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Proudly supporting 360 – the procurement manager's dream solution
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Getting started guide – for evaluators

Introduction to evaluations with 360

This guide is for evaluation team members who are new to evaluations with 360.

Contents

Correct as at 25/05/2024

Introducing 360

360 is an online system that receives information from businesses and displays it to evaluation teams in accordance with best practice procurement standards.

360 consists of two portals:

1. The **Internal Portal** allows organisations to:
    a. Configure formal questionnaires such as requests for tender and requests for award nominations
    b. Publish them openly (public) or to selected respondents (invitation-only)
    c. Manage correspondence with respondents
    d. Evaluate responses and rank the submissions
    e. Maintain confidentiality with auditable records and information access logs
2. The **Public Portal** allows respondents to:
    a. Save responses to each question that applies to them (some may not)
    b. Request more information (contact the request manager)
    c. Receive more information (via addenda and direct messages)
    d. Provide more information (via clarifications – initiated by evaluators)

Most important concepts

360 is a paperless system

360 displays responses in a question-and-answer format online. The questionnaire often includes guidance for evaluators too.

All scores are required

Rankings are only accurate if all scoring is complete and in accordance with the relevant evaluation plans, guidance, and best practice.

Evaluators are free to score as they see it – free from influence

360 saves each evaluator's scores and thoughts securely. If your team uses consensus evaluations, the nominated consensus evaluator can adopt the team's average scores and combined comments.

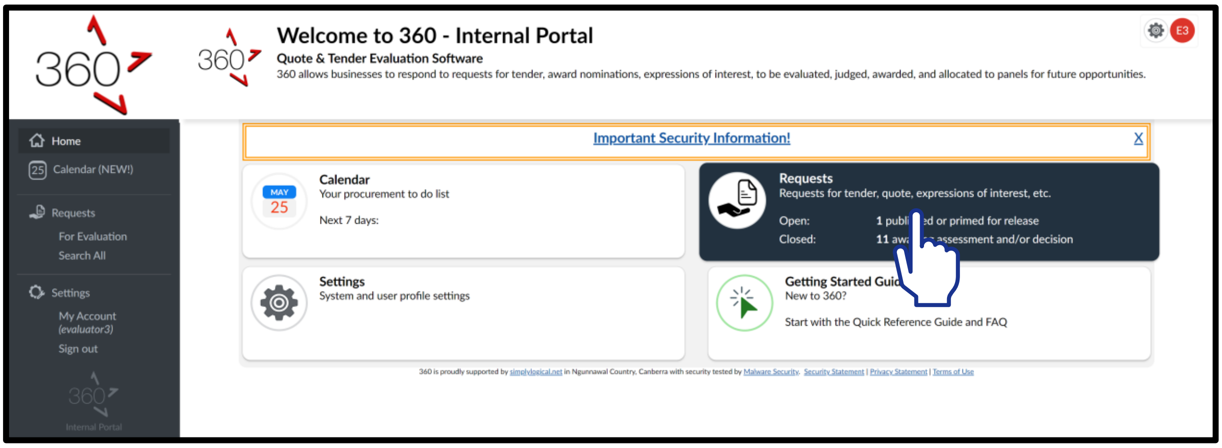
Data in 360 must be treated as IN-CONFIDENCE information

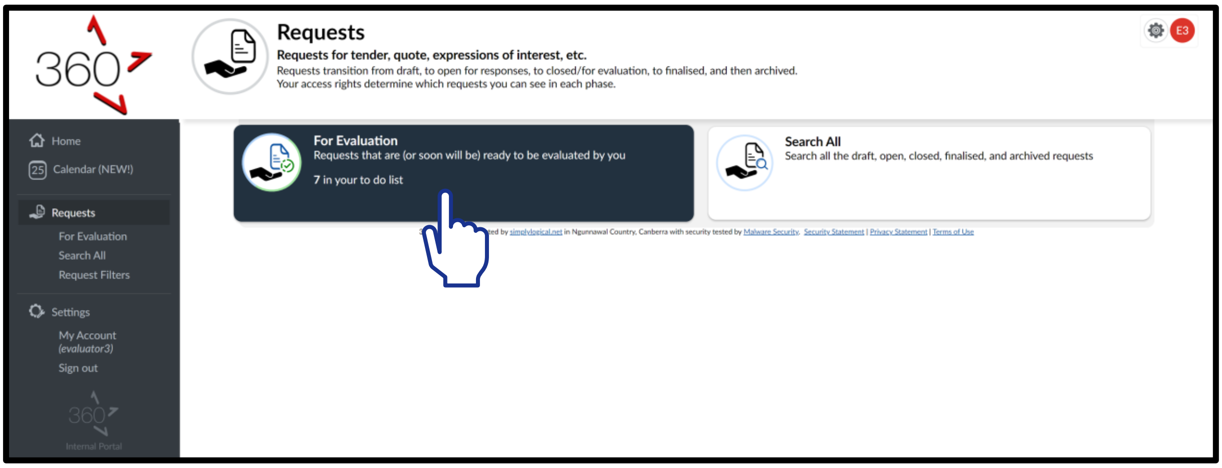
Respondents trust that all data is managed securely and that conflicts of interest are managed within best procurement practices. 360 has access and audit logs. If you have access to information that you don't think you should have, please alert the request manager immediately.

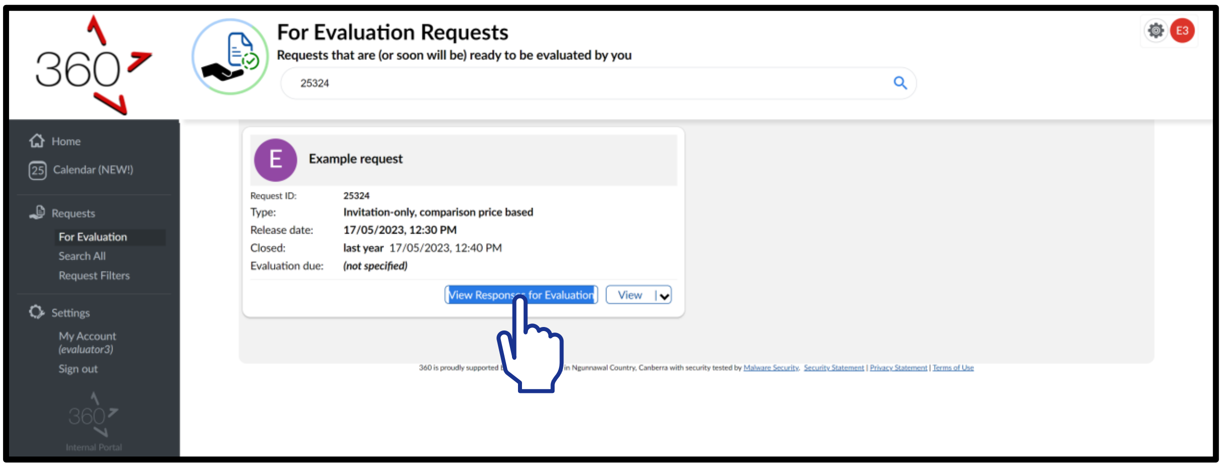
Step-by-step guide

Find the responses to evaluate

Responses to requests for tender, quote, etc., are usually made available to evaluators when they have closed and the request manager has completed compliance checks. When they are available, they will appear in your **Requests → For Evaluation** list.







System Security! The list only shows the requests you are authorised to see.

