INSERT PROCUREMENT NAME AND NUMBER HERE

REQUEST FOR PROPOSAL

APPLICATIONS CLOSE AT 2PM ON 20 MARCH 2015

The procurement manager should tailor this document insofar as it is relevant to the procurement event. All red text (notes and suggestions to the procurement manager) should be replaced with black text (actual text for the RFP document) or simply deleted if irrelevant.

Section 7 – Terms and Conditions should be reviewed and approved by the company's legal counsel or replaced with the company's standard terms and conditions for such procurement events.

Contents

Preamble 4

1.1 Purpose of this Document 4

1.2 Document Structure 4

1.3 The Buyer Contact Person 5

1.4 Disclaimer 5

2 Introduction 7

2.1 Background and Current Situation 7

2.2 Description of Procurement Event 7

2.3 Business Context 7

2.4 Business Benefits 7

2.5 Request for Proposal 7

2.6 Request for Proposal Process Overview 7

2.7 Indicative High-level Timetable 8

3 Statement of Works – Technical 9

3.1 Statement of Works 9

3.2 Completing Schedule B 9

4 Statement of Works – Commercial 11

4.1 Completing Schedule C 11

4.2 Completing Schedule D 11

4.3 Additional Pricing Instructions 12

4.4 Contract Term 13

4.5 Payment Terms 13

5 Instructions to Bidders 14

5.1 General 14

5.2 Lodgement of Responses 14

5.3 Respondents Must Inform Themselves 17

5.4 Code of Practice for Procurement 18

5.5 Restrictions on Communicating with Staff 18

5.6 Addenda to this Request for Proposal 18

5.7 Rejection of Proposals 19

5.8 Briefing to Potential Respondents 19
6 Evaluation 21
6.1 General 21
6.2 The Evaluation Process 21
6.3 Mandatory Requirements 23
7 Terms and Conditions 24
7.1 General 24
7.2 Definitions and Interpretations 24
7.3 The Buyer's Rights 26
7.4 Exclusion of Certain Responses 27
7.5 Amending Your Response 27
7.6 Negotiations for Contract 27
7.7 The Buyer's Right to Amend and/or Cancel the RFP 27
7.8 Costs for Preparing Responses 28
7.9 Acknowledgments, Release and Indemnity 28
7.10 Confidentiality 28
7.11 Privacy 30
7.12 Miscellaneous 30
8 Annexure 1 – Glossary 31

Schedule A – Company Information

Schedule B – Technical Requirements

Schedule C – Commercial Requirements

Schedule D – Financials Schedule

PREAMBLE

1.1 PURPOSE OF THIS DOCUMENT

The purpose of this document is to list in detail, the statement of works and terms and conditions surrounding this Request for Proposal (RFP). It includes a description of the rules concerning submission of responses and the activities associated with the evaluation of those responses.

Also included is a detailed description of both the existing environment in which the company issuing this RFP (referred to throughout this document as "The Buyer") operates, and, the vision The Buyer is seeking to implement.

This document and the attached schedules should provide everything needed by the bidders to plan, prepare and deliver a comprehensive response to this RFP.

1.2 DOCUMENT STRUCTURE

This RFP document comprises the following sections:

Section 1 – Preamble: Provides some introductory remarks that are of interest to the bidder including an outline of the structure of the document and the contact details of The Buyer contact person.

Section 2 – Introduction: Provides a high-level overview of the context within which this RFP is issued, a brief description and key milestones of the procurement event, its expected business benefits and, a high-level overview of the RFP process.

Section 3 – Statement of Works - Technical: Describes in detail, the scope of this procurement event from a technical and operation perspective. This section is to be read in conjunction with Schedule B – Technical Requirements.

Section 4 – Statement of Works - Commercial: Describes in detail, the scope of this procurement event from a commercial and financial perspective. This section is to be read in conjunction with Schedule C – Commercial Requirements and Schedule D – Financials Schedule.

Section 5 – Instructions to Bidders: Contains specific instructions required by the bidder to formulate, plan, design, document and present a compliant offer to this RFP.

Section 6 – Evaluation: Contains a summary description of the process to be used by The Buyer to assess and evaluate offers.

Section 7 – Terms and Conditions: Describes the terms of conduct to be agreed by the bidder in submitting a response to this RFP.

In addition, the following supporting documents form part of the RFP pack:

Schedules:

- *Schedule A – Company Information*
- *Schedule B - Technical Requirements*
- *Schedule C – Commercial Requirements*
- *Schedule D – Financials Schedule*

Appendices: (insert details or delete heading entirely, as required)

- *Appendix A – Insert as required*
- *Appendix B – Insert as required*
- *Appendix C – Insert as required*

1.3 The Buyer Contact Person

Refer all requests for information about this RFP and the RFP process to the following representative of The Buyer:

Name	(insert details here)
Telephone	(insert details here)
Facsimile	(insert details here)
Mobile	(insert details here)
Email	(insert details here)
Address	(insert details here)

Table 1 - Buyer Contact Person Details

1.4 Disclaimer

The issue of this RFP does not commit or otherwise oblige The Buyer to proceed with any sub-processes, tasks or activities of the procurement process.

Whilst the information contained in this RFP has been formulated with all due care, The Buyer does not warrant or represent that the information is free from errors or omissions. The information is made available on the understanding that The Buyer and its respective employees and agents, shall have no liability (including liability by reason of negligence) for any loss, damage, cost or expense incurred or arising by reason of any person using or relying on the information and whether caused by reason of any error, omission or misrepresentation in the information or otherwise.

