Released by the Department of Finance
under the Freedom of Information Act 1982

Australian Government

Department of Finance

ATM – FIN/MASR2-RFT

ADDENDUM NUMBER 3

Management Advisory Services for the Australian Government

Refresh Phase 2 – Corporate and Commercial Management Advisory Services and Investment Banking Services

Date of Issue for this Addendum: 10 April 2025

This Addendum is issued in accordance with paragraphs 5.2 and 6.2 of the Request for Tender

Industry Briefing

A recording of the Industry Briefing and Building Your Best Tender Response Workshop, both held on Wednesday 9 April 2025, can be found at Attachment A to this Addendum 3.

Question 1	
Question	Is it possible for a Respondent to include experience from their broader corporate group (i.e. from other entities under their parent company)?
Answer	As detailed in the Evaluation Criteria in **section 11.4.2 of the RFT**, Respondents will be assessed against: (a) "the extent to which the Respondent demonstrates its capability and capacity to provide the Offered Services to the Australian Government; and (b) the extent to which the Respondent demonstrates its organisational experience, or where organisational experience cannot be provided, its personnel's experience, within the last 5 years providing the Offered Services to the Australian Government, other governments and/or large corporate organisations…" For clarity, the "Respondent" is defined in **Attachment A – Definitions** as "any organisation that may respond or has responded to this RFT as the context requires". Therefore, examples from a different entity with the intent of demonstrating organisational experience, would not be considered to demonstrate organisational experience of the Respondent.

Released by the Department of Finance
under the Freedom of Information Act 1982

Question 2	
Question	Could you please provide guidance on what types of engagements the Department would like respondents to prioritise when demonstrating experience? The range of type of experience that would fit under the Service Subcategories are very broad and could encompass a broad range of engagements.
Answer	Service Descriptors as contained in **Attachment B – Scope of Services** have been drafted in a deliberately broad manner. This is to ensure that Commonwealth Entities have access to the widest possible range of capable and cost-effective advisory service providers through the panel arrangement. It is up to Respondents to determine how to best demonstrate their experience that aligns with the relevant Service Subcategory.

Question 3	
Question	Question 2 asks "How many full-time equivalent (FTE) personnel (not including subcontractors) are in your organisation with the relevant skills and experience to provide advisory services in the XXX Service Subcategory?". This could be a very large number of FTE. Question 3 then asks for qualifications of these personnel. Is the intention of Question 3 meant to be a general overview of qualifications, or an overview for specific personnel, noting this might be a significant number of FTE and Question 3 has a 500-word limit?
Answer	It is up to Respondents how to best detail relevant qualifications of their personnel within the word limit, subject to the number of relevant FTE a Respondent has for any given Service Subcategory. For example, a Respondent with a large number of FTE may choose to provide a more general response that captures common tertiary or industry-recognised qualifications held by its personnel for a relevant Service Subcategory.

Question 4	
Question	We noticed that Sections 10 to 31 appear to be missing from the 360 Public Portal Questionnaire. Could you confirm whether these sections are not required for this refresh?
Answer	Sections 10-31 of the Questionnaire in the 360 Public Portal encompass Service Subcategory specific questions. To make Sections 10-31 available for answering, a Respondent must complete Section 9 "Offered Services". The relevant Sections will then become available, based on the Service Subcategories a Respondent is offering services for.

Released by the Department of Finance
under the Freedom of Information Act 1982

Question 5	
Question	Can we put forward examples of both consultancy and non-consultancy services as our examples of work?
Answer	The Management Advisory Services (MAS) Panel is for commonly used Management Advisory Services, which are defined as the provision of professional, independent advice, and other strategic services that involve the development of an intellectual output which represents the independent view of the Service Provider and assists with entity decision-making, and must meet the consultancy characteristics as defined in Resource Management Guide No 423: Procurement Publishing and Reporting Obligations. More information on what services are in-scope and out-of-scope of the MAS Panel can be found in sections **1.2 and 1.3 of the RFT**.

Question 6	
Question	In each Service Subcategory there is a requirement to include at least one personnel, corresponding with the Personnel Classifications and Expected Work Level Standards, and there is also opportunity to nominate Expert Personnel. How should a sole trader who is expert level manage this?
Answer	Expert Personnel are Key Personnel that with regards to their experience and recognition are higher than 'Level 6', and any personnel nominated for Personnel Classification level 1-6, would not be considered as Expert Personnel. Finance considers that sole traders that are 'expert level' would fit into the definition of a Level 6, which carries the following work level standard: • A Level 6 classification is fully responsible for the Service Provider's delivery of all aspects of the Ordered Services. • A Level 6 is fully accountable for actions taken and decisions made, both by themselves and other Service Provider Personnel assigned work in connection with the Ordered Services. • A Level 6 will have a broad and deep knowledge of the Service Category under which the Services relate. • It is expected that a Level 6 would hold, as a minimum, undergraduate and post graduate degrees relevant to the area(s) of specialisation or similarly regarded qualification or have extensive relevant experience. A Level 6 may hold professional body senior membership, and professional body certifications. Therefore, a sole trader who is 'expert level', should nominate themselves as a level 6, and indicate that they have no Expert Personnel.

Question 7	
Question	Can Finance clarify what referees will be asked to complete their Referee Endorsement, and the expected timeframe that referees will be given?
Answer	Referees will be asked to verify the Respondents claims in response to the 360 Public Portal Questionnaire. Answers that will be provided to referees are flagged in the "Instructions/Notes" section of each relevant question. As stated in the 360 Public Portal, referees will be able to complete their responses in the 2 weeks following the Closing Time, between 4 – 18 June 2025.

-- End of Addendum --

Released by the Department of Finance
under the Freedom of Information Act 1982

FOI 26-27/094 - Document 11

Australian Government
Department of Finance

INDUSTRY BRIEFING

MAS Panel Refresh 2 –

Corporate and Commercial Management Advisory Services and Investment Banking

Request for Tender FIN/MASR2-RFT

RFT published 26 March 2025

Released by the Department of Finance
under the Freedom of Information Act 1982

FOI 26-27/094 - Document 11

ACKNOWLEDGEMENT OF COUNTRY

I would like to acknowledge the traditional owners and custodians of the land in which we live and work. I extend that acknowledgement to their continuing connection to country, water and community. I pay my respects to elders past and present and extend that respect to all Aboriginal and Torres Strait Islander peoples.



Released by the Department of Finance
under the Freedom of Information Act 1982

FOI 26-27/094 - Document 11

Australian Government
Department of Finance

s22

Director, Strategic Procurement Branch
Department of Finance

Released by the Department of Finance
under the Freedom of Information Act 1982

PURPOSE OF THIS BRIEFING

- Overview of the process to refresh the Management Advisory Services Panel
- Understanding of the tender documentation
- Information about how to complete and submit a tender
- Finance will run a “Building your Best Tender Response” workshop following this briefing

Released by the Department of Finance
under the Freedom of Information Act 1982

QUESTIONS AND ANSWERS – PROCESS

- If you would like to ask a question in relation to this RFT, please contact the Request Manager at MASRefresh@finance.gov.au, or through the 360 Public Portal.
- Following the Industry Briefing, Finance will issue an Addendum through AusTender and the 360 Public Portal to Respondents.
- The Addendum will provide Respondents with a recording of the Industry Briefing and Workshop.
- Tenderers should not discuss the RFT with, or seek information regarding the RFT from, their business-as-usual Finance contacts.

Released by the Department of Finance
under the Freedom of Information Act 1982

COMMONWEALTH PROCUREMENT RULES

- Non-discriminatory procurement process
- Accountable and transparent
- Value for money – not solely about price
- Open and competitive process
- Coordinated Procurements
  - Mandatory for NCCEs
  - Opt in for CCEs and GBEs
  - Deliver cost reductions and efficiencies and improved quality of goods and services

Released by the Department of Finance
under the Freedom of Information Act 1982

PROBITY REMINDER



Do not offer gifts or hospitality during the procurement process



Declare any conflicts of interest



Do not try to elicit any information about the RFT or procurement process except from the Request Manager



All questions should be sent to the Request Manager specified in the RFT



Do not engage in improper conduct, including collusion with other tenderers



Be mindful of your confidentiality obligations around participation in the RFT process (paragraph 9.19 -9.21 and Respondent's Declaration)

Released by the Department of Finance
under the Freedom of Information Act 1982

ETHICAL CONDUCT

- The Commonwealth expects its suppliers to conduct themselves with high standards of ethics such that they consistently act with integrity and accountability.
- The Commonwealth Supplier Code of Conduct must be adhered to by all Successful Respondents.
- Finance may exclude from consideration any Respondent which, in Finance's reasonable opinion, has engaged in any unethical or improper behaviour, or any behaviour that is contrary to any law.

Released by the Department of Finance
under the Freedom of Information Act 1982

BACKGROUND

- The MAS Panel was established in a phased approach with the final phase commencing services in October 2022.
- The MAS Panel structure allows it to be refreshed during its term to allow new Service Providers to join and existing Service Providers to qualify for additional Service Subcategories that may be added over time.
- The refresh (Refresh 1) for Financial Management Advisory Services was completed in 2024.
- This refresh (Refresh 2) is for Corporate and Commercial Management Advisory Services and Investment Banking Services
- Approaches from industry to join the Panel will not be considered outside of a formal refresh process.
- The MAS Panel is for commonly-used consultancy services, it **does not** include contractor or labour-hire services.

Released by the Department of Finance
under the Freedom of Information Act 1982

CONSULTATION OVERVIEW

PHASE	ACTIVITY	UNDERTAKEN
Entity Consultation	Survey	August 2023
Industry Consultation 1	Consultation Paper	July 2023
Industry Consultation 2	Survey	December 2024

Released by the Department of Finance
under the Freedom of Information Act 1982

FOI 26-27/094 - Document 11

ENTITY CONSULTATION 1 FINDINGS

Responses were received from approximately 30 entities with the common themes being:

- Inclusion of the Investment Banking Services Service Subcategory
- All Service Subcategories should be refreshed
- Panel users were satisfied with the process and coverage that the MAS Panel provides
- Panel users were satisfied with the quality of work delivered under the MAS Panel

Released by the Department of Finance
under the Freedom of Information Act 1982

INDUSTRY CONSULTATION FINDINGS

Responses were received from 68 interested parties in the initial industry consultation, and 63 in the second industry consultation with the common themes being:

- Some further service descriptor examples recommended for some subcategories such as:
  - Ethics and integrity frameworks
  - Mediation and conflict management
  - Health and safety policy analysis and advice
  - Contract management
  - Predictive modelling and scenario planning
- Consideration for work examples from a wider period of time
- More consideration of the quality of personnel and experience, not just the organisation experience
- Criticism of the granularity of detail in the Service Subcategories, and overlap of themes with other panels

Released by the Department of Finance
under the Freedom of Information Act 1982

PROCUREMENT TIMELINE

MILESTONE	INDICATIVE DATE
Enquiry Cut-off	5:00 pm (Canberra local time) Tuesday 20 May 2025
Last Addenda Release Date	5:00 pm (Canberra local time) Tuesday 27 May 2025
Tender Close	**2:00 pm (Canberra local time)** **Tuesday 3 June 2025**
Expected Commencement Date	March 2026

Released by the Department of Finance
under the Freedom of Information Act 1982

REQUEST FOR TENDER OVERVIEW

- The Request for Tender establishes the Conditions of Tender and describes the Evaluation Process.
- The Request for Tender includes the following attachments:

  (a) Attachment A* – **Definitions**;
  (b) Attachment B – **Scope of Services**;
  (c) Attachment C – **Head Agreement**;
  (d) Attachment D* – **Head Agreement Amendments**;
  (e) Attachment E – **360 Public Portal Respondent's User Guide**;
  (f) Attachment F – **Guidance for MAS Panel Tender Responses**.
  (g) Attachment G* – **Sustainable Procurement and Economic Benefits to the Australian Economy**;
  (h) Attachment H – **Guidance on the Shadow Economy Procurement Connected Policy**;
  (i) Attachment I – **Modern Slavery**; and,
  (j) Attachment J – **Respondent's Declaration Information.**

*__Please note__: Attachments **A** (Definitions), **D** (Head Agreement Amendments) and **G** (Sustainable Procurement and Economic Benefits to the Australian Economy) are included in the RFT document.