Evaluation dashboard

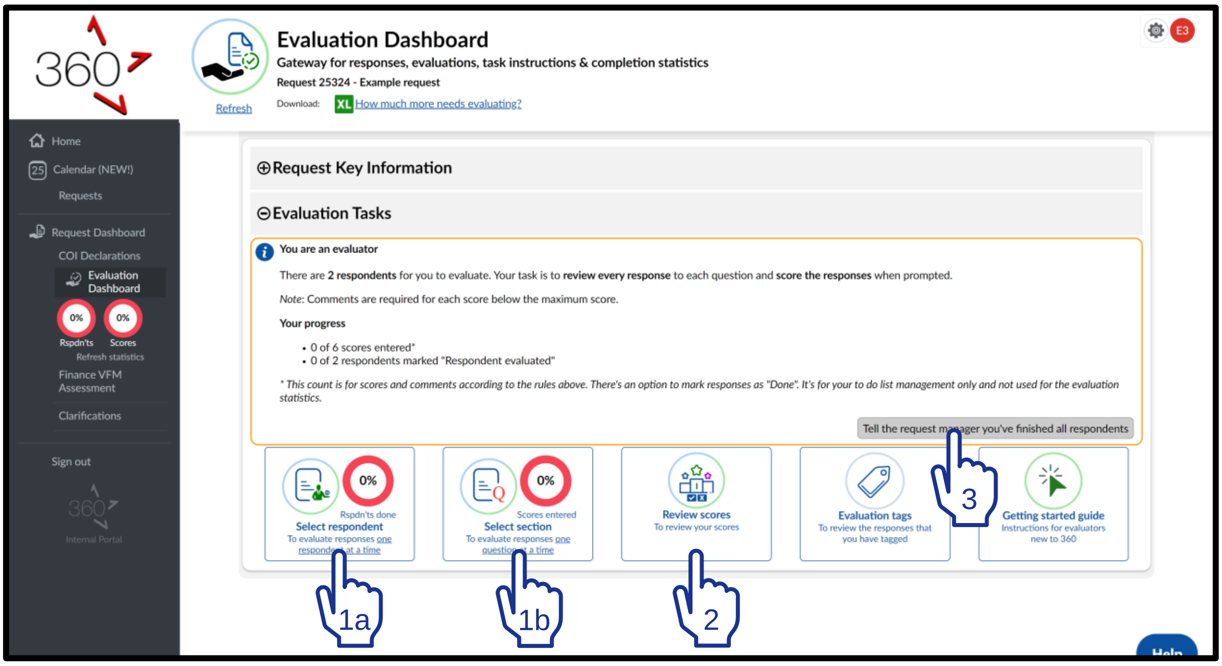
The evaluation dashboard is your gateway to the responses and evaluations.

To get started, click either:

- **Select respondent**
- **Select section**

These two options align with the two main ways to evaluate:

- **One respondent at a time** *(in wide and narrow layouts)*
- **One question at a time** *(in wide and narrow layouts)*



Note: There's also the less frequently used **one section at a time** view for experienced users.

> ***Tip! Choose the view that shows responses in the most convenient way.***

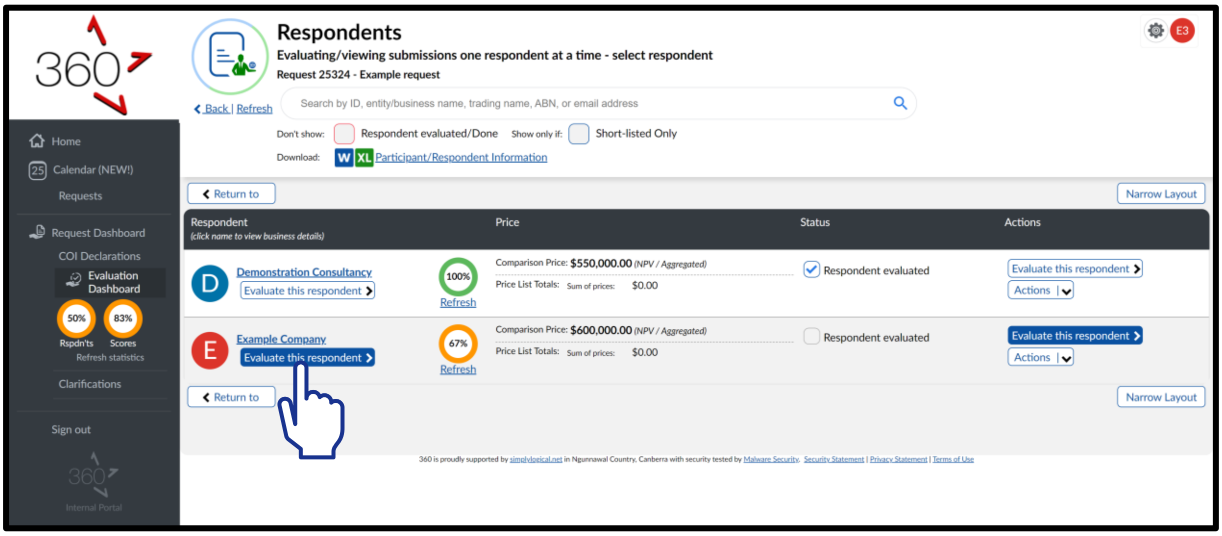
Evaluate one respondent at a time

The one respondent at a time mode is best when responses to multiple questions need to be evaluated all together – context-specific evaluations.

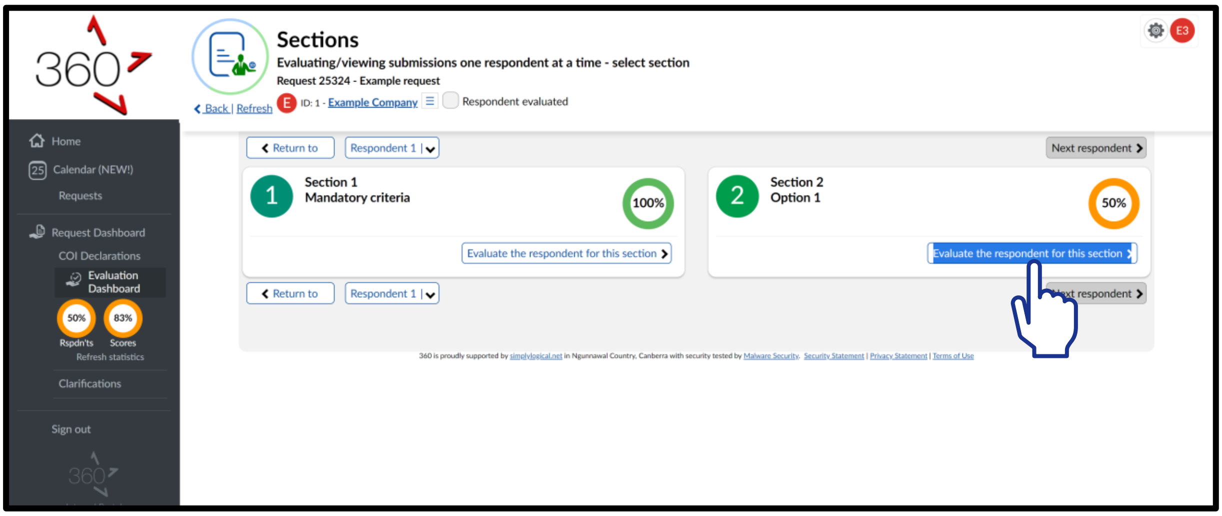
To evaluate one respondent at a time:

