

Schedule 5 – Request for Quotation Template

Note to Service Provider:

This Schedule 5 provides a Request for Quotation (RFQ) template that includes the typical information that an Agency will provide to the Service Provider to request a quotation for the provision of Management Advisory Service to an Agency, as detailed in clause 11.2 of the Head Agreement. It is intended that the RFQ will be provided as a smart form. The intent of this template and any smart form is to achieve a high level of standardisation and consistency in Agency RFQs to provide efficiencies to Agencies and Service Providers, however, it will not be mandatory that Agencies use this RFQ Template or any resulting smart form to request quotes from Service Providers.

1. Introduction

- 1.1. This RFQ is issued under clause 11.2 of the Head Agreement between the Service Provider and the Department of Finance.

<u>Request For Quotation for Services</u>	
<i>Agency Information</i>	
Agency	[Insert Agency name]
Agency File Reference	[Insert Agency file reference number]
RFQ Reference	[Insert Agency RFQ reference number]
Agency Representative	Name: [Insert contact name] Position: [Insert title] Address: [Insert address, including postcode] Email: [Insert email address] Contact number: [Insert contact number, including area code] Mobile: [Insert mobile number]
<i>RFQ and Proposed Order Details</i>	
RFQ Release Date	[insert date the RFQ is released]
RFQ Closing Date	[insert date and time the RFQ closes]
Proposed Order Commencement Date	[insert date the Services will commence]
Proposed Order Term and/or Completion Date	[insert the order term and/or completion date]
Options to extend	The Agency may extend the Contract for [insert time period] by providing written notice to the Service Provider prior to the Order Completion Date.

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Milestones	[Insert proposed milestones for the delivery of the Services]
Statement of Work	
Service Area	[Insert which Service Category within a Service Area the Services required relate to (Financial/Corporate/Commercial)]
Service Category	[Insert the relevant Service Category that the services relate to]
Service Sub-category	[Insert the relevant Service Subcategory that the services relate to]
Detailed Statement of Work	[Insert a detailed description of the Services required and any Associated Outputs, including relevant background material and whether any licences/authorisations are required to provide the services and any reporting that may be required. A separate Statement of Work may be referenced and attached]
Deliverables	[include details of any deliverables required under a resulting Contract]
Subcontractors	<p>[Select one of the following statements:</p> <p>The Service Provider may nominate subcontractors to provide some or all of the Services; or</p> <p>The Service Provider may not nominate subcontractors to provide some or all of the Services.]</p>
Location	[Insert the required work location/site, or insert 'Not Applicable']
Fees	[Insert details of fee structure e.g. hourly/daily rates, fixed fee]
Payment Terms	<p>[Select the relevant payment terms – note that invoicing is the default payment method for Non-corporate Commonwealth Entities (NCEs)</p> <p>[For Non-corporate Commonwealth entities: (a) five calendar days where the Agency and the Service Provider both have the capability to deliver and receive e Invoices through the Pan-European Public Procurement On-Line Framework and have agreed to use this method of invoicing; or (b) 20 calendar days]</p> <p>[For Agencies other than Non-corporate Commonwealth entities: [insert payment terms]]</p>
Travel	[Insert details of any travel that may be required and whether the Service Provider will be reimbursed for travel costs or if travel will be paid for by the Agency, or insert Not Applicable].
Agency Material	[List any documents attached to the RFQ]
Existing Material	[Insert details of any Existing Material or insert 'Not Applicable']
Contract Material	[Unless specified in the Statement of Work, insert details of any Contract Material]

