

Step 8: Memorandum of Understanding and Pre Qualification Questionnaire

Tool 3: 'How to' guidance

This tool is for use in conjunction with Step 8 of the Commissioning Toolkit document

MOI/PQQ

When drafting the MOI/PQQ bear in mind the following:

- 1 the purpose of the MOI is to give potential bidders more information on the Project in order to decide whether to take their interest further and submit a response to the PQQ and to give the potential bidders the information they need in order to submit a bid - the focus is on the bidder;
- 2 the purpose of the PQQ is to enable the Commissioner to make a preliminary assessment on the capability, capacity and eligibility of the potential bidders. This is the first stage of the procurement process and it is about narrowing the pool of potential bidders and not about testing their ideas and solutions - the focus is on the Commissioner;
- 3 a quality MOI/PQQ will generate more interest in the Project and potentially attract more bidders and therefore create a competitive procurement – it is worth investing time and resource in getting it right.

Evaluating the Responses

It is important to have a clear evaluation plan and strategy before attempting to evaluate the responses to the PQQ. The evaluation should follow the principles of being open, fair and transparent.

The evaluation plan and strategy should include:

- 1 the team of workstream specialists who will evaluate the responses;
- 2 what information will be made available to the evaluators of each workstream;
- 3 the dates when the evaluators will evaluate the responses and report back to the project lead;
- 4 the individuals who will be responsible for moderating the evaluated scores;
- 5 the dates when the moderators will complete the moderation;
- 6 how the evaluators and moderators will record their scores and rationale for the scores awarded – it is recommended that a standardised score sheet is issued to all evaluators and moderators so that a clear audit trail for the decisions reached is available;
- 7 how the team will shortlist potential bidders to take through to the ITT stage – bear in mind that this stage of the process is about pre-qualifying bidders and not about de-selecting bidders. The bidders should therefore know from the outset how they will pre-qualify (for example if the responses will be ranked and the top 10 taken through to ITT).