Released by the Department of Finance
under the Freedom of Information Act 1982

FOI 26-27/094 - Document 11

CONDITIONS FOR PARTICIPATION



- See Part C – Conditions of Tender – Clause 8.1 on page 17 of the RFT.
- Respondents that do not meet the Conditions for Participation will be excluded from evaluation.
- The Respondent must:
  - be a legal entity;
  - not be bankrupt or insolvent;
  - not be subject to any judicial decision against them (not including decisions under appeal) relating to employee entitlements and who have not satisfied any resulting order; and
  - not be listed as a non-compliant employer under the *Workplace Gender Equality Act 2012* (Cth).

Released by the Department of Finance
under the Freedom of Information Act 1982

FOI 26-27/094 - Document 11

MINIMUM CONTENT AND FORMAT REQUIREMENTS



The Minimum Content and Format Requirements that apply to this RFT are:

a) The Tender must be written in English; and

b) all fees must be submitted in the form of hourly rates and in Australian dollars.

Released by the Department of Finance
under the Freedom of Information Act 1982

FOI 26-27/094 - Document 11

SHADOW ECONOMY POLICY



- Refer to Attachment H of the RFT – Guidance on the Shadow Economy Procurement Connected Policy.
- Submit the correct Statement of Tax Records (STR)s for the Respondent's organisational structure.
- Non-compliance with this requirement may exclude your tender during the evaluation process.
- Submit your request for the STR through the ATO Portal as early as possible.
- If you request your STR over the phone, you may not receive the STR in time.
- Finance cannot accept audited accounts, recent annual reports, or activity statements in lieu of an STR.

Released by the Department of Finance
under the Freedom of Information Act 1982

SHADOW ECONOMY POLICY Cont.



- The Australian Taxation Office (ATO) has confirmed that every organisation is required to provide an STR. This includes (but is not limited to):
  - Companies (including overseas companies)
  - Sole traders
  - Not-for-Profits and educational not-for-profits
  - Partnerships
  - Trusts
  - Joint ventures/ Consolidated groups



Australian Government
Australian Taxation Office

<TITLE> <FIRST NAME> <LAST NAME>
<ADDRESS LINE 1>
<ADDRESS LINE 2>

Our Reference:
ABN: <ABN>
Date of issue: <DD Month CCYY>
Date of expiry: <DD Month CCYY>

Statement of tax record – Satisfactory

› <Entity Name> has met the criteria for a satisfactory tax record

› This statement may be required for your tender. Check your tender request documentation.

This statement of tax record is issued to <Entity Name> to confirm that this entity has met the criteria of having a satisfactory engagement with the Australian tax system, as detailed in the Procurement Connected Policy - *Black economy - increasing the integrity of government procurement.*

For further information on how the criteria are applied to determine the outcome of a statement of tax record see **ato.gov.au/STR**

Yours faithfully,
Tim Dyce
Deputy Commissioner of Taxation

SAMPLE

Released by the Department of Finance
under the Freedom of Information Act 1982

COMMON STR ISSUES



- Leaving it to the last minute.
- Not providing an STR for the Tendering Organisation.
- Relying on internal or external advice regarding STR requirements without seeking confirmation from the ATO.
- Submitting the wrong documentation.
- Not responding to correspondence from Finance about your STR.

Released by the Department of Finance
under the Freedom of Information Act 1982

FOI 26-27/094 - Document 11

ATTACHMENT B – SCOPE OF SERVICES

Corporate Management Advisory Services

Organisational Planning and Development

Business strategy and improvement

- Processes, systems and mapping
- Design, reengineering, risk and controls
- Strategic analysis and plans
- Organisational design, objectives, resourcing and delivery strategies
- Benchmarking and intelligence
- Capability and service delivery reform

Change Management

- Strategies and best practices
- Impact assessments and change resistance
- Communication strategies and stakeholder engagement
- Workforce culture and change

Business performance reviews

- Performance measures and strategies
- Measurement and reporting of efficiency and effectiveness
- Quantitative and qualitative analysis

Business continuity

- Identifying critical business operations
- Emergency management
- Disaster recovery strategies and plans
- Disaster recovery testing
- Evaluation and performance monitoring

Human Resources

Capability and performance

- Framework design, development and analysis
- Human resource strategy
- Workforce planning
- Performance analysis and systems
- Diversity, equity and inclusion programs and strategies

Workforce management

- Employment legislation and relations
- Job classification reviews, remuneration and succession planning
- Structure analysis
- Health and safety policy analysis and advice
- Human resource policy advice, development and review
- Analysis of administrative policies and processes
- Mediation and conflict management

Corporate Governance

Governance structures and performance

- Board, committee and CEO performance evaluations
- Procedure and process reviews
- Strategic directions and objectives analysis
- Corporate governance best practice standards
- Policy and procedure compliance reviews
- Skills mix analysis

Compliance, fraud and integrity

- Investigations and reviews
- Control programs, strategies and plans
- Ethics and compliance
- Processes and mapping
- Human resource investigations
- Ethics and integrity frameworks

Internal Audit

Audit and assurance

- Prepare and review of audit policies and plans
- Undertake internal audits in accordance with professional auditing standards
- Assurance reviews

Released by the Department of Finance
under the Freedom of Information Act 1982

FOI 26-27/094 - Document 11

ATTACHMENT B – SCOPE OF SERVICES

Commercial Management Advisory Services

Government Policy

Policy development and analysis

- Design, modelling and formulation
- Stakeholder engagement
- Review and analysis
- Define policy problem
- Identify policy instruments
- Implementation requirements
- Monitoring and reporting
- Design and review of guides, frameworks and procedures

Legislation (non-legal)

- Design, modelling and development
- Review and analysis
- Stakeholder engagement
- Allocation of functions and responsibilities
- Regulatory compliance frameworks
- Regulatory impact statements and analysis
- Machinery of government changes

Privacy advice and assurance (non-legal)

- *Privacy Act 1988* (Cth) compliance strategies
- Privacy impact assessments
- Compliance assessments
- Public assurance statement advice
- Data security assurance
- Privacy and data protection health checks

Programs and Projects

Program/Project development and design

- Contestability reviews
- Business cases (including scoping studies)
- Define scope and objectives
- Cost modelling and analysis
- Resource analysis and strategies
- Design and mapping
- Evaluation strategies and methodologies
- Stakeholder engagement
- Current and future state analysis
- Business process mapping/analysis
- Governance

Program/Project management

- Performance and quality management
- Benefits management and monitoring
- Stakeholder engagement
- Implementation, reviews and assurance
- Management frameworks and guidelines

Program/Project evaluation

- Review and analysis
- Stakeholder engagement
- Monitoring frameworks and strategies
- Benefits realisation
- Compliance and assurance
- Lessons learned

Procurement and Probity

Strategic procurement advice

- Analysis of markets and supply chains
- Procurement strategies, methodologies, planning and management
- Stakeholder engagement
- Cost modelling and analysis
- Advice on debriefing and complaints management
- Procurement process review
- Contract documentation (non-legal) service levels and key performance indicators
- Negotiation planning and offer definition planning
- Contract payment mechanisms and performance frameworks
- Procurement evaluation frameworks and reports
- Strategic asset management
- Contract management

Probity Advisory Services (non-legal)

- Probity briefings and documentation
- Review and advice on procurement documentation
- Evaluation and negotiation advice
- Policy compliance and assurance
- Review and analysis to minimise and manage probity risks
- Assessment of probity related matters
- Conflict of interest and risk management strategies

Probity Auditing Services (non-legal)

- Audit of compliance with procurement policies and processes
- Assessment of probity issue management

Risk

Strategic Risk Management

- Risk program design and systems
- Risk identification and management strategies
- Independent review and assurance
- Risk monitoring and reporting
- Strategies for continuous improvement
- Social risk analysis and mitigation
- Scenario planning and stress testing
- Fostering cross-Government risk collaboration (shared risk)
- Monitoring emerging risks and adaptation strategies
- Risk appetite assessment
- Opportunity identification and management
- Implementing effective risk control frameworks
- Building risk capability

Research*

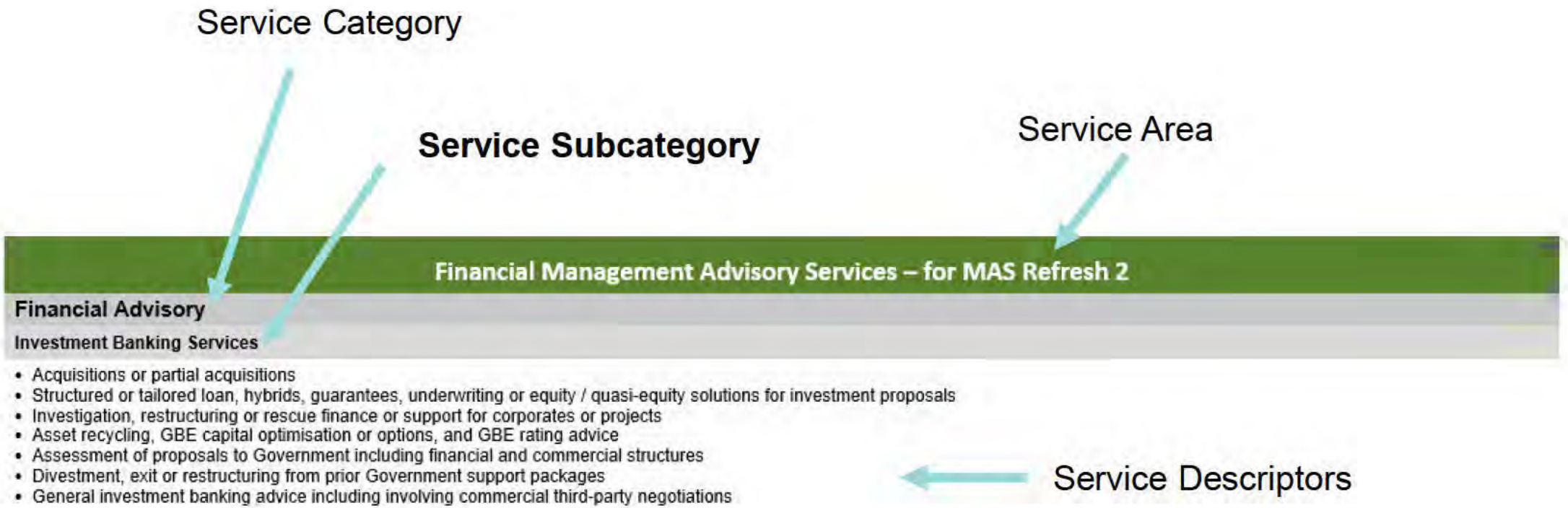
Research and data collection

- Research strategies, research and reviews
- Data collection and management strategies
- Data synthesis, analysis and review
- User experience research
- Focus group testing and modelling
- Survey strategies, design, analysis and review
- Stakeholder engagement
- Compliance with relevant standards and guidelines
- Quality assurance and peer review strategies
- Predictive modelling and scenario planning

