

SAMPLE FORM OF EVALUATION REPORT

SELECTION OF CONSULTANTS

CONSULTANT EVALUATION REPORT

Project Name: Empanelment of Chartered Accountant Firm for Implementation of Accounting System

Date of Submission: 31st July 2018

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Section I. Technical Evaluation Report—Text¹

1. **Background** Include a brief description, context, scope, and objectives of the services. Use about a quarter of a page.

2. **The Selection Process (Prior to Technical Evaluation)** Elaborate on information provided in Form IIA.

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 Bank, 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 subcriteria and associated weightings as indicated in the Standard Request for Proposals; relevant correspondence with the Bank; 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

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).

responsiveness; and of disqualifications (conflict of interest).

Comment on individual evaluators' scores (discrepancies).

Items requiring further negotiations.

Use up to three pages.

Section II. Technical Evaluation Report—Forms²

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

² 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 Empanelment of Chartered Accountant Firm for Implementation of Accounting System
- 2.2 Client:
- (a) name Uttarakhand Peyjal Sansadhan Vikas Evam
Nirman Nigam,
- (b) address, phone, facsimile 102, Kyunkaleshwar, Kandolia Devprayag
Marg, Pauri (Garhwal) - 246001
- 2.3 Type of assignment (pre-investment, preparation, or implementation), and brief description of sources Empanelment/CA firms for implementation of Accounting system in computerized format (Tally Software, working experience on Microsoft also) for different Projects in under Superintending Engineer, of Utrakhand Peyjal Nigam (Garhwal Zone) and at Head Quarter, Utrakhand Peyjal Nigam, Dehradun.
- 2.4 Method of selection³: Least-Cost ____
- 2.5 Request for expressions of interest⁴:
- (a) publication in national newspaper(s) Yes _____ No _____
- (b) number of responses _____
- 2.6 Shortlist:
- (a) names/nationality of firms/associations (mark domestic firms and firms that had expressed interest)
1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
- 2.7 Request for Proposals:
- (a) issuance to Consultants Date _____

³ See *Guidelines*.

⁴ Required for large contracts (see *Guidelines*).

- 2.9 Amendments and clarifications to the RFP (describe) _____

- 2.10 Contract:
(a) other (describe) _____

- 2.11 Pre-proposal conference: Yes _____ No _____
(a) minutes issued
- 2.12 Proposal submission:
(a) two envelopes (technical and financial proposals) Yes _____
(b) original submission Date _____ Time _____
(c) extensions(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:
Members' names and titles (normally three to five) 1. _____
2. _____
3. _____
4. _____
5. _____
- 2.17 Proposal validity period (days):
(a) original expiration date Date _____ Time _____
(b) extension(s), if any Date _____ Time _____
- 2.18 Evaluation Criteria/sub criteria:
(a) Consultants' experience
(i) Registered/Empaneled with ICAI Weight 5%
(ii) First must have CA certificate having experience 3/5 yrs and 2 yrs for accountant Weight 10%

- (iii) Having Statutory Audit assignment experience with Govt Weight 10%
- (iv) Accountant having knowledge of Financial Handbook Weight 5% (having experience of any govt./psu organization)
- (v) qualified staff to work on Tally Software Weight 5%
- (vi) Annual Turnover Weight 5%
- (b) methodology
- (i) For Execution of Work Weight 10%
- (c) key staff
- (i) individual(s)
- (A) Team Leader(1No) Weight 15%
- a) Degree -5%
- b) Knowledge of Software -5%
- c) Experience -5%
- (B) Senior Accountant(1No) Weight 10%
- a) Qualification -3%
- b) Knowledge -3%
- c) Experience-4%
- (C) Accountant(4nos) Weight 20%
- a) Qualification -1%
- b) Knowledge -1%
- c) Experience -3%

Score Below 70% is not eligible to execute further.

2.19 Technical scores by Consultant Minimum qualifying score _____

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

2.20 Evaluation report:

(a) submission to the MD for 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				
Total score				
Rank				

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 C	B AV ^a D		
Methodology				
Key staff				
Total				

a. A, B, C, and D = scores given by evaluators; AV = average score

Section III. Financial Evaluation Report—Award Recommendation—Forms

Consultants' names	Least-Cost Selection	
	Technical scores	Financial prices
Award recommendation	To lowest evaluated price above minimum qualifying score. Consultant's name: _____	

