowledge (Training<sup>a</sup>)</b>							
-							
-							
-							
<b>Participation by National<sup>a</sup></b>							
-							
-							
-							
<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

- 5.1 Loan/credit/grant
- (a) Number \_\_\_\_\_
  - (b) Date of effectiveness \_\_\_\_\_
  - (c) Closing date \_\_\_\_\_
    - (i) Original \_\_\_\_\_
    - (ii) Revised \_\_\_\_\_
- 5.2 General Procurement Notice
- (a) First issue date \_\_\_\_\_
  - (b) Latest update \_\_\_\_\_
- 5.3 Request for expressions of interest<sup>1</sup>:
- (a) Publication in *ADSBPP website*  
Date \_\_\_\_\_
  - (b) Publication in national local newspaper(s)  
Name of newspaper(s) and date(s) \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
- 5.4 Did the use of price as a factor of Selection change the final ranking?<sup>2</sup> Yes \_\_\_\_\_ No \_\_\_\_\_
- 5.5 Did the use of “local input” as a Factor of selection change the Technical ranking?<sup>3</sup> Yes \_\_\_\_\_ No \_\_\_\_\_

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13 Required for large contracts (see guidelines).

14 Compare technical rank with rank in Form IVC.

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

## **Annex III. Minutes of Public Opening of Financial Proposals<sup>1</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 Client, at its discretion, may consider appropriate.*

*All attendees must sign the minutes.*

## **Annex IV. Request for Proposals<sup>1</sup>**

*A Standard Request for Proposals must be used for Adamawa State Government – financed contracts in excess of NGN 10 Million. ADSBPP also recommends the use of the Standard Request for Proposals document for smaller contracts to simplify its prior review (i.e. when the PE cannot issue the document without ADSBPP Certificate of Compliance).*

*The Standard Request for Proposals is available on ADSBPP's internet site and at the following address.*

*Adamawa State Bureau of Public Procurement, State Secretariat Complex,  
Yola, Adamawa State*

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17 Annex IV applies to all selection procedures (ADSBPP's Standard Request for Proposals may be used for Qualifications and Single-Source, with appropriate modifications).

**Annex V. Miscellaneous Annexes – Ad – Hoc**