*excludes research for campaign advertising

Released by the Department of Finance
under the Freedom of Information Act 1982

ATTACHMENT B – SCOPE OF SERVICES



Released by the Department of Finance
under the Freedom of Information Act 1982

FOI 26-27/094 - Document 11

WHO CAN TENDER?

Scenario	Application to this RFT
An existing Service Provider on the MAS Panel and is not seeking to provide services into other Service Subcategories (in addition to the Subcategories already in their Head Agreement).	The existing Service Provider should **not** submit a tender response. As a refresh activity, existing Service Providers are **not** required to retender for Services already contained in their Head Agreement.
An existing Service Provider on the MAS Panel and is either: seeking to provide additional services into other Service Subcategories; and/or was unsuccessful in a previous MAS tender for additional services in other Service Subcategories.	The potential Respondent **should** submit a tender response.
A potential respondent not currently on the MAS Panel and would like to provide services under any/all of the 21 Service Subcategories.	The potential Respondent **should** submit a tender response.
The potential Respondent only proposes to provide services under Financial Management Advisory Services other than the Investment Banking Subcategory.	Apart from the new Investment Banking Subcategory, this RFT does not relate to Financial Management Advisory Services. The potential Respondent is **not** required to respond to this RFT but may be able to respond to future MAS tender opportunities for Financial Management Advisory Services.

Released by the Department of Finance
under the Freedom of Information Act 1982

TENDER SYSTEM

- The 360 Public Portal utilised by Finance is a digital tendering platform
- Tenders must be submitted in the 360 Public Portal before the Closing Time
- 360 Quick Reference Guide
- 360 Tender System Respondent's User Guide is available at Attachment F of the RFT
- Referee Endorsements

Released by the Department of Finance
under the Freedom of Information Act 1982

FOI 26-27/094 - Document 11



RESPONDING TO THE QUESTIONNAIRE

- Provide information about the skills and qualifications of personnel, relevant to the service subcategory.
- Specific examples that show who the clients were, when the services were provided and how these relate to the service subcategory.
- Address all elements of each question.
- Examples should clearly demonstrate the advisory services you have provided.
- Avoid vague claims, like ‘many engagements’ or ‘for a number of years.’
- Avoid cutting and pasting generic information for each Service Subcategory or providing marketing statements.

Released by the Department of Finance
under the Freedom of Information Act 1982

TENDER SYSTEM – REFEREES

- Finance is using the 360 Public Portal to facilitate Referee Endorsements.
- Respondents are required to provide one referee for each demonstrated advisory service example.
- Referees will have up to the date notified in the referee request email to submit their reference via the 360 Tender System.

Released by the Department of Finance
under the Freedom of Information Act 1982

REFEREES

- Ensure your referees are aware they will be nominated and that they are happy to provide a reference.
- The referees should be related to the examples provided.
- Avoid using the same referee for both examples.
- Respondents will be notified via email when each referee has started their response and again when they have completed their response.
- The 360 Public Portal will provide referees with reminders to submit their reference.

Released by the Department of Finance
under the Freedom of Information Act 1982

TENDER RESPONSE TIPS

- **Reminder**: Finance will run a “Building your Best Tender Response” workshop following this briefing
- Be careful if cutting and pasting information from previous responses to similar tenders
- Utilise the word limits provided in the 360 Public Portal
- Read your responses before submitting
- Consider having someone outside the process QA your response
- Be consistent with the use of your business or legal name
- Submit your best offer
- Review the answers to questions provided in Addenda

Released by the Department of Finance
under the Freedom of Information Act 1982

FOI 26-27/094 - Document 11

COMMON MISTAKES

- Examples are more aligned to contractor services rather than consultancy services
- The examples provided did not relate to the Service Subcategory or the Service Area
- The examples provided are for out-of-scope services
- The same examples are provided for multiple Service Subcategories – focus on what you do best
- Referee contact details are incorrect

Released by the Department of Finance
under the Freedom of Information Act 1982

STATEMENT OF TAX RECORD



Released by the Department of Finance
under the Freedom of Information Act 1982

ENQUIRIES

360 Tender System Support



support@simplylogical.net



(02) 5100 4009

Finance Request Manager



MASRefresh@finance.gov.au

Reminder

Enquiry Cut-off: 5:00 pm (Canberra local time) Tuesday 20 May 2025

Tender Closing Time: 2:00 pm (Canberra local time) Tuesday 3 June 2025

Released by the Department of Finance
under the Freedom of Information Act 1982



Submit any questions to the Request Manager email
MASRefresh@finance.gov.au

Released by the Department of Finance
under the Freedom of Information Act 1982

FOI 26-27/094 - Document 11

UP NEXT – WORKSHOP

- **Building Your Best Tender Response**

  Presented by the Procurement Capability Branch



Released by the Department of Finance
under the Freedom of Information Act 1982

FOI 26-27/094 - Document 11

Australian Government
Department of Finance | Selling to Government

Building Your Best Tender Response

Released by the Department of Finance
under the Freedom of Information Act 1982

FOI 26-27/094 - Document 11

Session overview

- Elements of an Approach to Market
- Preparing and responding to an Approach to Market
- Considerations before lodging a response
- Tender writing tips and good practice
- Common pitfalls

38

Released by the Department of Finance
under the Freedom of Information Act 1982

FOI 26-27/094 - Document 11

Australian Government
Department of Finance

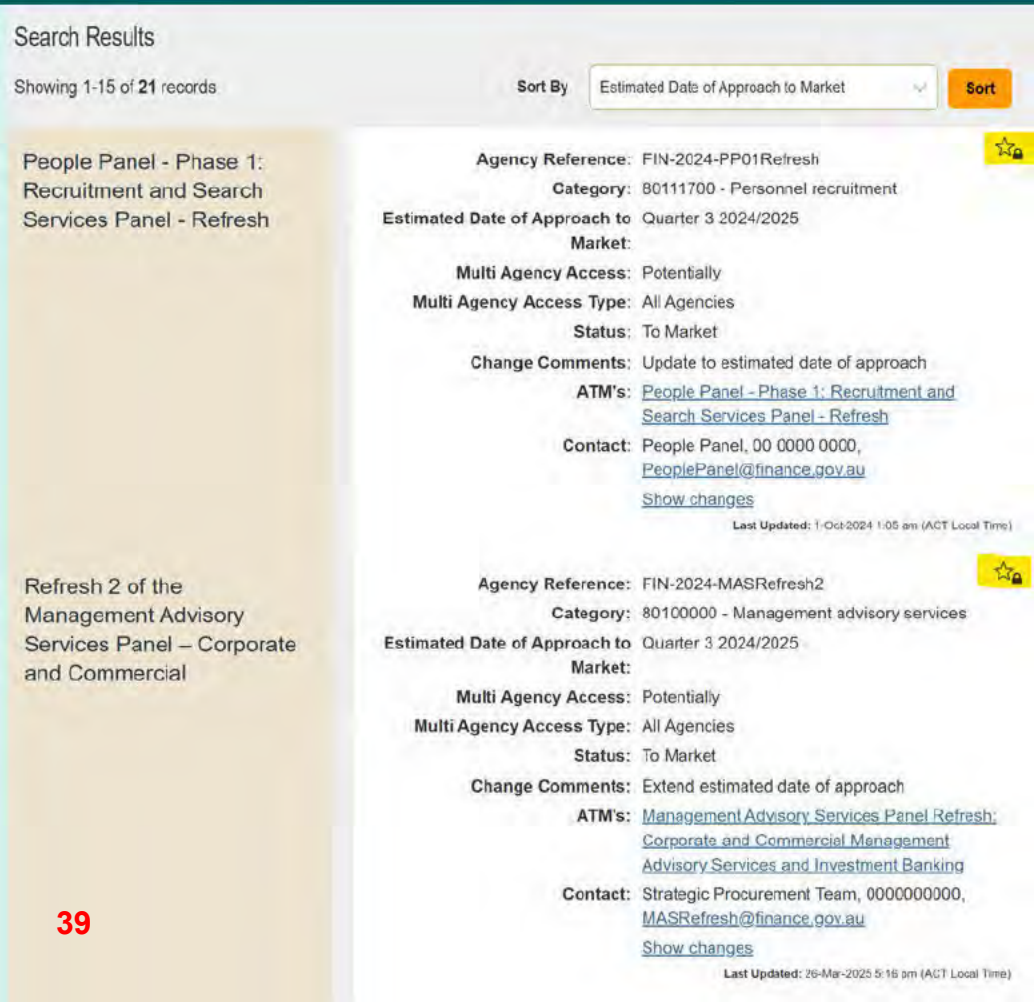
Service to Government

Where to find Procurement Opportunities

AusTender

The Australian Government publishes **WoAG procurement opportunities** and **notices** of standing offers and successful contracts, valued at or above $10,000, on AusTender.

