Appendix B1 – Complex Project Tender Evaluation Plan (TEP) template (Tender Selection Methods 2, 3 and 4)

Transport Infrastructure Project Delivery System

Volume 2 - Tendering for Infrastructure Works

August 2020

**Complex Project TEP Template (Tender Selection Methods 2, 3 and 4)**

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

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

1. Brief for TAP
   1. Project description

|  |
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| Use this section to provide the following information for the tendering team or other stakeholders:   * background information and documentation, if needed * single point of reference for issues, risks and opportunities * briefing document for personnel not previously involved in project.   Either type the information in this document, or provide specific references to where the information can be found. For example, Business Case, Section 1.2.  To delete this guidance text box, double click mouse in the left margin then press delete |

Type here

* + 1. Project location

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| Define project geographic location including specific cities, towns and/or streams by which the project site can be readily visualised; project length may also be included here (refer business case).  To delete this guidance text box, double click mouse in the left margin then press delete |

Type here

* + 1. Type of work

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| Describe the type of work, e.g. road construction on new alignment, pavement reconstruction and overlay, road widening, construction of traffic facilities – grade separation or at-grade, bridge construction or widening, etc. (refer Business Case).  To delete this guidance text box, double click mouse in the left margin then press delete |

Type here

* + 1. Scale and scope of work

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| Provide a clear description of the extent of the works and their scope, e.g. if pavement widening – whether existing pavement is to be altered in any way, whether continuous or in sections over a nominated length, number of carriage ways and/or traffic lanes, traffic environment (i.e. whether in urban or rural area, to be constructed under traffic or not), etc., (refer Business Case, planning and design documents).  To delete this guidance text box, double click mouse in the left margin then press delete |

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* 1. Project objectives

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| Concisely state what the project is expected to achieve. Include government and community benefits, reasons for undertaking the project, site specific issues and constraints (refer to any specific clauses, or reports in the business case that would aid understanding of the project objectives). Government and community benefits should be stated as explicitly as possible, for example: reduce travel time by 35 minutes, enable expansion of Joe's Quarry, allow shopping centre development in Tinsletown.  This information may be used by the TAP when assessing an innovative alternative tender that is difficult to compare with the original design, or may aid in developing project specific non-price selection criteria.  To delete this guidance text box, double click mouse in the left margin then press delete |

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* 1. Stakeholders

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| 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 |

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

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| 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. Construction timetable
     1. Programming intentions and objectives

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| Describe the intended period for communication and completion of the work. Include any nominated stages, known constraints and specific milestones. Constraints include linkages or connections to other projects which will limit or increase opportunities and risks, public statements of completion and expenditure limitations.  To delete this guidance text box, double click mouse in the left margin then press delete |

Type here

* + 1. Constraints

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| Describe any restrictions which will limit the way in which this project can be undertaken or might have an impact on its successful completion, e.g. risk factors, geographical or topographical issues, traffic conditions, social or urban factors (such as site access, adjacent property access, weather patterns, school holidays, linkages to adjacent projects, impacts of adjacent works (commercial construction, service relocations), and so on).  To delete this guidance text box, double click mouse in the left margin then press delete |

Type here

* + 1. Urgency

|  |
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| Identify the urgency of the project including contributing reasons and/or factors. |

Type here

* + 1. Target dates

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

|  |  |  |
| --- | --- | --- |
| Milestones | Target dates | Date achieved/notes |
| **Call tenders** | *insert details* | *insert details* |
| **Close tenders** | *insert details* | *insert details* |
| **Complete 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* |
| **Independent representative** | *insert details* | *insert details* | *insert details* |
| **Other** | *insert details* | *insert details* | *insert details* |
| **Probity Advisor** | *insert details* | *insert details* | *insert details* |

* 1. Convening of the panel

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| State here the intended timetable and arrangements for convening the panel, e.g. meet for each step in the selection process (from determination of the selection criteria to identification of the best tender), or meet only for tender assessment processes, or all members conduct the various considerations independently followed by informal (sequential) contact coordinated by the chairperson.  To delete this guidance text box, double click mouse in the left margin then press delete |

