



User(s) Evaluation Matrix

Request for Proposal or Request for Quotation Criteria Considerations for: (description)	<input checked="" type="checkbox"/> what is to be considered.	<input checked="" type="checkbox"/> Weighting to be considered. Note: If you wish all items to be considered equal you would check 5 for each of the items you want to be considered.				
<i>Elements to be considered are but are not limited to:</i>	<input type="checkbox"/>	low 1	2	medium 3	4	Important 5
CORPORATE STRENGTH: References, reputation, appropriately and legally registered for intended service or supply, completeness and clarity of offering, sales representation. and environmental stewardship, prior experience on comparable projects or services in the public sector environment, submission quality, completeness and compliance to requested format.	<input type="checkbox"/>					
FINANCIAL: Lowest overall cost for delivery of service, lowest supply chain costs, lowest freight costs, cost containment strategies, cost of change, lowest operating/inventory carrying costs, base costs, exchange rate protection, CPI, duty, quantity discounts, EDI/EFT discounts, early payment discounts, purchase discounts, financial incentives, rebates, committed and non-committed volume or dollar pricing, standardization incentives, consignment inventory options, JIT(Just-in-Time) cost control guarantees, bankruptcy protection and financial stability.	<input type="checkbox"/>					
TECHNOLOGY/SPECS/QUALITY/SERVICE Vendor performance, Compliance to specifications, clinical performance, ease of use, packaging, quality, suitability, ISO brand specific, product acceptability, safety, delivery, assured source of supply or service, product and service warranties and guarantees, reliability, expansion capabilities, alternative sources of supply and services, operation process for technology improvement, IT compatibility for EDI ordering/processing and committed and non-committed volume supply and dollar value considerations, meeting appropriate product merchantability, leading edge supply strategies and scalability from old to new products.	<input type="checkbox"/>					
VALUE ADDED: (10%) Strategic corporate alliances, research and development, competitive advantage, revenue generation, cost reduction initiatives, supply chain efficiency programs, innovative ideas, presentations, demonstrations, social economic consideration, current or existing Corporate Agreements with the Surrey School District, support of the PPP (Public, Private, Partnerships) philosophies, support of single supply initiatives with significant incentives, adding or accessing resources to improve utilization of personnel and facilities, Education and Research initiatives.	<input type="checkbox"/>					

Submitted by: (printed name) _____

Signature: _____ Date: _____

(User's signature indicates they understand and accept the responsibilities associated with the use of this document including the Conflict of Interest declaration per School District #36 (Surrey) Policy #7213 and Regulation #7213.1.)

Comments: _____

EVALUATION MATRIX COMPLETION INSTRUCTIONS

User is to indicate what is important by applying a checkmark to the appropriate number that represents the importance level.... 5 being TOP PRIORITY. The examples provided in each section of the evaluation criteria are issues that would apply in this category. Additions or deletions are encouraged to customize the evaluation criteria to each requirement.

EVALUATION MATRIX COMPLETION INSTRUCTIONS

1. User is to indicate what is the most important criteria that is to be considered by applying a checkmark in the appropriate area.
2. User indicated what level of importance is that section by choosing a number from 1 to 5 (5 being the most important).
3. User is to provide name and signature on matrix document and submit to the assigned buyer for this particular item material or service complete with the specifications of the requirement.

If the goods being purchased effect more than one user, then each user should submit their own evaluation matrix expressing their areas of importance. If more than one evaluation form is received, the data will be collected, averaged and weightings applied accordingly. In this case, Purchasing may sent the final evaluation ratings for review prior to the completion of the Request for Proposal or Request for Quote document. Each document, RFP or a RFQ, has legal implications and the application and use of the appropriate nomenclature will be determined by the Buyer and in cooperation with the user(s).