Select respondent → Select section → Evaluate responses → Click Next

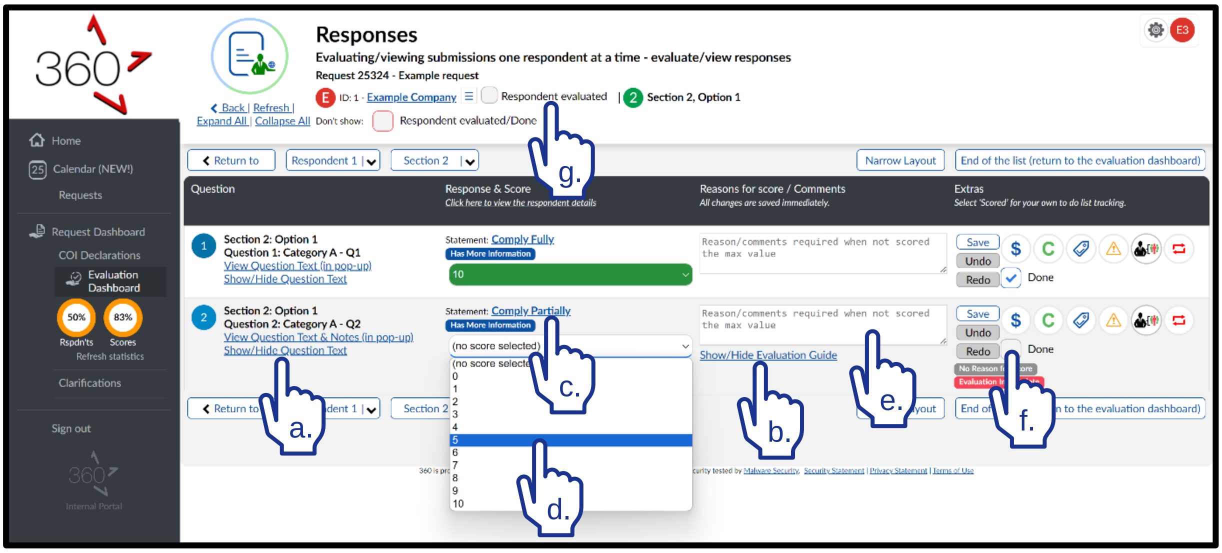
1. Select a respondent

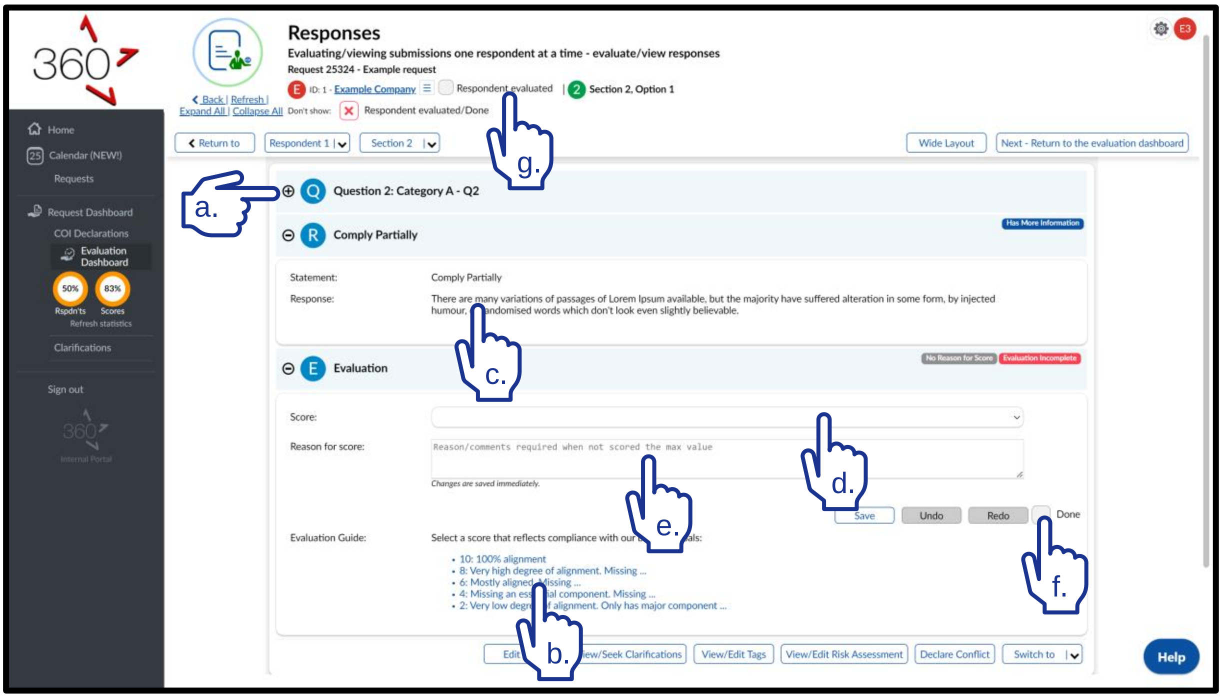


2. Select a section



3. Evaluate the responses by:
    a. Re-reading the question (the criteria)
    b. Re-reading the evaluation guidance
    c. Reading the responses
    d. Scoring as per the evaluation guidance
    e. Entering a reason for your score if required
    f. Marking the response as done (scored)
    g. Marking the respondent as evaluated





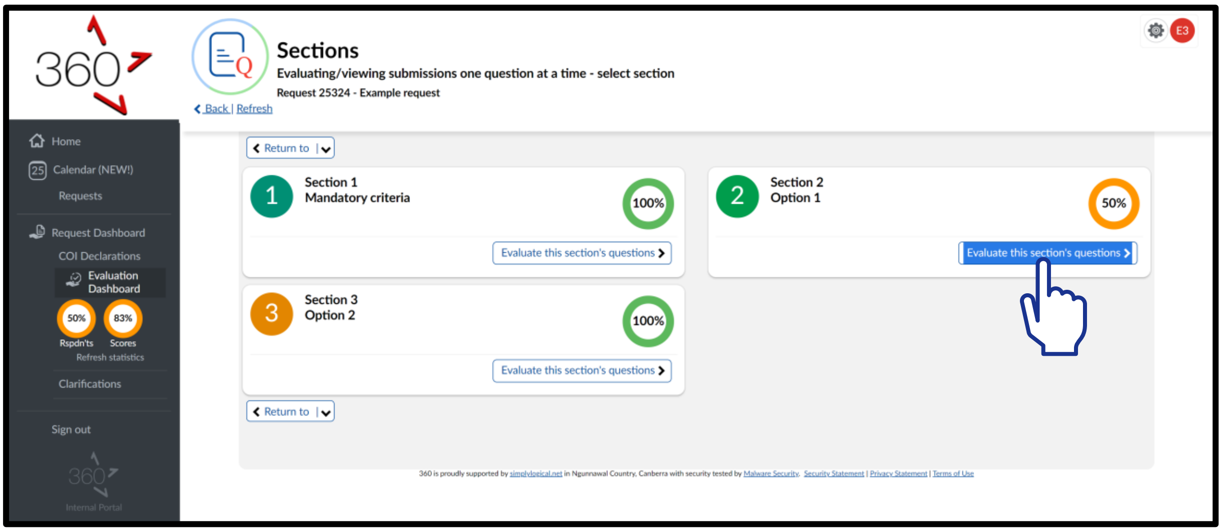
Evaluate one question at a time

The one question at a time view is best when responses to a single question need to be compared against each other – apples vs apples comparisons.