Type here

* 1. Additional resources

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| List here any known or intended requirements for resources to be engaged by the selection panel for provision of advice on aspects of tender evaluation, e.g. financial capability, specialised technical capability, referees etc. If warranted in consideration of alternative tenders, specialist advisors may need to be added to this list.  To delete this guidance text box, double click mouse in the left margin then press delete |

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| HOLD POINT  TAP appointed | | | |
| Signature: |  |  | / / |
|  | Principal |  | Date |

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

1. Documentation and communication

|  |
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| This section aids in the planning of the tender assessment process. Its aim is to aid in identifying risks to the project or the tendering process to enable effective management or minimisation. The completion of this section will also aid auditors in case of a review of the selection process is required.  To delete this guidance text box, double click mouse in the left margin then press delete |

* 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

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| 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 and press delete |

* 1. Tender selection criteria and weightings

|  |
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| This Section 3.2 is to be deleted if Tender Selection Method 1 has been selected at Section 3.1 above.  To delete this guidance text box, double click mouse in the left margin and press delete |

Type here

* + 1. Risk, opportunity and urgency

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| Describe the risk factors which must be managed in order to successfully complete the works, opportunity factors and urgency that should be considered. These will assist identification of selection criteria.  Note: Unless previously stated, constraints to timing, funding or other elements should be noted here so alternative tenders can be assessed against departmental requirements.  To delete this guidance text box, double click mouse in the left margin then press delete |

Type here

|  |  |  |
| --- | --- | --- |
| Risk/opportunity | Urgency | Description |
| *insert details* | *insert details* | *insert details* |
| *insert details* | *insert details* | *insert details* |

* + 1. Project specific and non-project specific factors

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| --- |
| If appropriate, describe relevant project specific factors and non-project specific factors (such as government priorities) that should be considered. These will assist identification of selection criteria.  To delete this guidance text box, double click mouse in the left margin then press delete |

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|  |  |
| --- | --- |
| Project specific and non-project specific factors | Description |
| *insert details* | *insert details* |
| *insert details* | *insert details* |
| *insert details* | *insert details* |

* + 1. Selection criteria

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| --- |
| Define selection criteria based on the information available in the above Sections 3.2.1 and 3.2.2 above. Sub‑elements which define the components of each criteria are also to be defined.  To delete this guidance text box, double click mouse in the left margin then press delete |

|  |  |
| --- | --- |
| Selection criteria | Sub-elements |
| *insert details* | *insert details* |
| *insert details* | *insert details* |
| *insert details* | *insert details* |

* + 1. Weighting of criteria

|  |
| --- |
| The relative weightings of the selection criteria defined at the above Section 3.2.3 need to be determined. These weightings should include those for sub‑elements.  The basis of each weighting, including the reasons for must also be recorded below.  To delete this guidance text box, double click mouse in the left margin then press delete |

Type here

|  |  |  |
| --- | --- | --- |
| Selection criteria | Weighting | Basis of weighting |
| *insert details* | *insert details* | *insert details* |
| *insert details* | *insert details* | *insert details* |
| *insert details* | *insert details* | *insert details* |

* + 1. Scoring matrix

|  |
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| The scoring matrix to be used by the selection panel must be defined at the same time as determining the criteria and their weightings. This matrix should not be included in the tender selection methodology to be published in the Conditions of Tendering.  The matrix adopted must be attached to this plan.  To delete this guidance text box, double click mouse in the left margin then press delete |

Type here details of the adopted matrix, including the reasons for its adoption.

* 1. Pre-close of tender meeting

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| 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 |

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* 1. Tender submission

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| Define here the additional documents that should be attached with tender documents such as templates to forward information for assessing non-price criteria.  To delete this guidance text box, double click mouse in the left margin then press delete |

Type here

* 1. Interview plan (if applicable)

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| Define here the arrangements intended for conduct of interviews, e.g.:   * whether or not tenderers are to make a presentation as part of the interviews * the appropriate representatives of tenderers who are eligible to participate (i.e. who and who not to be involved).   To delete this guidance text box, double click mouse in the left margin then press delete |

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

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

Procurement Delegate Endorsement

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| 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* |