Evaluation Criteria

The following criteria and section weightings will be applied when evaluating this RFP/RFQ:

SECTION	WEIGHTING
Corporate Strength	
Financial	
Technology/Specifications/Service/Quality	
Value Added	10%
TOTAL	100%

NOTE: Not all sections will apply to every RFP/RFQ. For example, if you require one item (no sub) and only the price and delivery is important, the weightings could reflect: Financial: 85% Delivery: 15%.

All deviations to the standard evaluation matrix will be reviewed and approved by the Purchasing Manager.

Evaluation Criteria Elements of Consideration:

Corporate Strength

Vendor performance, references, reputation, appropriately and legally registered for intended service or supply, completeness and clarity of offering, sales representation, environmental stewardship, prior experience on comparable projects or services in the public sector environment, submission quality, completeness and compliance to requested format.

Financial

Lowest overall cost for delivery of service, lowest supply chain costs, lowest freight costs, cost containment strategies, cost of change, lowest operating/inventory carrying costs, base costs, exchange rate protection, CPI, duty, quantity discounts, EDI/EFT discounts, early payment discounts, purchase discounts, financial incentives, rebates, committed and non-committed volume or dollar pricing, standardization incentives, consignment inventory options, JIT(Just-in-Time) cost control guarantees, bankruptcy protection and financial stability.

Technology/Specifications/Service/Quality

Compliance to specifications and performance, ease of use, packaging, quality, suitability, ISO brand specific, product acceptability, safety, delivery, assured source of supply or service, product and service warranties and guarantees, reliability, expansion capabilities, alternative sources of supply and services, operation process for technology improvement, IT compatibility for EDI ordering/processing and committed and non-committed volume supply and dollar value considerations, meeting appropriate product merchantability, leading edge supply strategies and scalability from old to new products.

Value Added

Strategic corporate alliances, research and development, competitive advantage, revenue generation, cost reduction initiatives, supply chain efficiency programs, innovative ideas, presentations, demonstrations, social economic consideration, current or existing Corporate Agreements with SD36, support of the PPP (Public, Private, Partnerships) philosophies, support of single supply initiatives with significant incentives, adding or accessing resources to improve utilization of personnel and facilities, Education and Research initiatives.

Corporate Affiliations or Strategic Alliances

The Surrey School District, BC's largest school district with more than 62,000 students is actively seeking to develop corporate affiliations or strategic alliances with the business community. Our targeted objectives to support the Corporate affiliations and strategic alliances are as follows:

1. to increase revenue to the District and/or to reduce costs to the District
2. to use the size and stability of the school district to benefit corporate affiliates by considering comprehensive, long term purchase agreements
3. to promote corporate affiliates through the district and the community at large and to increase awareness in our community about corporate affiliates and their good citizenship

Corporate affiliations or strategic alliances may involve directed donations to specific school District programs such as the new Bell Centre for Performing Arts or the School Meal Program for students in need.

Additional promotional benefits that may be offered to corporate affiliates and donors include:

- Corporation acknowledgements in school and district publications
- Presentations at public board of trustees meeting
- Plaque placement in the new Bell Centre for Performing Arts
- Invitation to sponsor evenings at Bell Centre for Performing Arts
- Logo placement in local newspaper advertising
- Press release distribution announcing the corporate affiliation or **strategic alliance**.
- Certificate of appreciation
- Tax receipt

Advertising Opportunities

The School District# 36 (Surrey) also invites corporation participation to purchase advertising space available in the following areas:

1. The District's Parent publication goes out three times per year to the parents of our 62,000 students
2. Fixed signage placed on the outward facing sides of school fences.
3. Logo placement and affiliation recognition on school district maintenance trucks

The School District No. 36 (Surrey) encourages its Vendors/Suppliers/Consultants to return innovative proposal responses. All Value Added offers should be identified in the Value Added section of the Proposal Questionnaire and have a Fair Market dollar value assigned to that particular offer.

SD36 reserves the right to negotiate redemption, access and application of each value added offer as presented or accept the Fair Market Value in cash or in the form of a rebate or a cheque to further reduce the overall cost to the SD36.