- Register for free
- Receive information about new procurement opportunities
- Review annual procurement plans
- Watch planned procurements
- Look for refresh opportunities



Search Results

Showing 1-15 of **21** records

Sort By: Estimated Date of Approach to Market — Sort

People Panel - Phase 1: Recruitment and Search Services Panel - Refresh

Agency Reference: FIN-2024-PP01Refresh
Category: 80111700 - Personnel recruitment
Estimated Date of Approach to Market: Quarter 3 2024/2025
Multi Agency Access: Potentially
Multi Agency Access Type: All Agencies
Status: To Market
Change Comments: Update to estimated date of approach
ATM's: People Panel - Phase 1: Recruitment and Search Services Panel - Refresh
Contact: People Panel, 00 0000 0000, PeoplePanel@finance.gov.au
Show changes
Last Updated: 1-Oct-2024 1:05 am (ACT Local Time)

Refresh 2 of the Management Advisory Services Panel – Corporate and Commercial

Agency Reference: FIN-2024-MASRefresh2
Category: 80100000 - Management advisory services
Estimated Date of Approach to Market: Quarter 3 2024/2025
Multi Agency Access: Potentially
Multi Agency Access Type: All Agencies
Status: To Market
Change Comments: Extend estimated date of approach
ATM's: Management Advisory Services Panel Refresh: Corporate and Commercial Management Advisory Services and Investment Banking
Contact: Strategic Procurement Team, 0000000000, MASRefresh@finance.gov.au
Show changes
Last Updated: 26-Mar-2025 5:16 pm (ACT Local Time)

Released by the Department of Finance
under the Freedom of Information Act 1982

FOI 26-27/094 - Document 11

Elements of an ATM

Elements usually found in an ATM:

- Statement of requirements
- Conditions for participation
- Evaluation criteria
- Minimum content and format requirements
- ATM Terms
- Draft contract



Approach to Market (ATM) – Goods and Services

Australian Government

Approach to Market

To establish Contract for << insert title of proposed contract here >>

Reference ID: << insert entity reference here >>

UNSPSC: << insert UNSPSC number here >> << insert UNSPSC title here >>

This Approach to Market (ATM) is for the provision of: << insert brief description of procurement here >>

The Commonwealth of Australia as represented by << insert entity legal name here >> (the Customer) is seeking submissions for the provision of the goods and services (the Requirement) as described in this ATM comprising:

- this CCS ATM, including the Statement of Requirement
- the CCS ATM Response Form
- the CCS ATM Annexes (if any)
- the Commonwealth ATM Terms
- the Additional Contract Terms (if any)
- the Commonwealth Contract Terms
- the Commonwealth Contracting Suite Glossary and Interpretation.

In submitting a response, Potential Suppliers are required to comply with all requirements set out in the Commonwealth Approach to Market Terms (a copy of which is included in this document), and if successful, agree to enter into a contract which incorporates the Commonwealth Contract Terms available at https://www.finance.gov.au/government/procurement/commonwealth-contracting-suite-ccs#ccs-terms.

Reference Number: << insert entity reference here >>

Page 2 of 34

Released by the Department of Finance
under the Freedom of Information Act 1982

FOI 26-27/094 - Document 11

Preparation



Ensure you are sufficiently prepared and understand the process, and common requirements.

To prepare for procurement opportunities that you may interested in, familiarise yourself with AusTender and review:

- typical packs of ATM documentation
- the Commonwealth Contracting Suite website

Released by the Department of Finance
under the Freedom of Information Act 1982

Australian Government
Department of Finance | Selling to Government

FOI 26-27/094 - Document 11

Before you respond to an ATM



Satisfy yourself the opportunity will be rewarding and cost-effective to pursue.

- Is this the right **opportunity**?
- Can you attend **briefings** if offered?
- Do you understand all the **requirements**?
- Can you **deliver** the required goods or services?
- Are you able to **lodge** the submission (digital)?
- Can you meet the submission **deadline**?
- Do you have required **licences**, **documentation**, **evidence of compliance**, etc.?

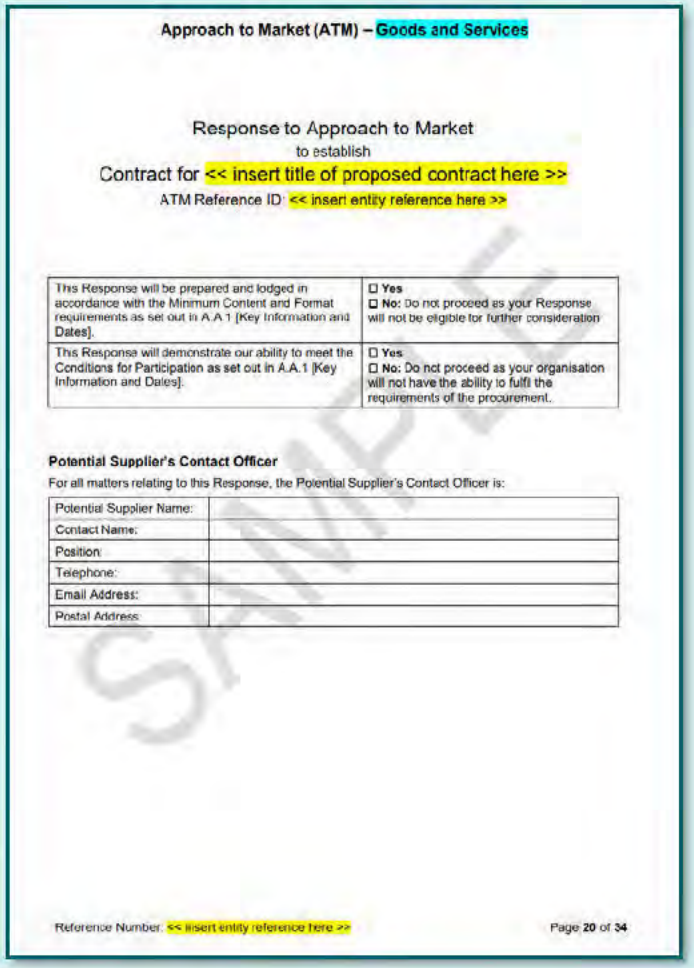
Released by the Department of Finance
under the Freedom of Information Act 1982

FOI 26-27/094 - Document 11

Review the ATM

Review the ATM carefully.

If you do not meet the minimum requirements your response will not be considered.



Approach to Market (ATM) – Goods and Services

Response to Approach to Market
to establish
Contract for << insert title of proposed contract here >>
ATM Reference ID: << insert entity reference here >>

This Response will be prepared and lodged in accordance with the Minimum Content and Format requirements as set out in A.A.1 [Key Information and Dates].	☐ **Yes** ☐ **No:** Do not proceed as your Response will not be eligible for further consideration
This Response will demonstrate our ability to meet the Conditions for Participation as set out in A.A.1 [Key Information and Dates].	☐ **Yes** ☐ **No:** Do not proceed as your organisation will not have the ability to fulfil the requirements of the procurement.

Potential Supplier's Contact Officer

For all matters relating to this Response, the Potential Supplier's Contact Officer is:

Potential Supplier Name:	
Contact Name:	
Position:	
Telephone:	
Email Address:	
Postal Address:	

SAMPLE

Reference Number: << insert entity reference here >>

Page **20** of **34**

Released by the Department of Finance
under the Freedom of Information Act 1982

FOI 26-27/094 - Document 11

Procurement Connected Policies

Procurement Connected Policies (PCPs) place minimum requirements on businesses responding to tenders.

If a policy is relevant, it will be listed as a requirement within the ATM documentation. You **must** meet these minimum requirements to be considered for the work.

PCPs that may be relevant to your business

- Workplace Gender Equality Procurement Principles
- Indigenous Procurement Policy
- Australian Industry Participation
- Australian Skills Guarantee
- Payment Times PCP
- Environmentally Sustainable Procurement Policy
- Shadow Economy PCP

Detailed information on these policies are available on sellingtogov.finance.gov.au

Released by the Department of Finance
under the Freedom of Information Act 1982

FOI 26-27/094 - Document 11

Questions



If you have questions about the ATM before it closes, you can ask questions and have them answered.

- Submit questions in writing to the nominated contact officer
- Note the closing time for questions
- Answers are provided to all potential suppliers
- Addendum to the ATM for AusTender processes

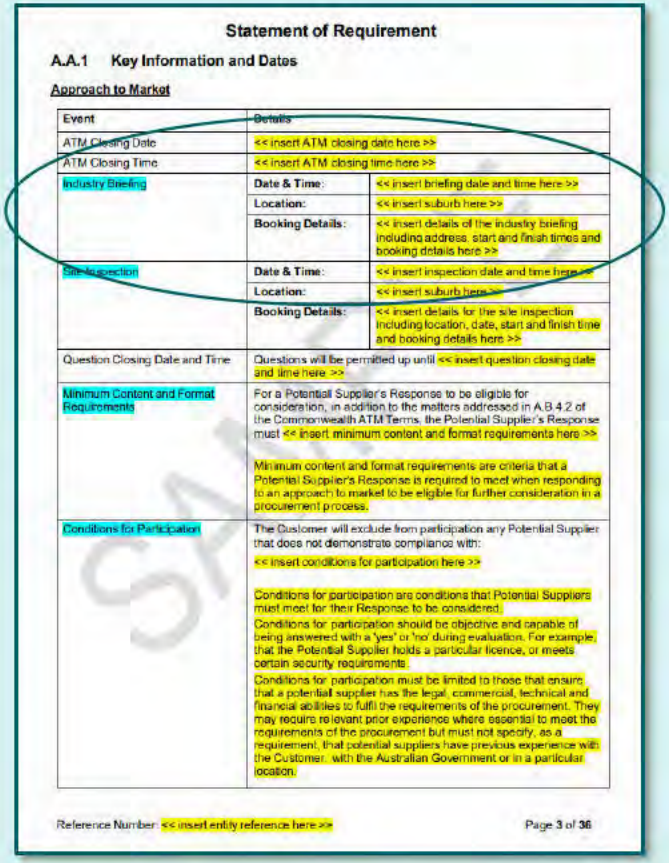
Released by the Department of Finance
under the Freedom of Information Act 1982

FOI 26-27/094 - Document 11

Briefing sessions

Be sure to attend an industry briefing if it is offered.

Industry briefings provide potential suppliers with an opportunity to engage directly with the buyer and increase understanding of tender requirements or processes.



Statement of Requirement

A.A.1 Key Information and Dates

Approach to Market

Event	Details	
ATM Closing Date	<< insert ATM closing date here >>	
ATM Closing Time	<< insert ATM closing time here >>	
Industry Briefing	**Date & Time:**	<< insert briefing date and time here >>
	Location:	<< insert suburb here >>
	Booking Details:	<< insert details of the industry briefing including address, start and finish times and booking details here >>
Site Inspection	**Date & Time:**	<< insert inspection date and time here >>
	Location:	<< insert suburb here >>
	Booking Details:	<< insert details for the site inspection including location, date, start and finish time and booking details here >>
Question Closing Date and Time	Questions will be permitted up until << insert question closing date and time here >>	
Minimum Content and Format Requirements	For a Potential Supplier's Response to be eligible for consideration, in addition to the matters addressed in A.B.4.2 of the Commonwealth ATM Terms, the Potential Supplier's Response must << insert minimum content and format requirements here >> Minimum content and format requirements are criteria that a Potential Supplier's Response is required to meet when responding to an approach to market to be eligible for further consideration in a procurement process.	
Conditions for Participation	The Customer will exclude from participation any Potential Supplier that does not demonstrate compliance with: << insert conditions for participation here >> Conditions for participation are conditions that Potential Suppliers must meet for their Response to be considered. Conditions for participation should be objective and capable of being answered with a 'yes' or 'no' during evaluation. For example, that the Potential Supplier holds a particular licence, or meets certain security requirements. Conditions for participation must be limited to those that ensure that a potential supplier has the legal, commercial, technical and financial abilities to fulfil the requirements of the procurement. They may require relevant prior experience where essential to meet the requirements of the procurement but must not specify, as a requirement, that potential suppliers have previous experience with the Customer, with the Australian Government or in a particular location.	

