Appendix B3 – Simple Project Tender Evaluation Plan (TEP) template (Tender selection Method 1)

Transport Infrastructure Project Delivery System

Volume 2 - Tendering for Infrastructure Works

October 2020

**Simple Project TEP Template (Tender Selection Method 1)**

|  |  |
| --- | --- |
| **Project Name** | *insert details* |
| **Project Number** | *insert details* |
| **Project Description** | *insert details* |
| **Project Manager** | Name:  Position:  Branch: |
| **Project Manager Contact Details** | Phone:  Email: |

|  |  |
| --- | --- |
| Version number: | *insert details* |
| Revision date: | *insert details* |
| File number / document number | *insert details* |

1. Brief for TAP
   1. Project objectives

|  |
| --- |
| Describe the specific objectives of the project  To delete this guidance text box, double click mouse in the left margin then press delete |

Type here

* 1. Project summary

|  |  |
| --- | --- |
| Item | Details |
| **Out turn cost estimate** | *insert details* |
| **Scope of works** | *insert details* |
| **Special Considerations** | *insert details* |
| **Project Location** | *insert details* |
| **Timeline** | *insert details* |

* 1. Stakeholders

|  |
| --- |
| A list of those who have a stake in the project. Identify their name, position, interest in project, what is required to manage their needs during tendering. Refer to Business Case or Project Plan.  To delete this guidance text box, double click mouse in the left margin then press delete |

Type here

* 1. Contract type (refer to the Project Delivery Strategy for further details)

|  |
| --- |
| State the contract type and make a reference to the Project Delivery Strategy where selection of this contract type has been justified.  To delete this guidance text box, double click mouse in the left margin then press delete |

Type here

* 1. Programme to contract award

|  |
| --- |
| List all significant target dates with provision for recording actual dates as milestones are achieved |

|  |  |  |
| --- | --- | --- |
| Milestones | Target Dates | Date achieved/notes |
| **Advertise tenders** | *insert details* | *insert details* |
| **Tender period starts** | *insert details* | *insert details* |
| **Pre-close tender meeting** | *insert details* | *insert details* |
| **Close tenders** | *insert details* | *insert details* |
| **TAP evaluation** | *insert details* | *insert details* |
| **Award contract** | *insert details* | *insert details* |
| **Commence construction** | *insert details* | *insert details* |

|  |  |  |  |
| --- | --- | --- | --- |
| HOLD POINT  Brief for TAP | | | |
| Signature: |  |  | / / |
|  | Tendering Manager |  | Date |

1. Appointment of TAP
   1. TAP membership

|  |  |  |  |
| --- | --- | --- | --- |
| List here the names and official positions of the members of the TAP for this project.  To delete this guidance text box, double click mouse in the left margin then press delete | | | |
| Role | Name | Official position | Insert Date and Signature |
| **Chairperson** | *insert details* | *insert details* | *insert details* |
| **Project representative** | *insert details* | *insert details* | *insert details* |

* 1. Convening of the panel

|  |  |
| --- | --- |
| Step | Date |
| **Pretender meeting** | *insert details* |
| **Pre-close meeting** | *insert details* |
| **Tender evaluation** | *insert details* |
| **Tender report** | *insert details* |
| **Award contract** | *insert details* |

|  |  |  |  |
| --- | --- | --- | --- |
| HOLD POINT  TAP appointed | | | |
| Signature: |  |  | / / |
|  | Tendering Manager |  | Date |

Attach any Statutory Declarations or Deeds of Confidentiality that the TAP members had to sign.

1. Documentation and communication
   1. Tender selection method (refer to the Project Delivery Strategy for further details)

 Method 1 – price only considerations

 Method 2 – price and non-price considerations (single stage process)

 Method 3 - price and non-price considerations (two stage process)

 Method 4 – project specific selection process

|  |
| --- |
| Select the tender selection method above that is applicable to the project.  To delete this guidance text box, double click mouse in the left margin then press delete |

* 1. Pre-close of tender meeting

|  |
| --- |
| Is a pre-close of tender meeting required? If so what will be discussed (agenda)? Is mandatory attendance considered necessary (if so ensure Principal is informed and that the project tender documents clearly state the meeting is mandatory).  To delete this guidance text box double click mouse in the left margin then press delete |

* 1. Tender submission

|  |
| --- |
| Define any additional documents that should be attached with tender documents  To delete this guidance text box, double click mouse in the left margin then press delete |

Type here

|  |  |  |  |
| --- | --- | --- | --- |
| HOLD POINT  Tender documents completed | | | |
| Signature: |  |  | / / |
|  | Tendering Manager |  | Date |

|  |  |  |  |
| --- | --- | --- | --- |
| HOLD POINT  Approval to invite tenders | | | |
| Signature: |  |  | / / |
|  | Principal |  | Date |

|  |  |  |  |
| --- | --- | --- | --- |
| HOLD POINT  Approval to invite tenders | | | |
| Signature: |  |  | / / |
|  | Principal |  | Date |

Procurement Delegate Endorsement

|  |  |  |
| --- | --- | --- |
| As a Procurement Delegate with the appropriate level of delegation, I am satisfied that:   * the procurement option selected is appropriate and sufficient justification has been provided * the Invitation documentation meets the requirements of the departmental procurement standards * the evaluation criteria and Conditions of Contract are appropriate for this procurement * the Invitation method selected is appropriate * the supplier market selected to invite is appropriate * the Invitation will provide value for money for the department.   I am aware of my responsibilities under the probity and accountability provisions of the Queensland Procurement Policy and I acknowledge that I am accountable for this decision. | | |
| Invitation name: | *insert details* | |
| Invitation number: | *insert details* | |
| Name: | *insert details* | |
| Position Title: | *insert details* | |
| Branch: | *insert details* | |
| Procurement Delegation: | 1  2  3  4  5 | |
| Additional Comments: | *insert details* | |
| Signature: | *insert details* | Date: *insert details* |