

## **Financial Assessment of Tenderers and Contractors Period Offer**

### **Generic Debrief to Tenderers**

#### **1. Overview**

- 1.1 AusAID wishes to thank all who tendered for the above Period Offer. The tender was advertised on 25 August 2001 and closed on 2 October 2001.
- 1.2 The tender attracted 5 complying tenders firms nominating a total of 20 individuals. The high overall quality of the tenders provided a very competitive field and allowed AusAID with the assistance of the Technical Assessment Panel (TAP), to make clear distinctions in relation to tender quality and between individuals nominated.
- 1.3 In the Request for Tender, AusAID advised that it would provide Tenderers with a generic debriefing summarising the common strengths and weaknesses of the tenders received (as identified by the TAP) to assist tenderers to formulate future AusAID tenders.

#### **2. About The Technical Assessment Panel (TAP)**

- 2.1 The TAP comprised appropriately qualified AusAID representatives. The TAP ranked tenders and individuals on the basis of their technical merit based on the tender content against AusAID's specifications as set out in the Selection Criteria and the Terms of Reference contained within the Request for Tender. The following summarises TAP member comments on the common strengths and weaknesses of the tenders received.

#### **3. Inclusions Which Strengthened or Weakened Tenders**

##### *General Comment*

##### *Strong Tenders*

- 3.1 In broad terms, the TAP found that tenders which rated well in the technical assessment generally:
  - were well structured, clearly set out and presented information in an easily accessible manner;
  - fully addressed all selection criteria in their response;
  - presented information relevant to the selection criteria;
  - substantiated their responses with relevant/pertinent examples; and

- presented information about individuals that clearly identified their role in any given example projects.

## **Weaker Tenders**

3.2 The TAP found that tenders which rated poorly in the technical assessment generally:

- were disjointed in presentation, making it difficult to draw a link between the response and the selection criteria;
- were brief or dismissive of some of the criteria or neglected to address each of the criteria separately;
- relied on "... years of experience" or referred to a general "CV" in addressing criteria without presenting examples relevant to the criteria;
- failed to demonstrate an appreciation of each selection criterion;
- were generic in nature, in that similar responses to criteria were submitted for all or a number of individuals nominated;
- provided common responses for a number of personnel in the tender making it difficult to identify the skills and knowledge of individuals;
- claimed that individuals had a particular experience but provided insufficient information to substantiate the claim:
  - often providing only a project name, without clearly stating the role that was performed on the project;
- quoted the same projects as evidence of relevant experience for a number of nominees without clarifying the role performed;
- presented their responses in a poorly structured document; and
- failed to link the significance of example projects to the AusAID context.

## ***Comments Against Selection Criteria***

### ***Selection Criterion A1 -Demonstrated capacity to respond quickly to AusAID requests for Financial Assessments***

3.3 Tenders which rated well against this criterion:

- Clearly described the organisation's capacity to respond;
- Described organisational experience and strengths;
- Indicated how they were currently responding to similar requests; and
- Confirmed that they could respond to requests within two working days.

3.4 Lower scoring tenders:

- Merely stated the existence of this capacity but made no attempt to demonstrate it;
- Some did not address the criterion at all;
- Others failed to demonstrate a suitable level of permanent staff and/or organisational history.

### ***Selection Criterion A2 -Demonstrated Capacity to Respond Quickly (Personnel or Teams)***

3.5 Tenders which rated well against this criterion described:

- The process to be undertaken to achieve this response; and
- The organisation in a way that demonstrated the capacity to respond to this criterion

3.6 Lower scoring tenders:

- Provided inadequate detail about how they would meet this requirement; and
- Failed to demonstrate a suitable level of permanent staff and/or organisational history

### ***Selection Criterion A3 - Appropriate Office, Administration and Financial Support Capacity***

3.7 Tenders which rated well against this criterion:

- Provided details of how they are currently providing support for personnel in the field; and
- Described their organisational structure sufficiently to demonstrate the capacity provide the support.

3.8 Lower scoring tenders:

- Provided only a general response to this criterion; and
- Failed to clearly demonstrate that appropriate office support capacity was in place to support personnel in the field.

***Selection Criterion A4 – Capacity & experience in undertaking financial assessments***

3.9 Tenders which rated well against this criterion:

- Demonstrated a clear understanding of the nature of the tasks likely to be required under the Period Offer; and
- Gave examples demonstrating their experience in and capacity to undertake financial analysis.

