

REF: EF/COR002

# ICL Pathway Memorandum

**To:** EFTPOS ITT Distribution  
**From:** Chris Plunkett  
**Date:** 5 December 1997  
**Re:** EFTPOS ITT Assessment Process

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## 1 ASSESSORS LIST

| Assessor        | Perspective           |           |
|-----------------|-----------------------|-----------|
| Tony Openheim   | Pathway               | Confirmed |
| Steve Reed      | Commercial            | Confirmed |
| Dominic Barton  | Business Opportunity  | Confirmed |
| Graham King     | Risk Assessment       | ?         |
| Barry Procter   | Security              | Confirmed |
| David Groom     | Quality               | Confirmed |
| Ian Honnor      | YR2000                | Confirmed |
| Jan Holmes      | Procurement Process   | Confirmed |
| Dave Cooke      | Requirements          | Confirmed |
| Peter Wiles     | Architecture          | Confirmed |
| Pete Jeram      | Rel.3 Programme       | Confirmed |
| Phil Crowther   | Design                | Confirmed |
| Dave Quick      | Host Devt.            | Confirmed |
| Gareth Jenkins  | Agent Devt.           | Confirmed |
| Simon Palladino | System Testing        | ?         |
| Mark Taylor     | Bus.Integrity Testing | ?         |
| Mik Peach       | Support               | Confirmed |
| Martin Riddell  | Operations            | ?         |

## 2 OBJECTIVE

The objective of the assessment is to shortlist the most suitable EFTPOS Host software product and supplier from the 3 suppliers' proposals against the requirements stated in the ITT. This involves an assessment of their proposal documents, taking up customer references, individual supplier meetings and shortlisting based on the outputs of these activities.

Subsequently we will evaluate the shortlisted supplier's product, do credit checks etc. and negotiate a contract. These activities have to be completed successfully before any contract is signed.

## 3 TIMETABLE

|                      |               |
|----------------------|---------------|
| Assess Proposals     | 8-17 December |
| Assessors' Meeting   | 18 December   |
| Document Conclusions | 19 December   |
| Christmas Break      |               |
| Supplier Meetings    | 5-14 January  |
| Shortlisting         | 15-23 January |

## 4 PROPOSAL ASSESSMENT

### 4.1 WHICH REQUIREMENTS SHOULD YOU ASSESS?

Each assessor should assess each proposal from their own perspective (identified above); this means assessors need only evaluate responses to a subset of the requirements.

I have devised an assessment form which includes a requirement / assessment perspective matrix. If you feel you should add or remove requirements from your subset, please identify the changes and be consistent in assessing the same subset for all suppliers. This will enable us to score the responses fairly.

Suppliers that do not provide a positive response for mandatory requirements will be excluded.

### 4.2 SCORING

The purpose of scoring is to check suppliers' proposals meet the requirements in the ITT so, even if the prose is weak, if a response meets the requirement it scores 5. The assessors meeting is the forum to discuss any soft assessment criteria you may have. If in your view the supplier is proposing some future product or service development, please add a comment to this effect as we need to understand the risk.

Assessors will be required to score each response:

0      Doesn't meet requirement

- 3 Partially meets requirement
- 5 Totally meets requirement

Weightings will be applied to scores using the following multipliers:

- 9 (M) Mandatory
- 3 (I) Important
- 1 (D) Desirable

Functional and commercial aspects will be assessed separately – we don't want to buy fully functional software from a weak supplier.

If you have any comments regarding a supplier's response to a requirement, please note them on the assessment form. We will discuss these at the assessors' meeting.

Importantly, if you need clarification, you should note questions you wish to ask at the supplier's meeting on the assessment form. If you need urgent clarification we can contact suppliers immediately. I need to know about any supplier contacts we make during the assessment.

### **4.3 ASSESSMENT FORMS**

Please complete the assessment forms either electronically or in blue ink.

Please identify the supplier and your name on each assessment form.

Please note your scores, comments and questions for each proposal.

Please return your assessments to me by close of play 17/12/97.

## **5 CUSTOMER REFERENCES**

These will be taken up during the assessment period and reported at the assessors' meeting.

## **6 ASSESSORS' MEETING**

This meeting is to share verbal feedback on the proposals.

We need to capture any issues or questions for suppliers. This is particularly important so we don't forget anything during the Christmas break.

## **7 SUPPLIER MEETINGS**

A core of 3-4 assessors will attend these meetings. Any documented questions will be asked and the responses will be noted and distributed along with a more general assessment gained through the meeting. If there are questions requiring specialist knowledge you may be asked to attend a particular meeting.

## **8 SHORTLISTING**

The outputs of the preceding activities will be analysed from both a functional and commercial perspective and a short report will be produced that will recommend which supplier to shortlist. The core of 3-4 assessors will meet to review the report.