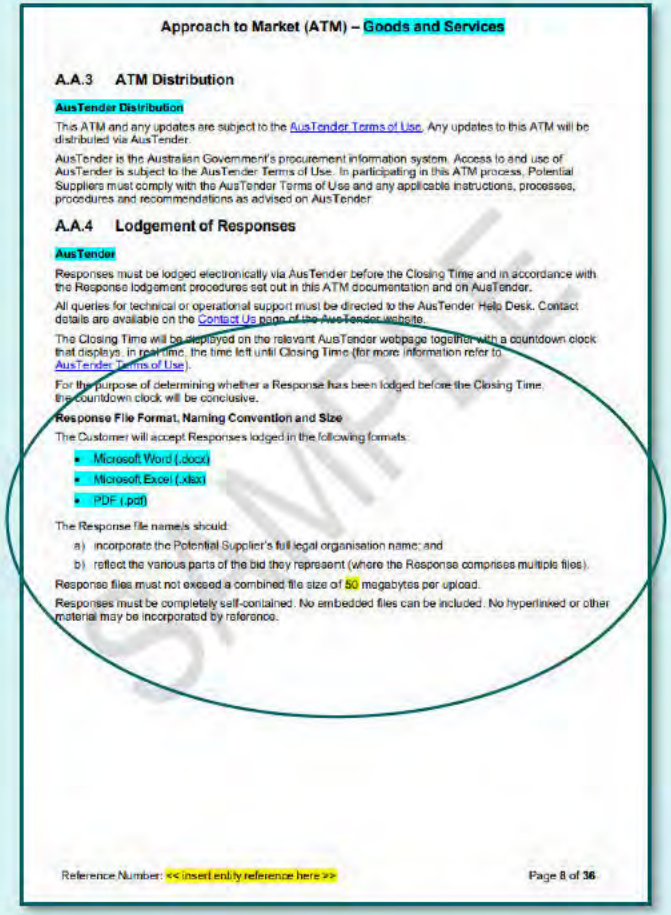
Reference Number: << insert entity reference here >> Page 3 of 36

Released by the Department of Finance
under the Freedom of Information Act 1982

FOI 26-27/094 - Document 11

Response format

Most ATMs will include a template response for you to complete. You will simply need to answer each of the criteria.



Approach to Market (ATM) – Goods and Services

A.A.3 ATM Distribution

AusTender Distribution

This ATM and any updates are subject to the AusTender Terms of Use. Any updates to this ATM will be distributed via AusTender.

AusTender is the Australian Government's procurement information system. Access to and use of AusTender is subject to the AusTender Terms of Use. In participating in this ATM process, Potential Suppliers must comply with the AusTender Terms of Use and any applicable instructions, processes, procedures and recommendations as advised on AusTender.

A.A.4 Lodgement of Responses

AusTender

Responses must be lodged electronically via AusTender before the Closing Time and in accordance with the Response lodgement procedures set out in this ATM documentation and on AusTender.

All queries for technical or operational support must be directed to the AusTender Help Desk. Contact details are available on the Contact Us page of the AusTender website.

The Closing Time will be displayed on the relevant AusTender webpage together with a countdown clock that displays, in real time, the time left until Closing Time (for more information refer to AusTender Terms of Use).

For the purpose of determining whether a Response has been lodged before the Closing Time, the countdown clock will be conclusive.

Response File Format, Naming Convention and Size

The Customer will accept Responses lodged in the following formats:

- Microsoft Word (.docx)
- Microsoft Excel (.xlsx)
- PDF (.pdf)

The Response file name/s should:

a) incorporate the Potential Supplier's full legal organisation name; and

b) reflect the various parts of the bid they represent (where the Response comprises multiple files).

Response files must not exceed a combined file size of 50 megabytes per upload.

Responses must be completely self-contained. No embedded files can be included. No hyperlinked or other material may be incorporated by reference.

Reference Number: <<Insert entity reference here>>

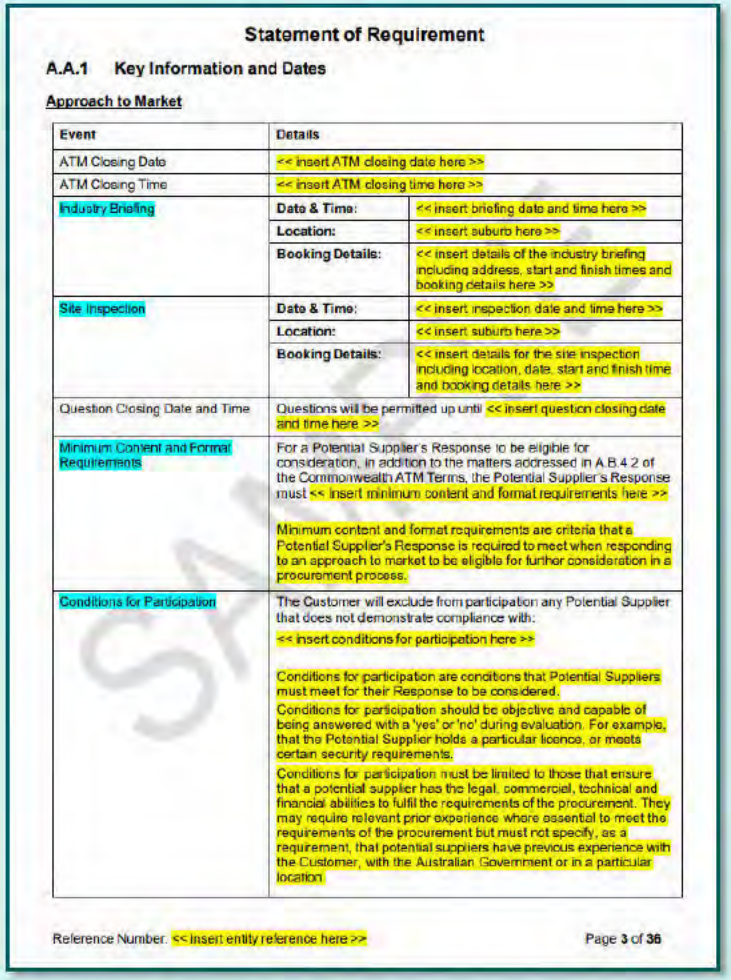
Page 8 of 36

Released by the Department of Finance
under the Freedom of Information Act 1982

Australian Government
Department of Finance | Selling to Government

FOI 26-27/094 - Document 1.1

Statement of requirement



Statement of Requirement

A.A.1 Key Information and Dates

Approach to Market

Event	Details	
ATM Closing Date	<< insert ATM closing date here >>	
ATM Closing Time	<< insert ATM closing time here >>	
Industry Briefing	Date & Time:	<< insert briefing date and time here >>
	Location:	<< insert suburb here >>
	Booking Details:	<< insert details of the industry briefing including address, start and finish times and booking details here >>
Site Inspection	Date & Time:	<< insert inspection date and time here >>
	Location:	<< insert suburb here >>
	Booking Details:	<< insert details for the site inspection including location, date, start and finish time and booking details here >>
Question Closing Date and Time	Questions will be permitted up until << insert question closing date and time here >>	
Minimum Content and Format Requirements	For a Potential Supplier's Response to be eligible for consideration, in addition to the matters addressed in A.B.4.2 of the Commonwealth ATM Terms, the Potential Supplier's Response must << insert minimum content and format requirements here >> Minimum content and format requirements are criteria that a Potential Supplier's Response is required to meet when responding to an approach to market to be eligible for further consideration in a procurement process.	
Conditions for Participation	The Customer will exclude from participation any Potential Supplier that does not demonstrate compliance with: << insert conditions for participation here >> Conditions for participation are conditions that Potential Suppliers must meet for their Response to be considered. Conditions for participation should be objective and capable of being answered with a 'yes' or 'no' during evaluation. For example, that the Potential Supplier holds a particular licence, or meets certain security requirements. Conditions for participation must be limited to those that ensure that a potential supplier has the legal, commercial, technical and financial abilities to fulfil the requirements of the procurement. They may require relevant prior experience where essential to meet the requirements of the procurement but must not specify, as a requirement, that potential suppliers have previous experience with the Customer, with the Australian Government or in a particular location	

Reference Number: << insert entity reference here >> Page 3 of 36

The statement of requirement, or statement of work, is the document that outlines the details of the goods or services that the Australian Government organisation wishes to buy.

48

Released by the Department of Finance
under the Freedom of Information Act 1982

FOI 26-27/094 - Document 11

Evaluation criteria

Procurements may include these evaluation criteria:

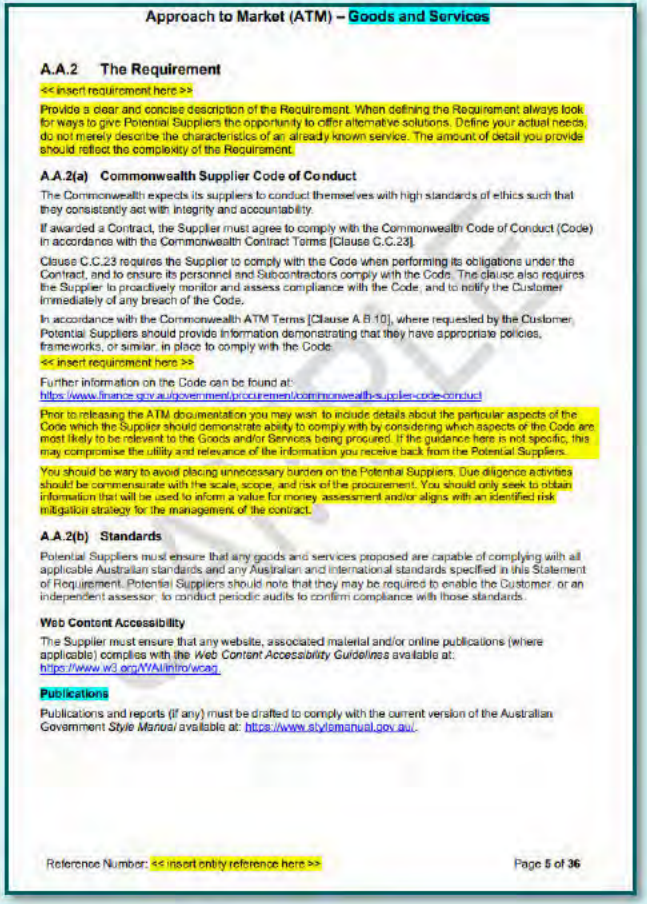
- financial and non-financial costs and benefits
- quality and quantity
- fit for purpose
- relevant experience and performance history
- flexibility of the proposal
- environmental sustainability
- whole-of-life costs

Released by the Department of Finance
under the Freedom of Information Act 1982

FOI 26-27/094 - Document 11

Supplier Code of Conduct

The Commonwealth Supplier Code of Conduct outlines the Commonwealth's minimum expectations of suppliers and their subcontractors while under contract with the Commonwealth.