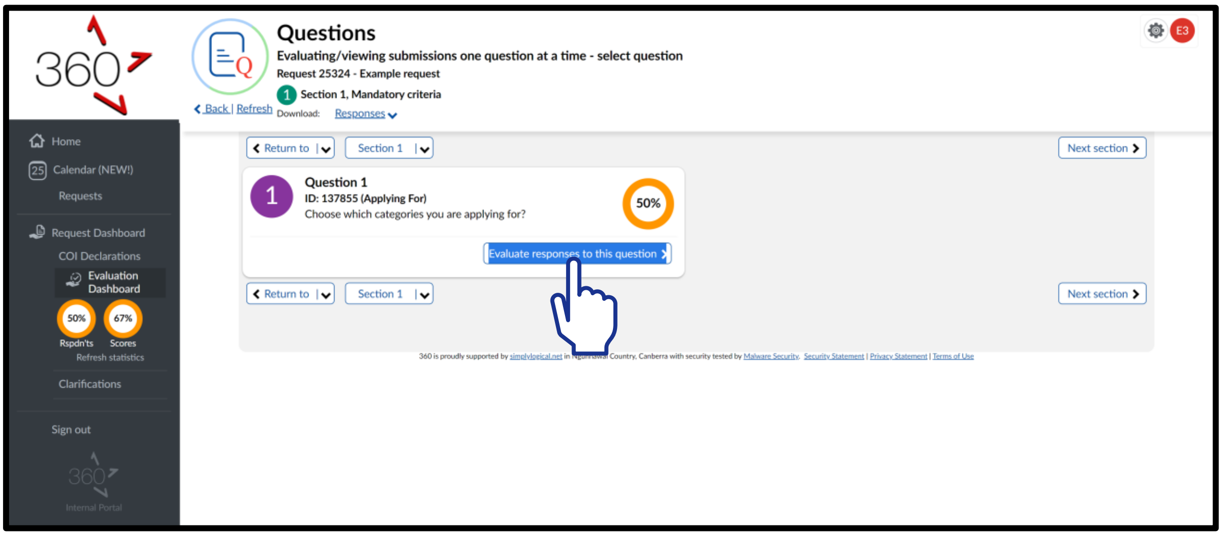
To evaluate one respondent at a time:

Select section → Select question → Evaluate responses → Click Next

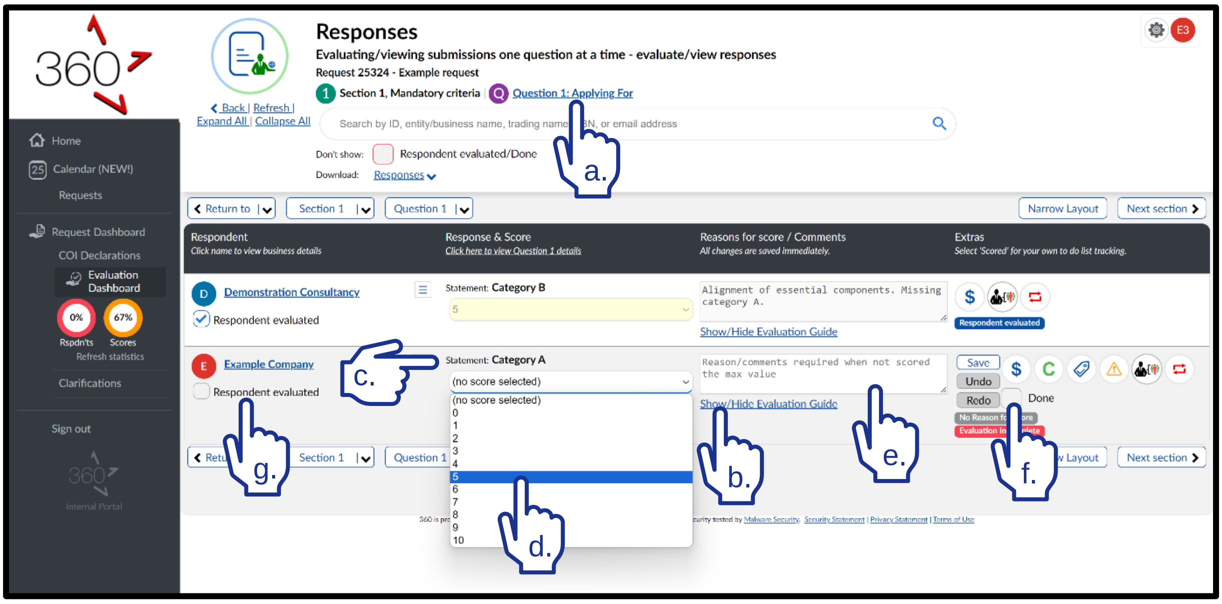
1. Select a section

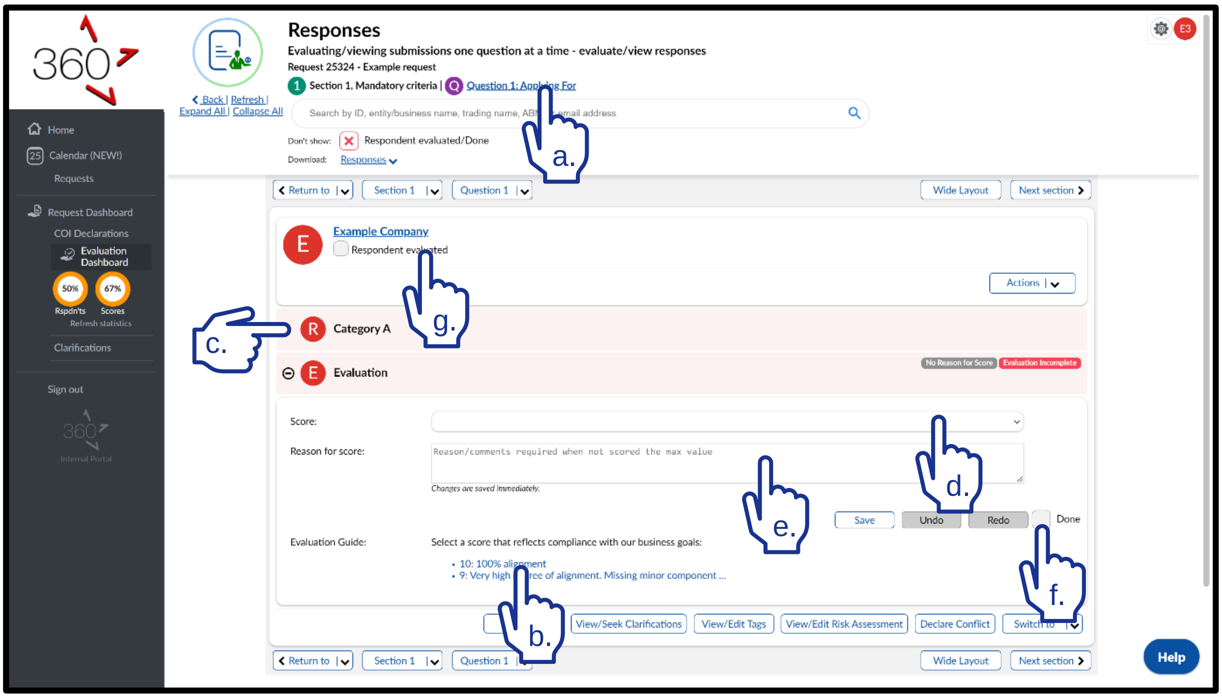


2. Select a question (if prompted)



3. Evaluate the responses by:
    a. Re-reading the question (the criteria)
    b. Re-reading the evaluation guidance
    c. Reading the responses
    d. Scoring as per the evaluation guidance
    e. Entering a reason for your score if required
    f. Marking the response as done (scored)
    g. Marking the respondent as evaluated



