

Attachment C - Template EOI Evaluation Matrix

How To Use The Evaluation Matrix

This evaluation matrix has been developed as a template to assist public land managers in undertaking comparative evaluations of applications received through an Expression of Interest process for tour operator licences to be allocated through a competitive process. It is recommended that evaluation matrices be developed using a 'Spreadsheet package', (eg Excel), rather than the use of a 'Word Processor', (eg Word), to automate numeric calculations. This instruction sheet should be deleted once the evaluation matrix, contained on the following pages, has been completed.

Please note the following:

- 1 The evaluation matrix is set up in Excel so that **scoring and weighting calculations can be done automatically** through the use of formulae included in the attached sheet
- 2 **Insert the title of the project and the names of the specific applicants** on the top of the first page - this will be automatically replicated on the second page. They will need to be inserted manually on the top of further pages and columns should additional pages be created.
- 3 If more than 3 applicants are to be evaluated **duplicate this document as required**.
- 4 Selection criteria used for the assessment should be **those advised in the EOI documentation**. If specific criteria weightings were included in the tender documentation they too should be the same in this evaluation document. A summary of the criteria wording should be used in this document if space is limited.
- 5 If more criteria have been used than the number of examples in the attached form **insert additional rows ABOVE the last criteria** in the section and copy the entire row from the last criteria into each of the inserted rows. (You may need to turn off sheet protection before doing this, and on again after, using Tools - Protection).
- 6 Similarly, if you have less criteria than currently built into the example form **delete rows ABOVE the last criteria** to ensure the built in formulas remain intact. (You may need to turn off sheet protection before doing this, and on again after, using Tools - Protection).
- 7 **Overwrite existing criteria, weightings and scores** with those that apply to your EOI. ('Wt. Score' will be calculated automatically), if using additional blocks of criteria copy existing full blocks and be sure to update the final totals formula.
- 8 If you have used a different **scoring scale** to that on the last page, update the scoring scale to reflect the one you used.
- 9 It is recommended that **scoring criteria be restricted to 5 whole numbers**, (or perhaps 10), - without the use of decimal points. Greater break-up than this is unlikely to add value to the evaluation process.
- 10 It is recommended that evaluation scores be 'the agreed scores' of the Evaluation Committee and not be calculated by averaging individual assessments.
- 11 Comments should **highlight specific strengths and weaknesses**, not just provide a summary of the services offered.
- 12 Care should be taken to ensure **consistency between scores and comments**, for each criteria, across the range of applications being evaluated.
- 13 **If you have added or deleted any parts of the document check that formulas are intact and calculations are based upon all cells.**

9	Innovation	2								
Total Operational Criteria Score			0	0	0					

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[Insert project title here]

FINANCIAL/RISK CRITERIA		Applicant 1 [insert name here]		Applicant 2 [insert name here]		Applicant 3 [insert name here]	
Selection Criteria	Comment	Requirement Met?	Comment	Requirement Met?	Comment	Requirement Met?	
10	Agreement to conditions of licence						
11	Financial Viability						
12	Risk and Insurance						
13	Conflicts of interest						
DECISION		Include statement of whether / licence(s) allocated / not allocated		Include statement of whether / licence(s) allocated / not allocated		Include statement of whether / licence(s) allocated / not allocated	

* The weightings (wt.) are examples only, and are relative to each other and as a proportion of the total. They do not have to add to any specific amount although it may simplify processes by standardising scores to 100.

SCORING

- 0 = Not acceptable, has not addressed criteria
- 1 to 4 = Demonstrates limited understanding or capability - cannot be confident that evaluation criteria will be met
- 5 = Acceptable - satisfactory understanding or capability - reasonably confident that evaluation criteria will be met
- 6 to 8 = Good understanding or capability - confident that evaluation criteria will be met
- 9 to 10 = Excellent understanding or capability - complete confidence that evaluation criteria will be met