



# Notebook Framework

## Applying Framework Award Criteria

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### Overview

Directive 2004/18, on which the frameworks are based, requires that the framework agreement be clear on the award criteria that will be used by customers when they are evaluating mini-competitions. When it was designing the Notebook Framework the Steering Group took note of the very diverse requirements that a customer base incorporating the whole non-commercial public service would have, with some viewing cost as the paramount consideration, others speed of delivery, still others reliability with regard to the provision of associated services and so on. The award criteria that are defined in the framework agreements aim to allow the customers to express their individual requirements clearly and to evaluate the Vendors' proposals in a transparent way that will select the one which offers them the best value for money.

There were six criteria in the Notebook Framework:

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#### Cost

This is the cost to you, the Customer, which may include the Vendors' proposed prices and an estimate of any likely additional costs arising out of the proposals. It may also include a Cost/Performance value as a means of balancing the fact that improved performance is of value to you but is likely to cost more.

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#### Suitability for Intended Use

This is an assessment of the proposal with regard to what the products and services will be used for, how they will be used or who they'll be used by, and the environment (including the physical and policy environments) they'll be used in. For instance you may have users with particular accessibility needs that require larger screens, or a Data Protection policy that discourages DVD rewriters on Notebooks.

This criterion is the one that most allows you to evaluate the proposals with regard to your specific circumstances. You can include all aspects of the proposal's suitability, from the features the product offers to how well it will fit in to the way your organisation works, but you must remember to be transparent in how you do this. For instance, if you have a policy of buying greener products you should say that marks will be awarded under this criterion for

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Green Certification, or if your policies forbid high-volume removable storage such as DVD writers or USB keys you should say that marks will be awarded for the ability to control or restrict the use of such devices.

**References attesting to the quality of products and services**

This will be particularly important to you if you are intending to conclude a drawdown agreement or some other arrangement where the Vendor's ability to provide high quality service on an ongoing basis is critical. The evaluation process for the framework itself will have selected vendors that are focussed on providing quality products and services but you will want the reassurance that that focus on quality will be applied to your specific circumstances. References from customers with similar requirements are the most common means of gaining this reassurance with references often stating the number of products bought, whether or not they were the same as the ones being proposed or from the same range, and giving a mark (e.g. out of ten) for the quality of the products and services delivered by the Vendor.

**Delivery Conditions**

This allows you to assess the proposals with regard to, for example, the delivery lead time, charges (which may vary according to the delivery address), requirements you may have in terms of out-of-hours and bulk delivery, etc. As with all criteria you should try to be as transparent as possible about what you consider valuable, so if your need is urgency you should say that marks will be awarded for shorter delivery lead times, if you are concerned that your bulk delivery requirements may get complex say that marks will be awarded for a simple delivery procedure, etc.

Another issue that may be considered under Delivery Conditions is disposal of obsolete equipment under the WEEE regulations. Some vendors have complex conditions regarding the minimum number of products and packaging requirements while others don't, so you can award marks for simpler procedures here.

**Excess over minimum specification**

This criterion was intended to be used in conjunction with the Cost criterion above to balance out the fact that a proposed



specification that is in excess of the stated minimum would have value for customers but was likely to cost more. In point of fact it is not used very often because the Cost/Performance value and Suitability For Intended Use criterion effectively take account of the proposed product's specifications.

If you do intend to use it you should take care to avoid double marking and make sure that the Cost or Suitability for Intended Use criteria don't take the product's specification into account, and particularly that you don't use the product's performance index (because that's based on the product's specification) in either one.

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### Special Requirements

This criterion is intended to let you consider aspects of the proposals that address unusual requirements that are more than likely specific to your organisation, such as security clearance for the Vendors' personnel that may be required on site, specific design or construction requirements (e.g. for use in medical environments), etc. As with the previous criterion many of the issues that Special Requirements addresses can be addressed through the Suitability for Intended Use criterion and so this one is rarely used.

Naturally, if you intend to use this criterion you should remember to state exactly what your special requirements are so that the Vendors can make appropriate responses.

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Since the establishment of the Notebook Framework the issue of Green procurement has become more important and so the Monochrome Laser Printer framework introduced a seventh criterion, **Environmental Considerations**, to address this. Where previously green issues were considered under the Suitability for Intended Use (i.e. the products would be assessed on their compliance with the organisation's environmental policies) the addition of a specific criterion allows you to reflect the importance of environmental issues more clearly as well as allowing the Vendors the opportunity to highlight their products' green benefits.