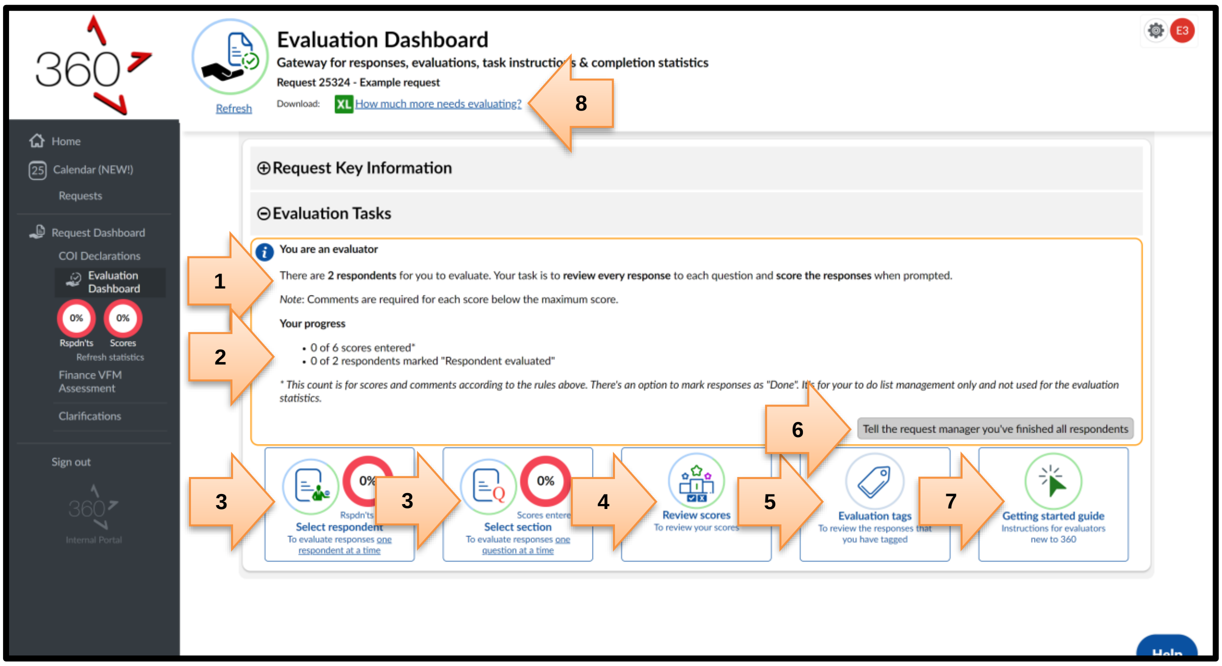


Features found on each page

Evaluation dashboard

The **Evaluation Dashboard** displays:

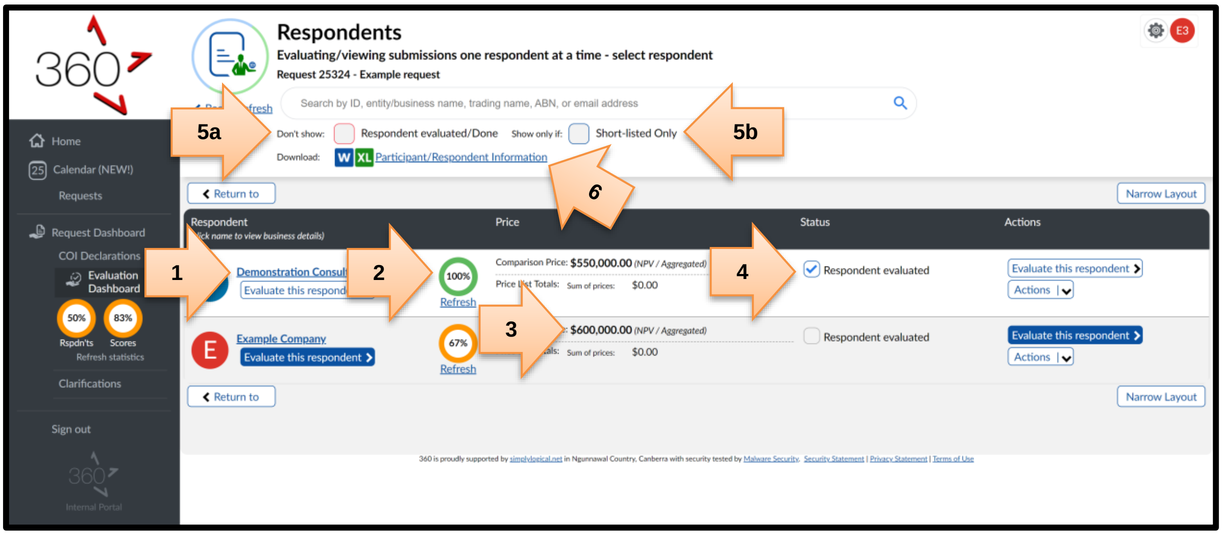
1. Instructions
2. Your progress
3. Different ways to view responses and scores
4. A view so can review your scores and, if required, make recommendations
5. Evaluation tags
6. A button so you can tell the request manager that you've finished
7. An evaluation guide (which may be this document or one specific to your organisation)
8. A download so you can see how much more needs evaluating in detail



Respondents – when evaluating one respondent at a time

The **Respondents** list displays:

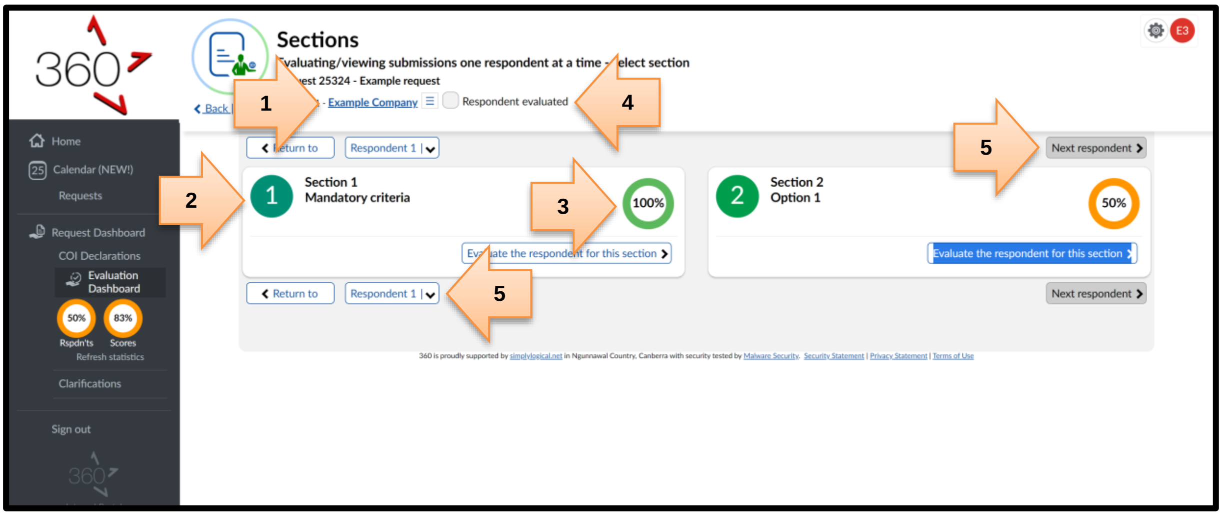
1. The name of each respondent (as a link that displays more details)
2. Your progress evaluating each respondent
3. The respondents' comparison price (if applicable and permitted)
4. A tick-box to mark **Respondent evaluated**
5. Filter options:
    a. Don't show the evaluated respondents
    b. Only show the short-listed respondents
6. A variety of download options that may be helpful when checking to see if you have a conflict of interest



Sections – when evaluating one respondent at a time

The **Sections** (one respondent at a time) list displays:

1. The name of the selected respondent (as a link that displays more details)
2. The name of each section that is to be evaluated
3. Your progress evaluating each section (for the selected respondent only)
4. A tick-box to mark **Respondent evaluated**
5. Options to select a different respondent