Approach to Market (ATM) – Goods and Services

A.A.2 The Requirement

<< insert requirement here >>

Provide a clear and concise description of the Requirement. When defining the Requirement always look for ways to give Potential Suppliers the opportunity to offer alternative solutions. Define your actual needs, do not merely describe the characteristics of an already known service. The amount of detail you provide should reflect the complexity of the Requirement.

A.A.2(a) Commonwealth Supplier Code of Conduct

The Commonwealth expects its suppliers to conduct themselves with high standards of ethics such that they consistently act with integrity and accountability.

If awarded a Contract, the Supplier must agree to comply with the Commonwealth Code of Conduct (Code) in accordance with the Commonwealth Contract Terms [Clause C.C.23].

Clause C.C.23 requires the Supplier to comply with the Code when performing its obligations under the Contract, and to ensure its personnel and Subcontractors comply with the Code. The clause also requires the Supplier to proactively monitor and assess compliance with the Code, and to notify the Customer immediately of any breach of the Code.

In accordance with the Commonwealth ATM Terms [Clause A.B.10], where requested by the Customer, Potential Suppliers should provide information demonstrating that they have appropriate policies, frameworks, or similar, in place to comply with the Code.

<< insert requirement here >>

Further information on the Code can be found at:
https://www.finance.gov.au/government/procurement/commonwealth-supplier-code-conduct

Prior to releasing the ATM documentation you may wish to include details about the particular aspects of the Code which the Supplier should demonstrate ability to comply with by considering which aspects of the Code are most likely to be relevant to the Goods and/or Services being procured. If the guidance here is not specific, this may compromise the utility and relevance of the information you receive back from the Potential Suppliers.

You should be wary to avoid placing unnecessary burden on the Potential Suppliers. Due diligence activities should be commensurate with the scale, scope, and risk of the procurement. You should only seek to obtain information that will be used to inform a value for money assessment and/or aligns with an identified risk mitigation strategy for the management of the contract.

A.A.2(b) Standards

Potential Suppliers must ensure that any goods and services proposed are capable of complying with all applicable Australian standards and any Australian and international standards specified in this Statement of Requirement. Potential Suppliers should note that they may be required to enable the Customer, or an independent assessor, to conduct periodic audits to confirm compliance with those standards.

Web Content Accessibility

The Supplier must ensure that any website, associated material and/or online publications (where applicable) complies with the *Web Content Accessibility Guidelines* available at:
https://www.w3.org/WAI/intro/wcag

Publications

Publications and reports (if any) must be drafted to comply with the current version of the Australian Government *Style Manual* available at: https://www.stylemanual.gov.au/.

Reference Number: << insert entity reference here >> Page 5 of 36

Released by the Department of Finance
under the Freedom of Information Act 1982

FOI 26-27/094 - Document 11

Terms and conditions



Approach to Market (ATM) – Goods and Services

Commonwealth Approach to Market (ATM) Terms

A.B.1 Background

1.1 Some terms in this document have been given a special meaning. The meanings are set out either in the Commonwealth Contracting Suite Glossary and Interpretation, the CCS ATM or the draft Commonwealth Contract.

1.2 Any queries or complaints regarding this ATM must be directed to the Customer's relevant contact officer listed in the Statement of Requirement.

1.3 The Customer may:

a) amend or clarify any aspect of this ATM, prior to the Closing Time, or

b) suspend the ATM process or issue a Public Interest Certificate prior to Contract execution,

by issuing an addendum to the ATM in the same manner as the original ATM was distributed or, where this is not possible, issuing a notice to all Potential Suppliers.

1.4 No contract will exist until the Contract is executed by the Customer. The Customer, acting in good faith, may discontinue this ATM, decline to accept any Response to the ATM or issue any contract, or satisfy its requirements separately from this ATM process.

1.5 Participation in this process is at the Potential Supplier's risk and cost.

A.B.2 Precedence of Documents

2.1 If there is inconsistency between any of the parts of this ATM, the following order of precedence will apply:

a) CCS ATM – Statement of Requirement
b) CCS ATM Response Form
c) CCS ATM Annexes (if any)
d) Commonwealth ATM Terms
e) Additional Contract Terms (if any)
f) Commonwealth Contract Terms
g) draft Commonwealth Contract (if any), and
h) CCS Glossary and Interpretation,

so that the provision in the higher ranked document will prevail to the extent of the inconsistency.

A.B.3 Referenced Material

3.1 The Customer will make available the Customer's Material (if any) referenced in this ATM. Potential Suppliers are responsible for obtaining all other Referenced Material (if any).

3.2 Potential Suppliers are responsible for considering Referenced Material in framing their Response.

A.B.4 Lodging a Response

4.1 By lodging a Response, Potential Suppliers agree:

a) that their Response is subject to these Commonwealth ATM Terms

b) that the Response will remain open for acceptance for ninety (90) calendar days from the ATM Closing Time, and

c) if successful, to sign a Contract which incorporates the Commonwealth Contract Terms.

4.2 When lodging a Response, Potential Suppliers must:

a) lodge their Response as specified in the Statement of Requirement, using the CCS ATM Response Form provided (if any) without changing the structure or formatting of the response form

b) comply with any conditions for participation and ensure their Response complies with any minimum content and format requirements set out in the Statement of Requirement

c) prepare the Response s in English, and

d) ensure that prices quoted:

i. are in Australian currency

ii. show the GST exclusive price, the GST component (if any) and the GST inclusive price

iii. are inclusive of GST and all other taxes, duties (including any customs duties) and any government charges imposed or levied in Australia or overseas, and

iv. unless identified in the Potential Supplier's Response, include any and all other charges and costs and be the maximum payable by the Customer under the Contract.

4.3 The Customer may decline to consider a Response that is unclear, to be read or contains alterations, erasures, illegibility, ambiguity or incomplete details.

4.4 Potential Suppliers may submit Responses for alternative methods of addressing the Customer's Requirement described in this ATM, where the option to do so was stated in the ATM or agreed in writing with the Customer prior to the Closing Time. Potential Suppliers are responsible for providing sufficient level of detail about the alternative solution to enable its evaluation.

4.5 Potential Suppliers and their officers, employees, agents, advisers and proposed subcontractors must not engage in any collusive, anti-competitive or any other similar conduct with any other Potential Supplier or person, or offer any unlawful inducements in relation to their Response or this ATM process.

4.6 The Customer will not extend the Closing Time in exceptional circumstances and, if extended, the extension will apply equally to all Potential Suppliers. The Customer will not consider any Responses received after the Closing Time specified in this ATM unless the Response is late as a consequence of the Customer's mishandling.

4.7 Prior to execution of a contract, the Customer may seek clarification or additional information from and enter into discussions and negotiations with any or all Potential Suppliers in relation to their Response. In doing so, the Customer will treat all Potential Suppliers equitably and not allow any Potential Supplier to substantially alter their Response.

4.8 If any Conflicts of Interest arise during the evaluation period, Potential Suppliers must notify

Date Published: 1 July 2024 Version: 8.0 Page 1 of 3

Reference Number: << insert entity reference here >> Page 12 of 36

- The draft contract gives you a chance to see the terms and conditions under which your business would be contracted if you are successful.
- You may be asked to confirm in your tender response whether your business complies with the terms and conditions.

51

Released by the Department of Finance
under the Freedom of Information Act 1982

FOI 26-27/094 - Document 11

Referees



Ask your referees if they wish to give a reference for you before including them in your response.

- Reference checks are usually made when your business may become a preferred supplier (but not always).
- You should select referees for whom you have worked so they can verify the claims you have made in your tender.

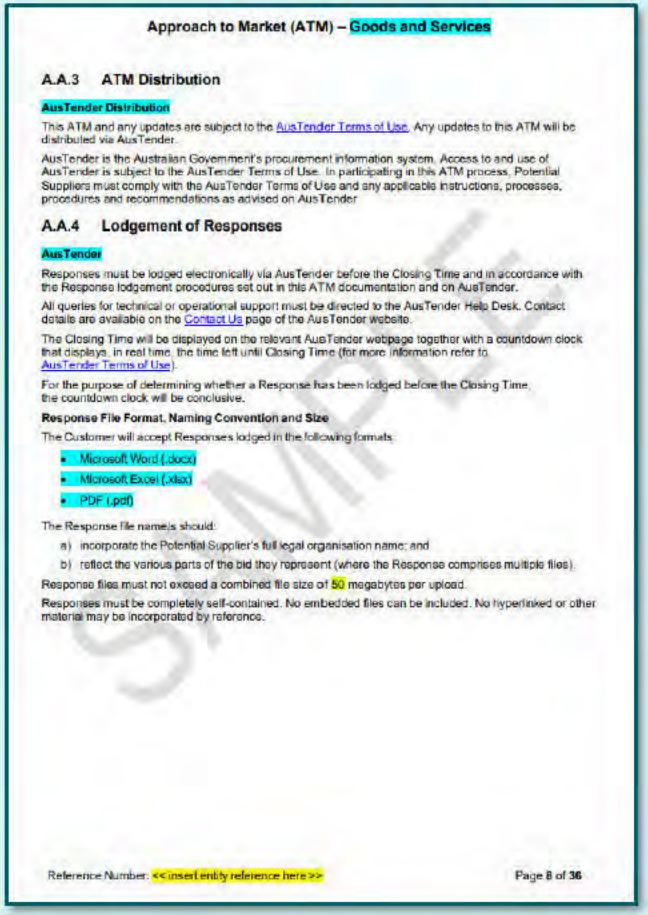
Released by the Department of Finance
under the Freedom of Information Act 1982

FOI 26-27/094 - Document 11

Before you lodge

Before you lodge your submission:

- Review, edit, and check again.
- Check your response is in the requested format with all required documentation.
- Plan to submit early.



Approach to Market (ATM) – Goods and Services

A.A.3 ATM Distribution

AusTender Distribution

This ATM and any updates are subject to the AusTender Terms of Use. Any updates to this ATM will be distributed via AusTender.

AusTender is the Australian Government's procurement information system. Access to and use of AusTender is subject to the AusTender Terms of Use. In participating in this ATM process, Potential Suppliers must comply with the AusTender Terms of Use and any applicable instructions, processes, procedures and recommendations as advised on AusTender.

A.A.4 Lodgement of Responses

AusTender

Responses must be lodged electronically via AusTender before the Closing Time and in accordance with the Response lodgement procedures set out in this ATM documentation and on AusTender.

All queries for technical or operational support must be directed to the AusTender Help Desk. Contact details are available on the Contact Us page of the AusTender website.

