



Checkliste zur Bewertung von Angeboten und Bietern (English version)¹

Checklist to analyse the bids

Qualification criteria and evidence

To avoid getting bids of planners who do not meet the required qualification you should state qualification criteria and evidence:

- Studies completed in which area? (e.g. architecture, building services engineering, facility management)
- Further education e.g. energy consultant
- References: professional experience in the field of planning of e.g. 10 years
- Reference projects

Deadline for submission of the bid: XX.XX.20XX

1. Checklist to analyse the bid

	Description	Yes?
Is time estimated for a survey of the site?	With a first survey the bidder gets an idea of the site. The orientation, shading objects like other buildings, trees or mountains have a big influence on the energy need of a building and the useable equipment. Architecture and implemented technologies can vary significantly. If the bidder knows these issues he can plan a building which will work under these certain conditions.	<input type="checkbox"/>
Is a time plan developed and are regular meetings included?	During regular meetings participants discuss the progress, problems and solutions they worked out. These meetings are very helpful to figure out difficulties regarding issues of different technical, economic and legislative nature and to discuss how to solve them – always having the common goal in mind.	<input type="checkbox"/>
Is it planned to include additional professions in the meetings? <i>E.g. architects, daylight planners, HVAC designers,</i>	One single person can't be an expert in all fields. If it is planned to integrate other professions the bidder is aware of and respects this fact and he is likely to involve experts to guarantee a high quality of the result.	<input type="checkbox"/>

¹ This check list has been elaborated by one of the Austrian partners in the project, the Austrian Energy Agency. <http://www.energyagency.at/>

<p><i>energy consultants, experts for building ecology and building physics, experts for structural engineering, etc.</i></p>		
<p>Is a start meeting with all participating parties planned?</p>	<p>At a start meeting the involved parties get to know each other and get a common understanding of the project and its goals.</p>	<p><input type="checkbox"/></p>
<p>Are references mentioned?</p>	<p>If references are mentioned, the bidder wants to show his successful projects to underline his qualities. If there are no references mentioned in the bid or in an interview, there may not be enough experience.</p>	<p><input type="checkbox"/></p>
<p>Is there information about reference cases?</p>	<p>Further information about the reference cases helps to assess his activities.</p>	<p><input type="checkbox"/></p>
<p>Are the references similar to your planned building?</p>	<p>Every building category has its specific requirements. Therefore it is advantageous if the examples equal your project. The bidder wants to show that he is experienced in that field and he is likely to meet your requirements.</p>	<p><input type="checkbox"/></p>
<p>Are contact persons for reference cases mentioned?</p>	<p>If the bidder added contact persons for the reference cases, he gives you the opportunity to talk to his customers and get more and different information from them.</p>	<p><input type="checkbox"/></p>
<p>Is a BlowerDoor test planned? <i>A BlowerDoor test is a differential pressure method to measure the tightness of a building.</i></p>	<p>The BlowerDoor test is a quality ensuring tool. If it is offered or recommended in the bid, the bidder is interested in ensuring the quality of the workmanship.</p>	<p><input type="checkbox"/></p>
<p>Is a Thermography measurement planned? <i>A Thermography measurement is a procedure to check the thermal weakness of a building.</i></p>	<p>The Thermography measurement is also a quality ensuring tool. If it is offered or recommended in the bid, the bidder is interested in ensuring the quality of the workmanship.</p>	<p><input type="checkbox"/></p>
<p>Is there evidence of his Know-How? <i>E.g. certificates</i></p>	<p>If the bidder attended several relevant courses it shows that he wants to be up to date to be able to offer his customer the best suitable solution.</p>	<p><input type="checkbox"/></p>
<p>Are companies considered which are close to the</p>	<p>In order to minimise transport ways and to optimise</p>	<p><input type="checkbox"/></p>

planned building?	availability, companies located near the planned building should be preferred, but the quality of work should be more decisive than the distance.	
Is it mentioned to use regionally available resources?	Using regionally available resources minimises the transportation ways, save the environment and strengthen the added value.	<input type="checkbox"/>
Are simulations recommended?	Different programs allow to simulate the behaviour of a building and analyse effects, advantages and disadvantages of different solutions. So the building, its equipment, the energy consumption, the user satisfaction, etc. can be planned very exactly when undertaking simulations.	<input type="checkbox"/>
Is the bidder offering innovative strategies and technologies? <i>E.g. passive cooling technologies, innovative façade concepts, use of solar energy, heat pumps, wood pellets, etc</i>	If the bidder is offering these innovative approaches and he has experience with them it shows, that he is up to date and he is interested in keeping the running costs of a building as low as possible and keeping the user satisfaction as high as possible at the same time.	<input type="checkbox"/>
Does the bidder refuse air conditioning systems?	If he is tending to avoid active air conditioning systems it shows that he wants to avoid unnecessary cooling demand.	<input type="checkbox"/>
Does the user/building owner have enough influence capability?	The user/building owner should have influence capability. A good planner knows that the user's satisfaction depends on the extent to which his needs and wishes are considered.	<input type="checkbox"/>
Did the bidder inform you about energy management?	To keep the running costs of a building as low as possible it is important to watch the energy consumptions to analyse it and to react. An energy management system includes all these actions.	<input type="checkbox"/>
Does the bidder consider training courses for users in order to ensure right operation of the building?	Users of a building have a big influence on the buildings energy performance. They have to be informed accurately about the building, the technology and how to operate it.	<input type="checkbox"/>



2. Checklist to analyse the first interview

	Description	Yes?
Did the bidder take enough time to inform you and to answer your questions?	If the bidder took enough time to answer your questions, he is interested in your requirements and doesn't only want to realise <i>his</i> concept.	<input type="checkbox"/>
Does the bidder inform you about risks? <i>E.g. time adjustments, useful insurances, etc.</i>	If this information is given, you know about the risks and eventually arising costs in advance and he gives you the chance to react early in case.	<input type="checkbox"/>
Does the bidder take the use of the building into consideration?	The major task of the building is to meet the requirements of the user and the building owner. A building is well planned, if these requirements are one of the main points of interest.	<input type="checkbox"/>
Is the bidder interested in energy targets?	If the bidder is often arguing with resulting energy savings or stating problems with consumption of specific solutions, he is likely to consider this issue also in further phases.	<input type="checkbox"/>
Does the bidder have own recommendations? <i>E.g. changes to the site, changes to existing plans, further ideas etc.</i>	If parts of a concept already exist and the bidder is advertent and has ideas to improve the concept to lower the energy consumption he is likely to consider this issue in further phases.	<input type="checkbox"/>

If most of the questions are answered with "Yes", the bidder is likely to pay special attention to energy issues, users comfort and to cooperate with other professions to guarantee a high quality of the building. The e.g. three "best" bidders should be invited for an interview.