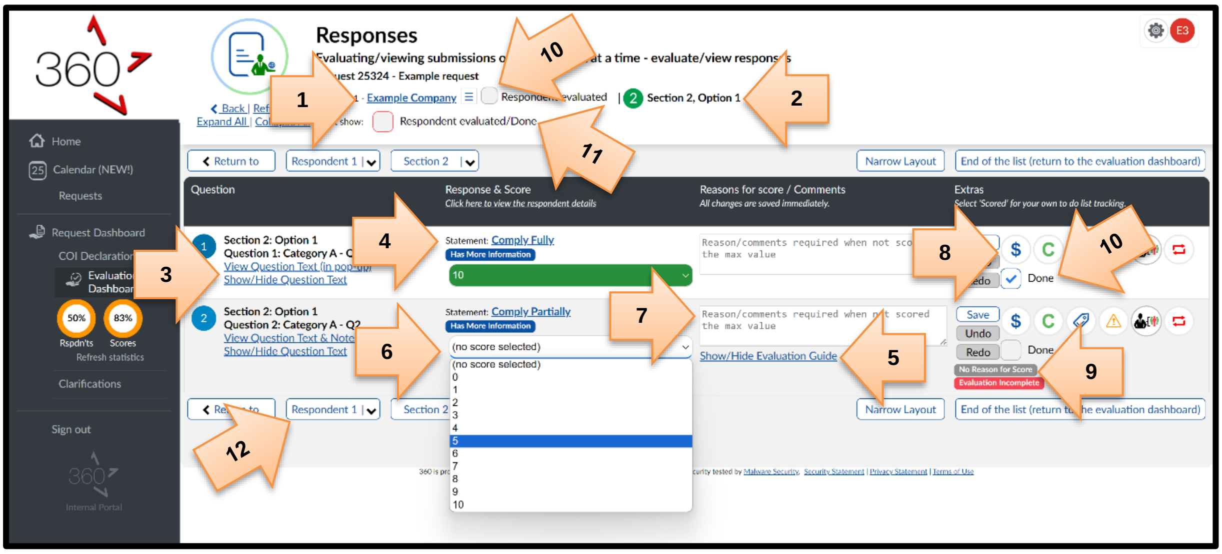
Responses – when evaluating one respondent at a time

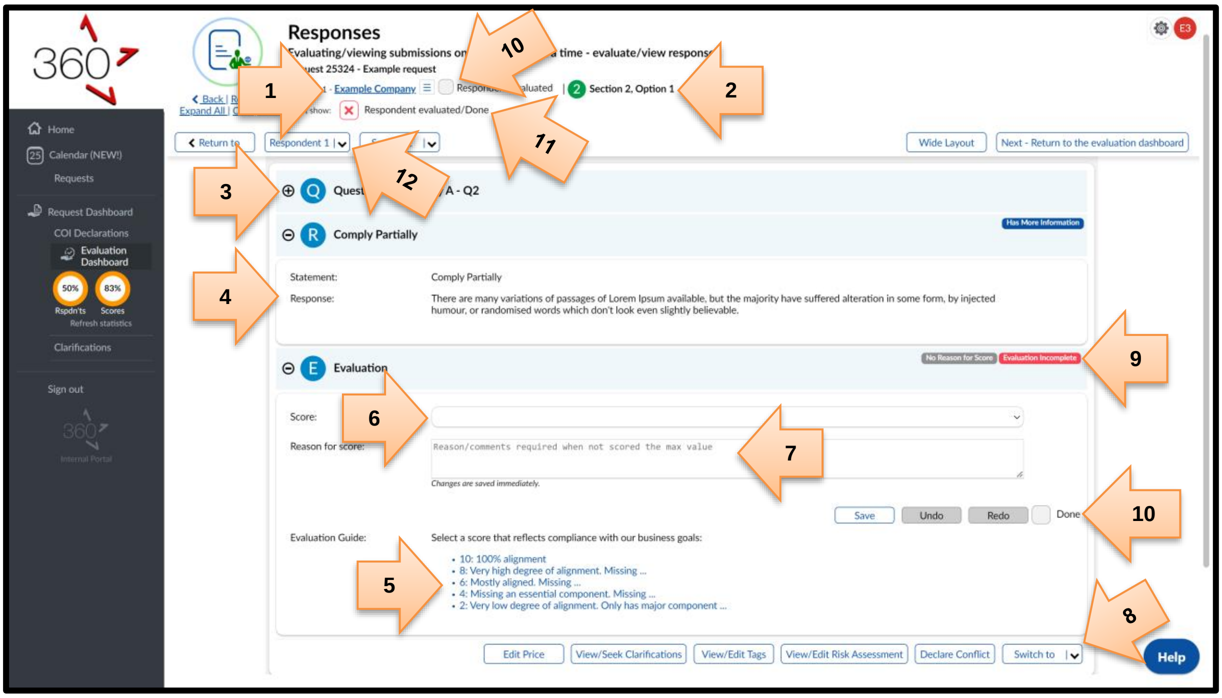
The **Responses** (one respondent at a time) list displays:

1. The name of the selected respondent (as a link that displays more details)
2. The selected section's number and name
3. Expandable sections to display the question text and instructions to respondents
4. The response, when applicable, as a link in the wide layout and onscreen in the narrow
5. Evaluation guidance with time saving short cuts (if configured)
6. Drop-downs for selecting scores
7. Text-areas for entering reasons for your scores and other comments
8. A range of commands to perform additional actions (if applicable and permitted):

- Edit the comparison price
- Seek clarification
- Add/edit evaluation tags
- Record risk assessments
- Declare a conflict
- Switch views

9. Status indicators
10. Tick-boxes to mark the response evaluation as **Done** and **Respondent evaluated**
11. Filter option to not show the evaluated respondents and responses that are done
12. Options to select a different respondent or section

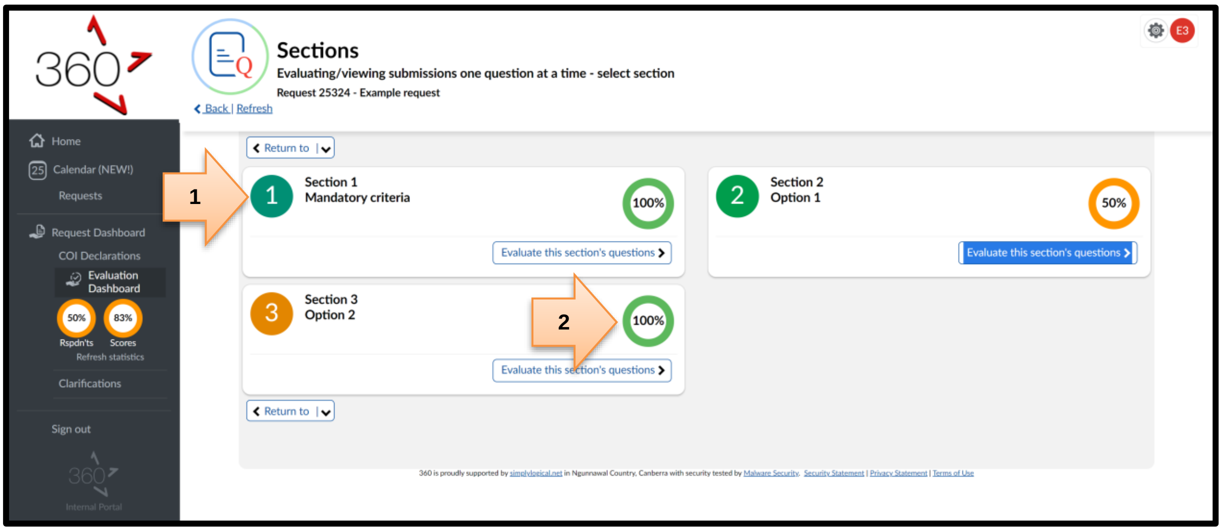




Sections – when evaluating one question at a time

The **Sections** (one question at a time) list displays:

