

## Procurement / Evaluation Process for funding proposals under MEDIN

### Introduction

A key aspect of the way that MEDIN operates is to engage its partners in developing resources and capabilities in support of its main objective: To improve access to and stewardship of marine data and information.

Whilst many activities may be carried out as “in-kind” effort, some will necessarily require funding, especially if they require a significant commitment of resources. For proposals to a value of under £10,000 this judgement will be made by the MEDIN Core team, for proposals over this limit the judgement will be referred to the Executive Team (usually by email)

To date MEDIN has not had an agreed process by which proposals can be procured and evaluated. This paper proposes a structured approach, which is designed to be consistent with the process applied by the Natural Environment Research Council.

### Outline of Proposed Procurement / Evaluation Process

It has been agreed that the Sponsors’ Board is responsible for the top level allocation of funds to the different MEDIN Work Streams and the activities to be supported within the Work Streams. It has been agreed that the remit of the Executive Team includes the task: “To approve detailed allocation of funds and manage the budget within the overall work programme.”

Bearing this range of responsibilities in mind we propose the following cost-related requirement list.

Cost range	Quotes / tender issue	Evaluation	Higher level Approval	Administrative Requirements
Less than £5,000	No quotes required	At the discretion of the MEDIN Core Team / Working Group	MEDIN Core team or Working Group chairs where they exist.	Purchase order, listing deliverables, and single invoice on completion
£5,000 - £10,000	3 informal quotes to be obtained (Email quotes acceptable)	Opinion of independent reviewers should be obtained against the evaluation criteria	MEDIN Core team or Working Group chairs where they exist.	Short description includes timetable and deliverables, - Purchase order and invoice. Possibly staged payments
£10,000 - £20,000	3 Formal quotes required	Opinion of independent reviewers should be obtained against the evaluation criteria	Email approval from Exec Team	Short description includes timetable and deliverables, - Purchase order and invoice. Staged payments
Greater than £20,000	Competitive tender action required	Opinion of independent reviewers must be obtained against the evaluation criteria	Agenda Item for discussion by Exec Team	Contract between Supplier and NERC - Purchase order and invoice(s). Purchase order and invoice. Staged payments

In the case of any exceptions (including single tender) from the above process, a specific case should be made to account for the exception.

No parties with a vested interest will be allowed to participate in the evaluation or approval process. Where the Executive Team are required to make a decision, the decision will rest on a majority vote from dis-interested parties.

**Evaluation Criteria:**

Where review from independent experts is required (all activities costing more than £5,000), then the proposed activity should be evaluated according to the following criteria.

1. Does it fit within the MEDIN remit? (We could define specific remits for each work stream)
2. Is the work programme clear (with well defined deliverables and dates) and realistic (can it be achieved in time)?
3. Are appropriate resources allocated to the task (are the personnel suitably experienced, do they have access to necessary IT skills and resources).
4. Are the costs "reasonable"? (Is there an in kind contribution?)

Score from 0-4: 0 – Reject, 1- revision needed before resubmission, 2-acceptable with conditions, 3- acceptable as it stands, 4-outstanding

	<b>Score</b>	<b>Comments</b>
Fit MEDIN DAC funding requirements		
Well defined programme		
Appropriate Resources		
Cost		