The Closing Time will be displayed on the relevant AusTender webpage together with a countdown clock that displays, in real time, the time left until Closing Time (for more information refer to AusTender Terms of Use).

For the purpose of determining whether a Response has been lodged before the Closing Time, the countdown clock will be conclusive.

Response File Format, Naming Convention and Size

The Customer will accept Responses lodged in the following formats:

- Microsoft Word (.docx)
- Microsoft Excel (.xlsx)
- PDF (.pdf)

The Response file name/s should:

a) incorporate the Potential Supplier's full legal organisation name; and

b) reflect the various parts of the bid they represent (where the Response comprises multiple files).

Response files must not exceed a combined file size of 50 megabytes per upload.

Responses must be completely self-contained. No embedded files can be included. No hyperlinked or other material may be incorporated by reference.

Reference Number: << insert entity reference here >>

Page 8 of 36

Released by the Department of Finance
under the Freedom of Information Act 1982



Situation

Task

Action

Result

Use a structured methodology (STAR).

- Set the scene and describe the problem to be addressed
- Outline what the statement of requirements is asking you to deliver
- Explain the steps to be taken
- Detail the expected outcome/result

Released by the Department of Finance
under the Freedom of Information Act 1982

FOI 26-27/094 - Document 11

When writing your tender response, remember to:

- Substantiate your claims
- Be truthful and honest
- Focus on what your business can do
- Utilise the maximum word limit
- Explain how your proposal reduces risk
- Outline how you provide value for money



Things to avoid:

Including significant amounts of marketing and promotional material

Being critical of your competitors

Assuming the Government knows and understands your capabilities

Released by the Department of Finance
under the Freedom of Information Act 1982

FOI 26-27/094 - Document 11

Things to watch out for

- Cutting and pasting text from previous tender submissions
- Repetition and using broad or vague statements
- Including verbose or overly complicated language
- Forgetting to contact your referees
- Assuming the evaluation process

56

Released by the Department of Finance
Under the Freedom of Information Act 1982

FOI 26-27/094 - Document 11

Common pitfalls



Released by the Department of Finance
under the Freedom of Information Act 1982

Australian Government
Department of Finance

Selling to Government

FOI 26-27/094 - Document 11

Check

01 Have you responded to all the requirements?

02 Have you asked and received answers for questions?

03 Can you submit using the submission method?

04 Have you proofread your submission and had it checked by two or more others?

05 Is your response clear, easy to understand, and to the point?

06 Have you addressed all mandatory conditions for participation and evaluation criteria?

07 Have you demonstrated value for money?

08 Have you emphasised what sets you apart from your competitors?

Released by the Department of Finance
Under the Freedom of Information Act 1982

FOI 26-27/094 - Document 11

Find out more

Selling to Government website

- Guidance on rules and processes involved
- Information for each step of the procurement process
- Key resources for where to go and who to connect with



Visit the AusTender Help and Information Centre (help.tenders.gov.au)



Released by the Department of Finance
under the Freedom of Information Act 1982

FOI 26-27/094 - Document 11

Australian Government
Department of Finance | Selling to Government

Questions and feedback

Feedback

sellingtogov.finance.gov.au/feedback/supplier-introduction

Contact us

sellingtogov.finance.gov.au/contact-us

Released by the Department of Finance
under the Freedom of Information Act 1982

FOI 26-27/094 - Documnt 12

Australian Government

Department of Finance

ATM – FIN/MASR2-RFT

ADDENDUM NUMBER 4

Management Advisory Services for the Australian Government

Refresh Phase 2 – Corporate and Commercial Management Advisory Services and Investment Banking Services

Date of Issue for this Addendum: 15 April 2025

This Addendum is issued in accordance with paragraphs 5.2 and 6.2 of the Request for Tender

Answering Questions

Please note that due to the high volume of enquiries and reduced staffing profile over the Easter – ANZAC Day holiday period, minor delays may be experienced in receiving responses to questions submitted to the MAS Refresh inbox and through the 360 Public Portal.

All questions received between Friday 18 – Monday 28 April will be answered via direct response and/or Addendum no later than 2 May 2025.

Industry Briefing

A reminder that the recorded Industry Briefing and Building Your Best Tender Response Workshop can be found at Attachment A to Addendum 3 of this RFT.

Question 1	
Question	Could you please advise whether the Department of Finance allows amendments to the Panel Head Agreement?
Answer	In the 360 Public Portal, Section 1 provides Respondents with the opportunity to confirm compliance with the **Head Agreement (Attachment C)**, or raise Head Agreement non-compliances. Respondents should note Finance's right at paragraph 9.18.1(w) to exclude a Tender from consideration if the Respondent does not agree to the terms and conditions of the **Head Agreement at Attachment C** without amendment.

Released by the Department of Finance
under the Freedom of Information Act 1982

Question 2	
Question	How should a Respondent answer questions about Personnel Levels and Expert Personnel if they are a sole trader but also an expert?
Answer	Section 10-31, Question 30 requires at least one personnel to be nominated, corresponding with Personnel Classifications and Expected Work Level Standards, available at **Schedule 12 of Attachment C - Head Agreement**. This is required for Stage 3 – Financial Analysis, and will be populated into a Successful Respondent's Head Agreement. Expert Personnel are Key Personnel that with regards to their experience and recognition are higher than 'Level 6', and any personnel nominated for Personnel Classification level 1-6, would not be considered as Expert Personnel. Finance considers that sole traders that are 'expert level' would fit into the definition of a Level 6. Therefore, the answer to Section 10-31, Question 31 for a sole trader should be "No".

Question 3	
Question	Can we have more information on what services would be included in the XX Service Subcategory.
Answer	Information on what is considered in-scope of the Service Subcategories can be found in **Attachment B – Scope of Services**. The Service Descriptors in **Attachment B** have been drafted in a deliberately broad manner to ensure that Commonwealth Entities have access to a comprehensive range of services within the relevant Service Descriptors. It is up to Respondents to determine if their service offerings fit within the broad Service Subcategories.

Question 4	
Question	How many referees per project example are required - one or two? The response form reads as if there are two referees per example, per subcategory.
Answer	With reference to clause 8.3.2 on page 17 of the RFT, Respondents should provide two Referee Endorsements for each Service Subcategory. Two examples of organisational/personnel experience are required for each Service Subcategory – each requiring one Referee Endorsement. There are two different questions on referees per example of demonstrated experience that a Respondent will be able to see in the download. These questions will trigger in the 360 Public Portal based on the example selected by a Respondent as either demonstrating personnel experience or organisational experience.

Released by the Department of Finance
under the Freedom of Information Act 1982

Question 5	
Question	In some case the referee has moved employers since the works have been completed. Does the department have any issues with providing contact details at new employer/private email?
Answer	Referees can provide an Endorsement if the referee can attest firsthand to work completed as detailed in a Respondent's previous experience example. Respondents have the option to add a "Note to the evaluator" when nominating a referee, which can be used to explain a referee's change in employment if necessary.

Question 6	
Question	If a Respondent who provides services to the Commonwealth selects Personnel experience rather than organisation experience to support a Service Subcategory, will this reflect negative in evaluation?
Answer	Finance will assess examples of demonstrated experience provided by Respondents based on the evaluation criteria set out in section 11.4.2 on pages 41-2 of the RFT: (a) the extent to which the Respondent demonstrates its capability and capacity to provide the Offered Services to the Australian Government; and (b) the extent to which the Respondent demonstrates its organisational experience, or where organisational experience cannot be provided, its personnel's experience, within the last 5 years providing the Offered Services to the Australian Government, other governments and/or large corporate organisations, which will take into account: i. the examples provided by the Respondent to demonstrate its organisational experience, or where organisational experience cannot be provided, examples to demonstrate its personnel's experience, and how the experience relates to the definition of Management Advisory Services; and ii. the Referee Endorsements submitted for the Respondent and/or its personnel and the extent to which these Referee Endorsements support the Respondent's or its personnel's claimed experience. Finance will not discount a Respondent on the sole basis for selecting one type of claimed experience (i.e. personnel experience or organisation experience) over another. The decision of whether to provide organisational experience or personnel experience is a matter for Respondents to determine.

Question 7	
Question	How long will Referee Endorsements take to complete?
Answer	It is expected that Referee Endorsements should take approximately 5-10 minutes to complete.

Released by the Department of Finance
under the Freedom of Information Act 1982

Question 8	
Question	What is specifically included in the Referee Endorsement?
Answer	Referees will be asked to verify the Respondent's claims in response to the 360 Public Portal Questionnaire. Answers that will be provided to referees are flagged in the "Instructions/Notes" section of each relevant question. There is opportunity for referees to provide comments about any questions asked, but they are only required to do so when they indicate discrepancies between the services delivered and the written example. There is also space for referees to provide any additional comments they may have.

Question 9	
Question	Will referees need to create a username and password for the 360 Public Portal?
Answer	Referees will be sent a single-sign-on link and will not be required to make an account or set up any multi-factor authentication.

Question 10	
Question	Due to the sensitive nature of our work, we cannot disclose the name of our client. Will we be penalised for not including this?
Answer	Finance will not disregard any example on the sole basis that the Respondent cannot disclose a client's name. However, it would be important for the Respondent to consider how this may affect the detailed description of work and Referee Endorsement for the example. Ultimately it is up to Respondents to consider and assess their own ability to be able to satisfy the evaluation criteria requirements of the RFT, as set out in section 11.4.2 on pages 41-2.

-- End of Addendum --

Released by the Department of Finance
under the Freedom of Information Act 1982

FOI 26-27/094 - Document 13

Australian Government

Department of Finance

ADDENDUM NUMBER 5 – FIN-2025-MASR2-RFT

MANAGEMENT ADVISORY SERVICES FOR THE AUSTRALIAN GOVERNMENT REFRESH PHASE 2 – CORPORATE AND COMMERCIAL MANAGEMENT ADVISORY SERVICES AND INVESTMENT BANKING SERVICES

Date of Issue for this Addendum: 24 April 2025

This Addendum is issued in accordance with paragraphs 5.2 and 6.2 of the Request for Tender (RFT).

This Addendum 4 provides:

- a reminder to potential Tenderers that the recorded Industry Briefing and Building Your Best Tender Response Workshop can be found at **Attachment A** to **Addendum 3** issued on 10 April 2025; and
- responses to questions raised by prospective Tenderers.

Answering Questions

Please note that due to the high volume of enquiries and reduced staffing profile over the Easter and ANZAC Day holiday period, minor delays may be experienced in receiving responses to questions submitted to the MAS Refresh inbox and through the 360 Public Portal.

All questions received between Friday 18 and Monday 28 April will be answered via direct response and/or Addendum no later than 2 May 2025.