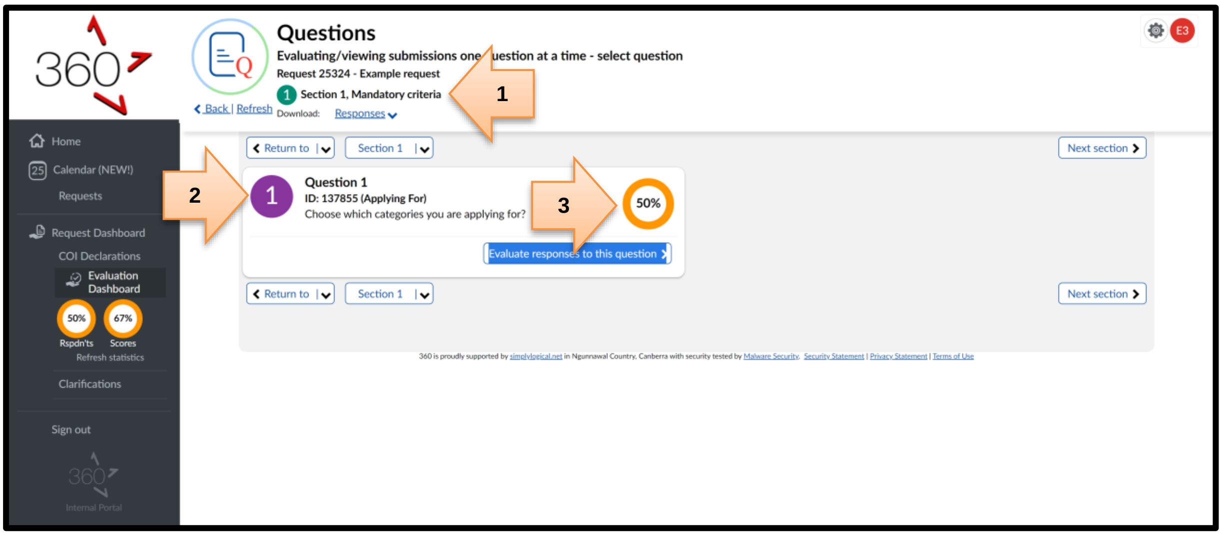
1. The name of each section that is to be evaluated
2. Your progress evaluating each section (for all respondents)



Questions – when evaluating one question at a time

The **Questions** (one question at a time) list displays:

1. The selected section's number and name
2. The name and number of each question that is to be evaluated
3. Your progress evaluating each question (for all respondents)

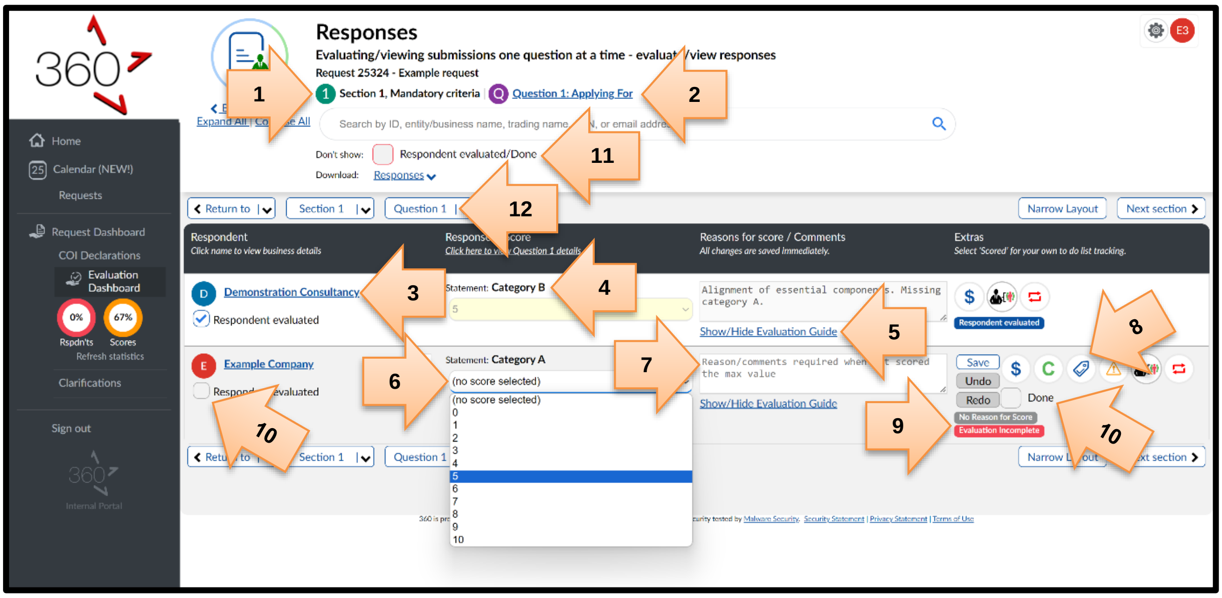


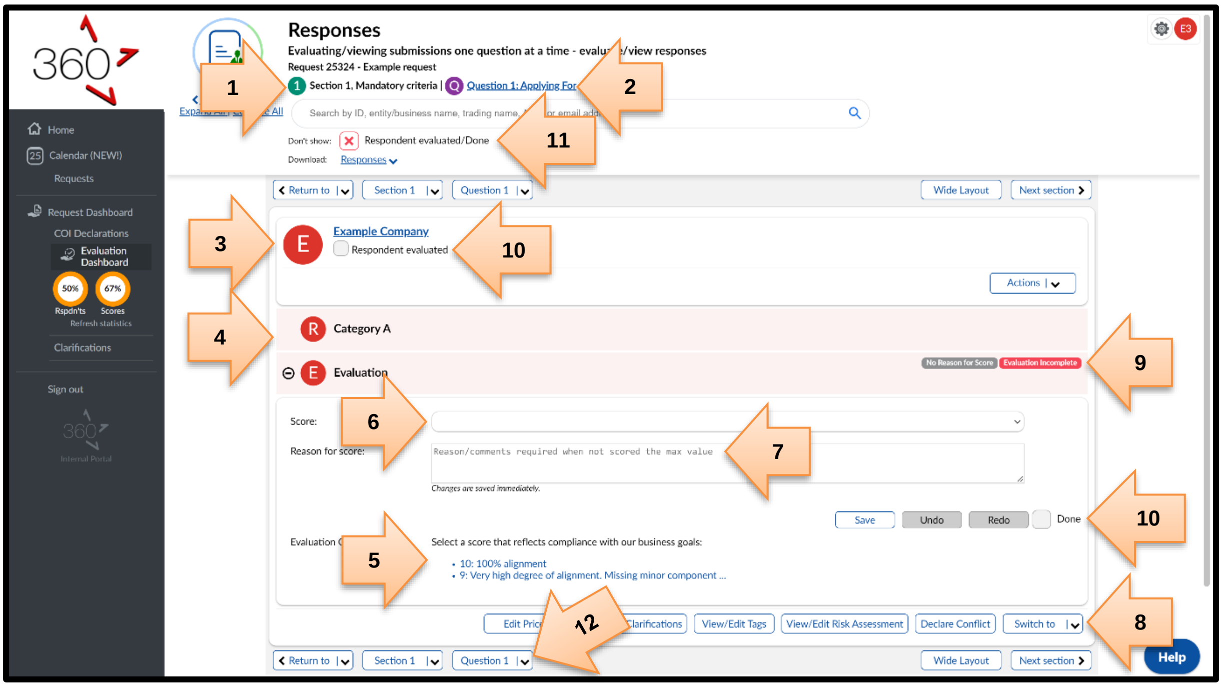
Responses – when evaluating one question at a time

The **Responses** (one question at a time) list displays:

1. The selected section's number and name
2. The name and number of the selected question (as a link that displays more details)
3. The name of each respondent (as a link that displays more details)
4. The response, when applicable, as a link in the wide layout and onscreen in the narrow