3.10 Lower scoring tenders tended to provide examples demonstrating general financial and accounting experience but failed to demonstrate their experience in and capacity to undertake financial analysis.

***Selection Criterion A5 – Demonstrated capacity to prepare and produce high quality documents***

3.11 Tenders which rated well against this criterion:

- Provided information about their quality control processes (formal or informal);
- Provided a high quality tender (in terms of content, editing, set-out and spelling); and
- Described how the organisation prepares/produces quality documents

3.12 Lower scoring tenders:

- Were too general in their response and appeared not to grasp the importance of this criterion;
- Provided repetitive responses which appeared to be copied between personnel; and
- Provided a poor quality tender (in terms of content, editing etc.).

***Selection Criterion B1 – Appropriate formal qualifications (Commerce / Accounting)***

3.13 Tenders which rated well against this criterion:

- Provided clear evidence of appropriate qualifications; and
- Clearly stated whether the qualifications were academic or professional.

***Selection Criterion B2 - Up-to-date knowledge & skills (Financial Assessment and Analysis)***

3.14 Tenders which rated well against this criterion for each individual:

- Provided a clear “trail” of how they maintained their skills base;
- Clearly described actual knowledge and specialist skills; and
- Demonstrated experience in conducting financial assessments of the type required in both the Public and the Private Sectors.

3.15 Lower scoring tenders provided for each individual:

- Only very general statements such as “I confirm that I have up-to-date knowledge and skills in financial assessment”;
- Failed to demonstrate experience in and knowledge of financial assessments; and
- Showed limited or narrow financial assessment experience (for example limited to the Public Sector).

***Selection Criterion B3 – Demonstrated ability to apply knowledge and skills in practice.***

3.16 Tenders which rated well against this criterion for each individual:

- Provided a work history which demonstrated the ability to apply their skills;
- Provided examples illustrating successful use of the required knowledge and skills; and
- Demonstrated current and extensive experience

3.17 Lower scoring tenders:

- Failed to match the skills with the requirements of the Period Offer; and
- Failed to demonstrate the length, breadth and continuity of experience in financial assessment and analysis.

***Selection Criterion B4 – Highly developed analytical skills***

3.18 Tenders which rated well against this criterion:

- Demonstrated a clear understanding of the likely problem solving/situation analysis role in work assignments; and
- Gave examples of situations where financial analysis skills were demonstrated.

3.19 Lower scoring tenders generally failed to demonstrate an appreciation of the relevance of the conducting financial analysis of tenderers and contractors.

***Selection Criterion C1 - Excellent oral and written communication skills (and ability to produce timely reports)***

3.20 Tenders which rated well against this criterion provided evidence of nominated individuals' use of these skills, e.g. in seminar presentations, reports written and the role of these skills in the assignment.

3.21 Lower scoring tenders provided insufficient information about the oral and written communication skills of the individuals nominated.

***Selection Criterion C2 – Well developed interpersonal skills, cultural sensitivity and capacity to interact effectively and sympathetically in partner countries***

3.22 Tenders which rated well against this criterion:

- Provided evidence of the understanding of the importance of this criterion to development situations;
- Demonstrated that the individual could interact effectively with people at all levels of an organisation; and
- Demonstrated experience in successfully applying these skills particularly in development situations;

3.23 Lower scoring tenders:

- Simply stated that personnel had well-developed interpersonal skills/cultural sensitivity;
- Demonstrated limited interaction with clients or people at only one level of an organisation; or
- Were new to consulting work or had only worked at a junior level.

***Selection Criterion C3 - Capacity to provide leadership and/or participate in teams***

3.24 Tenders which rated well against this criterion:

- Provided evidence of team-based work, the individual's role and how it contributed towards the objective; and
- Described experiences which clearly demonstrated successful team leadership and/or participation in successful teams.

3.25 Lower scoring tenders provided insufficient specific evidence of the capacity to provide leadership and/or to participate in teams.

***Selection Criterion C4 – Appreciation of the goals, objectives and principles of Australia’s aid program***

3.26 Tenders which rated well against this criterion:

- Had obviously researched AusAID and the Australian aid program;
- Clearly demonstrated how their particular expertise could be transferred to providing advice appropriate to developing countries; and
- Gave examples of work for AusAID and experience with the Australian Aid program or similar programs.

3.27 Lower scoring tenders:

- Failed to demonstrate an understanding of the Aid program; and
- Often provided simplistic general statements which did not show an understanding of the issues involved.