



Introduction

To assist you in assessing quotes/tenders received you can use the 'Price-Quality evaluation scoresheet template'. This is a spreadsheet which can be downloaded and filled in to work out which contractor or conservator should be awarded the work.

Requirements for using the evaluation spreadsheet

To use the Price-Quality evaluation spreadsheet you will need to have access to the internet and the ability to save this document to your PC/laptop/tablet or other device before using. If you are not able to complete this electronically then please contact WMT to discuss preparing your Price-Quality evaluation. Similarly, if the layout or formatting of the document is difficult for you to use or follow then please contact WMT to discuss.

Assumptions

The template has been prepared on the basis of the following Price-Quality criteria and weightings which are considered to be appropriate for war memorials. You may wish to alter these if you are looking to apply different criteria but you must always state these to potential contractors or conservators before you seek quotes/tenders. And you **must** apply the stated criteria when undertaking your assessment. You cannot change the criteria once you have asked for quotes/tenders:

- The maximum price score will be 70%
- The maximum quality score will be 30%, based upon the following sub-criteria and weightings:
 - Previous relevant experience of similar works and references will be 70%
 - Quality of Tender Submission (including details of price, proposed method statement and technical approach) will be 30%

The Price-Quality evaluation spreadsheet provides for assessing 6 quotes/tenders. You will only need 2 or 3 quotes/tenders but we are aware that a tender process can generate more returns so we have provided for that.

If you have

- more than 6 quotes/tenders for the same work please contact us to discuss
- multiple works within a project then you should provide comparisons of the 2 or 3 quotes/tenders for each area of work. This means you may submit more than one Price-Quality evaluation spreadsheet

Layout of the template

On the template

- the sections to be completed, or which you may wish to change, are highlighted in red
- there are 7 sheets
 - Scoring sheet – the main page to use to assess
 - Quality Company A – the page for assessing the quality marks for Company A
 - Quality Company B – the page for assessing the quality marks for Company B
 - Quality Company C – the page for assessing the quality marks for Company C
 - Quality Company D – the page for assessing the quality marks for Company D

- Quality Company E – the page for assessing the quality marks for Company E
- Quality Company F – the page for assessing the quality marks for Company F

Guidelines to complete the document

1. Cells which you should not be entering data into have been locked to prevent you putting the wrong information in the wrong fields
2. Before you contact any contractors or conservators you should set up a copy of the Price-Quality evaluation spreadsheet with your criteria. On the worksheet called 'Score'
 - insert the name of your project where it says *Name of Project
 - insert the estimated total project costs (where applicable) in the relevant box, 0.00
 - in the 'Quality assessment criteria' section go to the yellow boxes
 - 'Previous relevant experience of similar works and references' – in the box next to this enter the % value which is being assessed as part of the Quality review (row 9)
 - 'Quality of Tender Submission (including details of price, proposed method statement and technical approach)' – in the box next to this enter the % value which is being assessed as part of the Quality review (row 10)
 - in the yellow 'Weighted Quality score' field enter the % of the assessment which is going to be based on Quality (row 12)
 - in the yellow 'Weighted Price score' field enter the % of the assessment which is going to be based on Price (row 17)
3. When you have received all your quotes/tenders back on the deadline day open the spreadsheet to use it for assessment. Enter the names of each the contractors, conservators or companies in the boxes marked 'Company A', 'Company B' etc. in the 'Quality assessment criteria' section (row 7)
 - this will then automatically populate the
 - 'Price assessment' section and
 - the individual 'Quality' score sheets, which can be found as 'tabs' across the bottom
 - insert the price submitted by the contractors/companies in the relevant 'Price total' boxes (row 15)
4. Complete the 'Quality' score sheets for each of the contractors/companies
 - click on the relevant 'tab' across the bottom of the spread sheet e.g. QualityCompanyA
 - enter the scores out of ten for each quality question in the relevant boxes
 - ensure that you record any reasons to support the scores in the 'Comment' box, as these will be helpful should any of the contractors/companies request feedback on their quotation/tender
5. Once items (3) and (4) above have been completed the template will automatically evaluate the Price-Quality and provide a ranking to indicate the quotes/tenders order based on your assessment criteria (row 21)
6. The quote/tender 'ranked 1' should then be your 'preferred' contractor and indicated as such on your Application Form
7. You should sign and date the document to confirm the assessment. A copy of the spreadsheet should be sent in with your Application Form

Please note that this helpsheet is intended to offer informal advice and is a distillation of experience. The information contained in this helpsheet is not exhaustive and other sources of information are available.