5. Evaluation guidance with time saving short cuts (if configured)
6. Drop-downs for selecting scores
7. Text-areas for entering reasons for your scores and other comments
8. A range of commands to perform additional actions (if applicable and permitted):
    - Edit the comparison price
    - Seek clarification
    - Add/edit evaluation tags
    - Record risk assessments
    - Declare a conflict
    - Switch views
9. Status indicators
10. Tick-boxes to mark the response evaluation as **Done** and **Respondent evaluated**
11. Filter option to not show the evaluated respondents and responses that are done
12. Options to select a different section or question

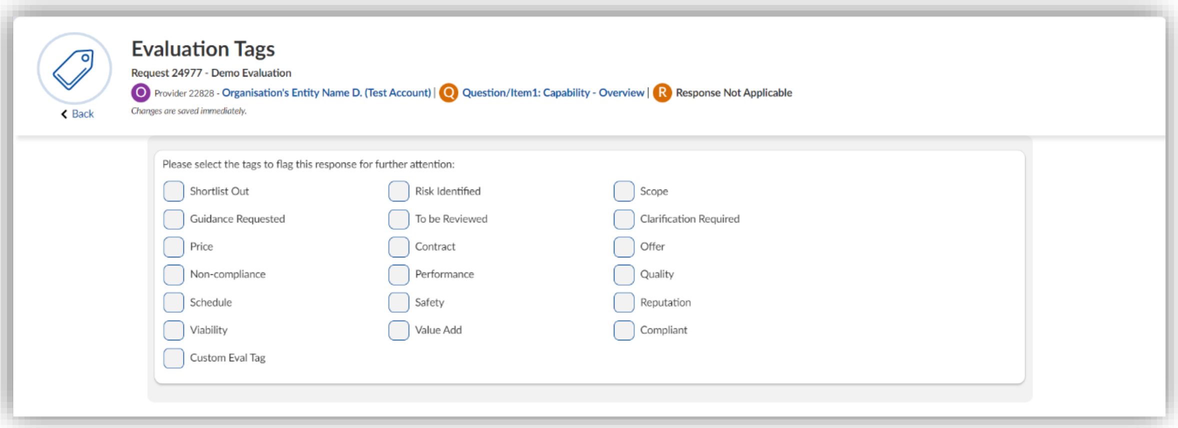




Additional features

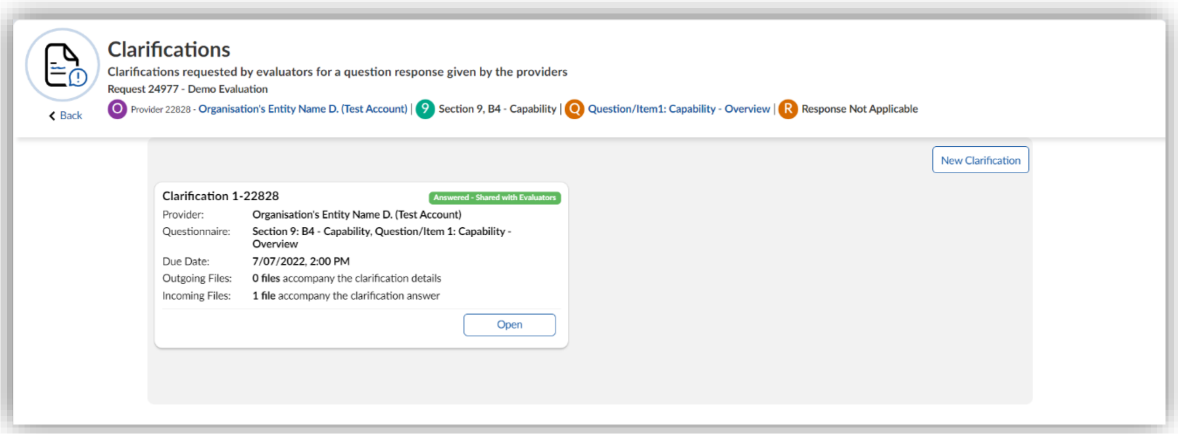
Evaluation tags

Tags allow evaluators to quickly mark a response with any number of pre-defined terms such as “Guidance Requested” and risk indicators “Scope” and “Quality”. The request manager can review the tags and follow-up as appropriate.



Clarifications

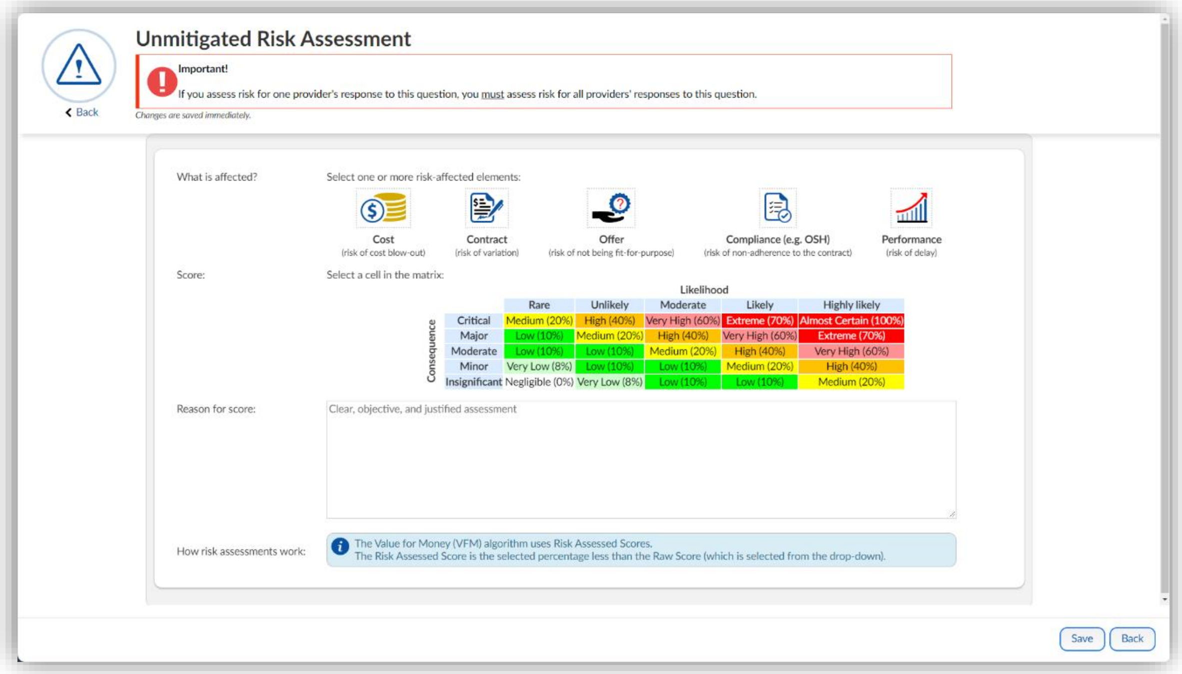
Clarifications allow evaluators to seek more information from a respondent.



Request managers must review each clarification and the respondent’s newly submitted information. If necessary, the request manager can seek follow-up clarifications.

Risk assessments

Risk assessments are used to calculate risk assessed scores. The likelihood and consequence of an unmitigated risk is used to reduce the initial score by a set percentage.



	Rare	Unlikely	Moderate	Likely	Highly likely
Critical	Medium (20%)	High (40%)	Very High (60%)	Extreme (70%)	Almost Certain (100%)
Major	Low (10%)	Medium (20%)	High (40%)	Very High (60%)	Extreme (70%)
Moderate	Low (10%)	Low (10%)	Medium (20%)	High (40%)	Very High (60%)
Minor	Very Low (8%)	Low (10%)	Low (10%)	Medium (20%)	High (40%)
Insignificant	Negligible (0%)	Very Low (8%)	Low (10%)	Low (10%)	Medium (20%)

Risk assessments are best suited to risk-based criteria such as work health and safety policies, practices, and incident history.

> ***Important!***
>
> ***If you assess risk for one response, you must assess risk for all responses to the same question.***