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Confidential Information	<p>[Include details in table below or insert Not Applicable]</p> <table border="1" style="width: 100%; border-collapse: collapse; margin-top: 10px;"> <tr> <th style="width: 70%; text-align: center;">Agency Confidential information (for example)</th><th style="width: 30%; text-align: center;">Period of Confidentiality</th></tr> <tr> <td style="text-align: center;">Agency data</td><td></td></tr> <tr> <td style="text-align: center;">Any Personal Information held by the Agency</td><td></td></tr> <tr> <td style="text-align: center;">Security Classified Information</td><td></td></tr> </table>	Agency Confidential information (for example)	Period of Confidentiality	Agency data		Any Personal Information held by the Agency		Security Classified Information	
Agency Confidential information (for example)	Period of Confidentiality								
Agency data									
Any Personal Information held by the Agency									
Security Classified Information									
Key Personnel Requirements									
Required Qualifications and Experience	[Include details of mandatory/desired qualifications, expertise, capacity and capability of Key Personnel, and whether or not they must have a security clearance]								
Other Requirements for Key Personnel	[For example, proposed Personnel performing the Services may be required to sign a deed and acknowledgements relating to confidentiality, security, moral rights, intellectual property and other relevant matters as required by the Agency. Any Contract will be conditional on this occurring]								
Additional Requirements									
Agency Data Storage Requirements	[Insert any Agency specific data storage requirement, for example whether data can or cannot be stored offshore and if a data breach response plan will be required (see clause 23.2)]								
Agency Security Requirements	[State any additional security requirements to the requirements contained in the Head Agreement, or that apply to particular aspects of work, or insert 'Not Applicable'].								
Security Clearance Requirements	[Include requirements for security clearances or insert 'Not Applicable']								
Liability	[The default liability cap is set out in clause 19. Specify if an alternate liability cap should apply. State any amendments to the exclusions to the liability cap, or other liability positions required]								
Agency Insurance Requirements	<p>[Insert any additional requirements (if any) for relevant insurances where these differ from the insurance amounts in the Head Agreement e.g.</p> <ul style="list-style-type: none"> a) Professional indemnity insurance for an insured amount of [\$ insert amount] per occurrence and not less than [\$ insert amount] in the aggregate; b) Public liability insurance for an insured amount of [\$ insert amount] per occurrence and not less than [\$ insert amount] in aggregate; and c) Workers compensation insurance as required by law; or <p>insert 'Not Applicable'. Where 'Not Applicable' is specified, the insurance requirements under the Head Agreement will apply]</p>								
Agency Service Levels	[Insert any proposed service level that apply to the delivery of the Services]								

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Conditions/Restrictions for Personal Information	[State any additional conditions/restrictions for Personal Information contained in the Head Agreement, or that apply to particular aspects of work or insert 'Not Applicable']
Other Additional Requirements	[Include any other additional requirements, if applicable]
Commonwealth Policy Requirements	
Shadow Economy Policy	[For procurements valued at \$4 million or more the Shadow Economy Policy applies. Agencies must obtain a Valid and Satisfactory Statement of Tax Record for any Partner that will be involved in the delivery of the Services]
Indigenous Procurement Policy	[For procurements valued at \$7.5 million or more, insert that clause 16.4.4 of the Head Agreement applies]
Australian Industry Participation Plan	[For procurement valued at \$20 million or more, the Australian Industry Participation policy may apply]
Evaluation Criteria	
<p>Responses to this RFQ will be evaluated against the following criteria: [Agencies should be able to select the evaluation criteria they wish to apply and/or include their own criteria].</p> <ul style="list-style-type: none"> • The Service Provider's demonstrated understanding of the Services required, including the identification of any key challenges and the management of risk. • The Service Provider's demonstrated capability and capacity to provide the services described in the Detailed Statement of Work to a very high standard and within the specified timeframes. • The Service Provider's demonstrated organisational experience in providing the similar services to the services described in the Detailed Statement of Work. • The relevant experience of nominated Key Personnel in providing the similar services to the services described in the Detailed Statement of Work [include any relevant qualifications, certifications, etc. required]. • The professional and other standards that your organisation would apply to the Services and the measures your organisation proposes to ensure that standards are maintained for the term of the Contract. <p>The extent to which the level and structure of fees proposed provides value for money for the Australian Government.</p>	
Responding to this RFQ	
<p>[Agencies will select from the requirements below and/or include their own requirements]</p> <p>The Service Provider is required to complete the following information:</p> <p>[Service Provider's Representative]</p> <p>[Service Provider's Name]</p> <p>[Service Provider's Address]</p> <p>[Service Provider's ABN]</p> <p>[Service Provider's email address]</p> <p>In responding to this RFQ, the Service Provider should:</p>	

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- describe its understanding of the Services required, including the identification of any key challenges and the management of risk
- detail its capability and capacity to provide the services described in the Detailed Statement of Work to a very high standard and within the specified timeframes
- detail its organisational experience in providing the similar services to the services described in the Detailed Statement of Work
- detail the relevant experience of nominated Key Personnel in providing the similar services to the services described in the Detailed Statement of Work including any qualifications, certifications, affiliations that the nominated Key Personnel have
- describe the professional and other standards that your organisation would apply to the Services and the measures your organisation proposes to ensure that standards are maintained for the term of the Contract.

The Service Provider is also required to:

- identify any subcontractors nominated to provide the services and their role in the delivery of the services
- disclose any conflicts of interest it would have with the delivery of the Services
- include any information in its response that it requests to remain confidential.

Service Provider Confidential information	Period of Confidentiality