## Choosing the Appropriate Criteria

When you're deciding what criteria to apply it's a good idea to start with Cost since the reality is that whatever justifications you may need to make will usually revolve around the amount of money you are spending. After that it becomes a fairly straightforward question of what you're willing to pay extra for: would you pay more to get the products sooner, if so award marks for a shorter delivery lead time, would you pay more for a product with better performance, if so award marks for Cost/Performance rather than just Cost or Suitability for Intended Use (on the basis that the users require the best possible performance or that a higher performance will extend the usable life of the product) or Excess Over Minimum Specification. If you're entering a drawdown agreement or some arrangement where reliability over a period of time is important then award marks for better references, and so on.

The basic criteria listed above can be clarified or broken down into sub-headings so that you can examine particular aspects. For example, the Cost criterion could be clarified as follows:

<b>Cost</b>	
Proposed Price of the Product	75%
Proposed Price of the Installation Service	25%

This is particularly useful if some elements of your request for quote are optional and you don't want those optional costs, which you may or may not incur, to skew the overall evaluation. So in the above example, you will have to pay the price of the proposed product but you may not want to avail of the installation service if, for example, you can get it cheaper elsewhere.

Finally, you can assign a weight to each criterion to reflect its importance to you, including a weight of zero (for example, if you have no Special Requirements). Most customers use percentages but you can use any marking scheme you wish so long as it is published with the request for quote and applied objectively and fairly. Weights can be assigned at the criterion or sub-heading level, though if you clarify a criterion into sub-headings it is probably a good idea to assign the weights at the sub-heading level, otherwise it may be assumed that each sub-heading carries an equal weight.

## Awarding the Marks

When you're applying the award criteria you should do so in full accordance with the principles of procurement: equality, non-discrimination, transparency, proportionality and mutual recognition. The value of your competition will affect the degree of formality surrounding its evaluation: no one expects you to form a team of six people to evaluate a request for quote for twenty Notebooks but they might for a drawdown agreement for two thousand. Similarly, most interested parties would accept that the criteria for a competition for five printers were applied fairly and objectively without



argument, but for a competition for a hundred they might want to see evidence that they were.

So for lower values it is generally sufficient to publish the award criteria and their respective weightings in the Request For Quote, but for larger values (say, in excess of the guidelines for publishing a tender on eTenders) you should consider including formulae and/or guidance to the evaluators in your marking scheme to demonstrate objectivity and promote consistency. These formulae and notes don't need to be published with the Request For Quote but you should be prepared to discuss them as part of the feedback to unsuccessful Vendors should the need arise.

There are two commonly used formulae for awarding marks based on clearly objective values such as the proposed price, those being:

- **Partial Spread**, whereby the best value gets the full marks and the others get a proportional amount based on their relation to that value. For example, if the lowest price is €100, a proposal of €200 will get 50% while a proposal of €300 will get 33.33% and so on.
- **Full Spread**, whereby the best value gets full marks, the worst value gets zero and everything else gets something in between based on their position relative to the two.

The choice of which one to use is mostly based on personal preference (in some circumstances there may be an issue around proportionality but not usually).

Both formulae are given below, both for criteria where the lowest value is best (e.g. price, delivery lead time, etc.) and for criteria where the highest value is best (e.g. performance ratings, etc.)

	Lowest is Best	Highest is Best
<b>Partial Spread</b>	$Marks * \left( \frac{Lowest}{Proposed} \right)$	$Marks * \left( \frac{Proposed}{Highest} \right)$
<b>Full Spread</b>	$Marks * \left( \frac{Highest - Proposed}{Highest - Lowest} \right)$	$Marks * \left( \frac{Proposed - Lowest}{Highest - Lowest} \right)$

Before using these formulae, however, you should give careful consideration to the likely outcome and satisfy yourself that it will yield the desired result. For instance, if you apply the full spread formula to the proposed prices the highest price will get zero, even if the spread between the highest and lowest price is only 1 cent! That may be a bit harsh unless cost is of paramount importance to you.

Similarly, the Partial Spread formula won't result in significantly different marks unless there is a significant spread in the values. Prices normally come in around ten percent of one another so the actual spread of marks will be quite small when this formula is applied to prices. If it's applied to delivery lead times, however, it can behave almost like a full spread formula because the difference between a 1-day and a 2-day delivery lead time is 50%. This means that the partial spread formula is



best applied to a high mark if the values are likely to be clustered close to one another (as with prices) and a low mark if they're likely to have a relatively broad spread (as with delivery lead times).