Furthermore, The Buyer takes no responsibility for the accuracy, currency, reliability and correctness of any information included in this RFP.

The Buyer does not guarantee any specific amount of compensation, volume, minimum, or maximum amount of products or services under this solicitation and resulting contract.

2 INTRODUCTION

2.1 BACKGROUND AND CURRENT SITUATION

The procurement manager should provide here a brief overview about The Buyer in terms of:

- *history*
- *strategic objectives and direction*
- *current organisational structure*
- *any other relevant information about The Buyer which would provide context upon which a bidder may frame a proposal*

2.2 DESCRIPTION OF PROCUREMENT EVENT

Insert a brief description of the procurement event.

2.3 BUSINESS CONTEXT

Insert a brief description of the business context for the procurement event (with reference to the current situation described above).

2.4 BUSINESS BENEFITS

List the key business benefits of the procurement event.

2.5 REQUEST FOR PROPOSAL

Proposals are invited from organisations wishing to be bid for the proposed contract of works defined in this RFP. The scope of works under the proposed contract includes (insert very brief summary here).

Note that the above is a very brief overview of the proposed contract and the scope of works. More details are included in this RFP in Section 3 - Statement of Works - Technical.

2.6 REQUEST FOR PROPOSAL PROCESS OVERVIEW

The objective of the RFP is to select the most suitable bidder(s) to provide to The Buyer, the products and services outlined in this RFP. The RFP process will be conducted to gather and evaluate responses from bidders for potential award. All qualified bidders are invited to participate by submitting responses, as further defined in detail later in this RFP. After evaluating all bidders' responses received prior to the closing date and following negotiations (if any) and resolution of any

contract exceptions, the results of the RFP process will be publicly announced, including the names of all participating bidder(s) and the summary details of the final contract awarded.

Evaluation teams comprising representatives of The Buyer will evaluate RFP responses on the basis of the requirements detailed in the schedules of this RFP and other aspects as listed in Section 6 – Evaluation.

The evaluation teams will identify the responses that it considers best satisfy the requirements and will recommend a minimum of (insert number here) and a maximum of (insert number here) to be validated. The leading (insert number here) bidders may be invited to submit best and final offers.

Unless specifically stated in this RFP, The Buyer will not be liable for any costs incurred by respondents through participation in this RFP process.

2.7 Indicative High-level Timetable

An indicative timetable for the RFP process is shown below:

Activity	Date
RPF Opens	(insert date here)
RFP Closes	(insert date here)
Bidder Induction Presentation	(insert date here)
Bidder Presentations	(insert date here)
Questions No Longer Permitted	(insert date here)
Evaluation Completed	(insert date here)
Successful RFP Respondent(s) Notified	(insert date here)
Contract Awarded	(insert date here)
All Contracted Work Completed	(insert date here)

Table 2 – Indicative High-level Timetable

3 STATEMENT OF WORKS – TECHNICAL

4 ANNEXURE 1 – GLOSSARY

Acronym	Meaning of Acronym or Term	Comments
	Activity	The fourth level of the process model where Level 1 = process; Level 2 = sub-process; Level 3 = task and Level 4 = activity
	Bidder	Potential Bidder – One of a number of possible bidders who have yet to be invited to submit a bid Bidder – An individual or organisation that has been invited, and is agreeable, to submit a bid in a competitive procurement event Leading Bidder – One of a very short-list of bidders who have been assessed as potential winners, after the first round of evaluations Successful Bidder – A bidder that is finally selected to enter into a contractual arrangement with The Buyer Unsuccessful Bidder – All bidders other than the successful bidder(s)
	Buyer	Refer to The Buyer
EoI	Expression of Interest	Refer to Procurement Management – Process Guide, Section 4.5.1.2. - Type of Procurement Event
	Governance	Governance refers to all aspects of governing the procurement event. It relates to processes and decisions that seek to define actions, grant power, and verify performance.
	Process	The fourth level of the process model where Level 1 = process; Level 2 = sub-process; Level 3 = task and Level 4 = activity
	Procurement Closure	The end of a procurement event where documentation is stored and no further work is expected.
	Procurement Event	The set of activities associated with buying a defined set of products and / or services using a competitive test of the market
RFP	Request for Proposal	To solicit business proposals from potential bidders, submitted through a competitive bidding process. To solicit information from potential candidates about their products and services, company's strengths, and availability to meet the needs of a buyer.
	Response or Bid	A response to the Request for EoI or to an RFx

SME	Subject Matter Expert or Subject Matter Expertise	The SME is that individual who exhibits the highest level of expertise in performing a specialised job, task, or skill within the organisation.
	Sub-process	The fourth level of the process model where Level 1 = process; Level 2 = sub-process; Level 3 = task and Level 4 = activity
	Task	The third level of the process model where Level 1 = process; Level 2 = sub-process; Level 3 = task and Level 4 = activity
	The Buyer	An individual or organisation conducting a procurement event for the purpose of selecting a successful bidder with which to enter into a contractual arrangement for the supply of goods and / or services for a defined period.
TCO	Total Cost of Ownership	The fully-inclusive cost of a bid over a set time-frame, taking into account all aspects of purchase, delivery, implementation, integration, warranty, licenses, third party products and services, maintenance and support, disposal and anything else relevant to the case. TCO are often calculated over a period of 3 to 5 years.

END OF DOCUMENT