RFT questions and responses

Question 1	
Question	Can the department of Finance (Finance) advise whether the "Strategic Procurement Advice" category encompasses the procurement of real estate/property assets
Answer	Information on what is considered in-scope of the Strategic Procurement Advice Service Subcategory can be found in **Attachment B – Scope of Services**. The Service Descriptors in **Attachment B** have been drafted in a deliberately broad manner to ensure that Commonwealth Entities have access to a comprehensive range of services within the relevant Service Descriptors. It is up to Respondents to determine if their service offerings fit within the broad Service Subcategories.
Question 2	
Question	Could Finance advise whether we are able to submit updated rate cards for categories for which we are already approved on the panel?
Answer	Respondents are not permitted to submit revised rates for Service Subcategories already in the Respondent's Head Agreement under this refresh process.

Released by the Department of Finance
under the Freedom of Information Act 1982

Question 3	
Question	In response to the requirement regarding the capability to deliver invoices via the Pan-European Public Procurement On-Line (PEPPOL) Framework: our current accounting software is compatible with the PEPPOL Framework. However, as a small business, we prefer to avoid managing multiple invoicing platforms where possible. Could you kindly confirm whether opting not to utilise the PEPPOL Framework would affect our eligibility for appointment to the MASR2 Panel?
Answer	As detailed on pages 72 and 77 of **Attachment C** (Head Agreement) of the Request for Tender (RFT), a Respondent's capability to deliver and receive e Invoices through the PEPPOL Framework determines the Payment Terms (i.e. 5 days where PEPPOL is utilised, 20 days if it is not). If a Respondent opts not to use the PEPPOL Framework it will not impact its eligibility for appointment to the MASR2 Panel.
Question 4	
Question	Could Finance confirm whether there is a limit for number of Expert Personnel nominated?
Answer	Finance confirms there is no limit on the number of Expert Personnel a Respondent can nominate. The Respondent should note that as stated in **paragraph 11.5.2 of the RFT**: *In assessing if each Respondent's Fees contributes to a value for money outcome for a Service Subcategory, the Tender Evaluation Team will undertake a comparative analysis of Respondents' Fees, and may:* …. *b) consider the number of proposed FTE in the nominated Service Subcategory that are Expert Personnel (if any) in comparison to the total number of FTE and how this may impact on Fees;*
Question 5	
Question	Could Finance please confirm if the first fee adjustment under **Clause 14.2 of Attachment C** will occur on 1st July 2027, given that the approved categories of the current refresh will commence in March 2026?
Answer	Finance has amended **clause 14.2.2 of Attachment C** (Head Agreement) so that the first fee adjustment for both new and varied Head Agreements commences on 1 July 2026. Please refer **Amendments to the RFT documentation** table below.
Question 6	
Question	Could Finance confirm whether a Respondent would be able to use case studies from a parent company or subsidiary? May a Respondent put forward CVs of personnel that are not directly employed by the Respondent, but by other regional divisions instead?
Answer	The Respondent should only use case studies that demonstrate the Respondent's experience and capability – not that of a parent company or any subsidiaries. Respondents may choose to put forward CVs of personnel not directly employed by the Respondent entity (for example, employed by a Respondent's other regional divisions), provided the Respondent can successfully demonstrate how it can readily draw upon indirectly employed personnel to provide the relevant services.

Released by the Department of Finance
under the Freedom of Information Act 1982

Question 7	
Question	Could Finance confirm whether we need to indicate the Personnel Level for our nominated personnel in the summary of relevel skills and experience?
Answer	Finance confirms that Respondents are not required to indicate the Personnel Level for nominated personnel in the summary of relevel skills and experience.
Question 8	
Question	The response format focusses quite tightly on consulting experience from the last five years in the relevant Service Subcategories. This format provides limited opportunities to demonstrate longer-term experience as a practitioner in the relevant fields, prior to moving into consultancy. One example of this would be a Respondent with an extensive career over 30 years of experience in service delivery combining both public and private sector delivery of infrastructure projects. Can Finance suggest how to incorporate such experience and not be disadvantaged by having made the transition to consulting relatively recently?
Answer	The response format deliberately seeks examples of recent experience (i.e. within the last 5 years) to demonstrate that Respondents currently possess the necessary capability and capacity to undertake the relevant services. Many of the Service Categories under this refresh process are dynamic and subject to constantly evolving delivery methods, standards and frameworks. Accordingly, Respondents are requested to focus tender responses on their recent experience to demonstrate the relevance of their service capabilities. A Respondent may choose to include in its tender response the longer-term experience of its organisation and/or personnel, for example by detailing the number of years it or its personnel have been providing the services, and in what capacity. However, as much as possible, Respondents should focus on recent examples (i.e. within the last 5 years) that demonstrate its current capability and capacity to undertake the relevant Service Category/ies.

Amendments to RFT documentation

Question that the change relates to	Reference	Previous Wording	New Wording
5	Attachment C (Head Agreement) clause 14.2.2, page 26	If Services, Service Areas, Service Categories, or Subcategories are added to this Head Agreement after the Head Agreement Commencement Date, they will be included in the Fee increase under this clause 14.2 no earlier than 12 months after the date they are added to this Head Agreement.	If Services, Service Areas, Service Categories, or Subcategories are added to this Head Agreement after the Head Agreement Commencement Date, the Service Provider will be awarded an increase to the Fees for those Services, Service Areas, Service Categories, or Subcategories in the Relevant Schedule in accordance with this clause 14.2, to take effect from 1 July 2026.

-- End of Addendum --

Released by the Department of Finance
under the Freedom of Information Act 1982

Australian Government

Department of Finance

ADDENDUM NUMBER 6 – FIN/MASR2-RFT

MANAGEMENT ADVISORY SERVICES FOR THE AUSTRALIAN GOVERNMENT REFRESH PHASE 2 – CORPORATE AND COMMERCIAL MANAGEMENT ADVISORY SERVICES AND INVESTMENT BANKING SERVICES

Date of Issue for this Addendum: 14 May 2025

This Addendum is issued in accordance with paragraphs 5.2 and 6.2 of the Request for Tender (RFT).

This Addendum 6 provides:

- a reminder to potential Respondents of Enquiry Cut-off Date of 20 May 2025; and
- responses to questions raised by potential Respondents.

Reminder – Enquiry Cut-off Date

Finance would like to remind potential Respondents that, as per **paragraph 4.1** of the RFT, the Enquiry Cut-off Date is 5pm (Canberra local time) Tuesday 20 May 2025.

Please note that as per **section 6.1.4** of the RFT, Enquiries received after the Enquiry Cut-off Date will not be answered unless Finance determines it would be in the interest of any or all Respondents to provide a response to the enquiry.

RFT questions and responses

Question 1	
Question	Will the skills of subcontractors be taken into consideration or are you only able to tender for a subcategory if you have an employee/s with the relevant skills? In some instances, we may not have an employee with relevant skills for a subcategory but rather we have a long-term subcontractor with the relevant skills, will we be able to include the skills of these team members in our submission?
Answer	Questions 2, 3, and 4 in Sections 10-31 of the 360 Public Portal questionnaire specifically reference the full-time equivalent (FTE) personnel (not including subcontractors) of the Respondent's organisation. Therefore, Finance will not consider the qualifications and professional recognition or skills and experience of a subcontractor to be relevant to these questions. However, Finance will consider Responses that detail subcontracting arrangements in their examples of demonstrated experience under a relevant Service Subcategory. In its response to the Evaluation Criteria, a Respondent should make any subcontracting arrangements clear, including how these arrangements demonstrate a Respondent's organisational experience.

Released by the Department of Finance
under the Freedom of Information Act 1982

Question 2	
Question	Is internal audit certification a mandatory requirement for staff involved in audit and assurance activities?
Answer	Finance confirms that no internal audit certification is required for Respondents to be evaluated for any Service Subcategories under MAS Refresh 2 (FIN/MASR2-RFT).

Question 3	
Question	What exactly will be asked of referees? Will our responses to the entire questionnaire be visible to them?
Answer	Referees will only be asked to verify the Respondent's claims in response to the 360 Public Portal Questionnaire. Answers that will be provided to referees are flagged in red text in the "Instructions/Notes" section of each relevant question. It is expected that Referee Endorsements should take approximately 5-10 minutes to complete. There is opportunity for referees to provide comments about any questions asked, but they are only required to do so when they indicate discrepancies between the services delivered and the written example. There is also space for referees to provide any additional comments they may have.

Question 4	
Question	Regarding Section 10-31, Question 3: "Provide a summary of the relevant qualifications and professional recognition these personnel have to provide advisory services in the … Service Subcategory." Can you please give a broad description of what the department means (and doesn't mean) by "professional recognition"?
Answer	"Professional recognition" in this context broadly refers to any accreditation, certification and/or membership relevant to the selected Service Subcategory held by the Respondent's personnel that demonstrates their capability and experience. Recognition may also refer to recognised and relevant industry standards held by a Respondent's personnel.

Question 5	
Question	Are ICT/training/recruitment/scientific services in scope of the Panel?
Answer	Information on what is considered in-scope and out-of-scope of FIN/MASR2-RFT can be found in Attachment B – Scope of Services, and sections 1.2 and 1.3 of the RFT.

Released by the Department of Finance
under the Freedom of Information Act 1982

Question 6	
Question	Subcategory responses, question 8: "The Respondent is required to provide additional details about 2 engagements that relate to xx subcategory". Do the 2 engagements need to have been listed in the five engagements at preceding question 7 (i.e. " A brief description of up to 5 xx advisory engagements undertaken in the last 5 years"?
Answer	Finance confirms that the two detailed examples of demonstrated experience do not need to be referenced in the preceding question 6 or 7.

Question 7	
Question	There are new Service Descriptors under the Subcategory that my company is approved for. Do we need to retender to gain access to these services?
Answer	As stated in paragraph 3.1.4 of the RFT: *Respondents who are already approved as service providers for a Corporate and Commercial Management Advisory Service Subcategory (include a Service Subcategory with updated Service Descriptors as set out in Attachment B – Scope of Services), or the Investment Banking Service Subcategory, do not need to retender for those Service Subcategories contained in their Head Agreement.*

Question 8	
Question	Are you able to provide guidance on how to present newly acquired capability, specifically is a service sub-category has been attained through an acquisition of people and skills but the organization is yet to deliver under its name using these people and skills
Answer	If a Respondent is unable to provide organisational experience (i.e. previous work done under the organisation name) there are options in the 360 Public Portal to provide examples of personnel experience. In any Section 10-31, Question 5, 8, and 19 will offer the Respondent the option to demonstrate either organisational experience or personnel experience in the subsequent questions.

Question 9	
Question	Can you please provide guidance on the seniority or position requirements to be a nominated referee. For example, EL1 or middle management and above?
Answer	There are no seniority requirements for referees, it is up to Respondents to consider and assess their own ability to be able to satisfy the evaluation criteria requirements of the RFT, as set out in section 11.4.2 on pages 41-2.

Released by the Department of Finance
under the Freedom of Information Act 1982

Question 10	
Question	Will a referee be accepted if they no longer hold the position they were in during the contract period i.e. change of role, job, or retired?
Answer	Referees can provide an Endorsement if the referee can attest firsthand to work completed as detailed in a Respondent's previous experience example. Respondents have the option to add a "Note to the evaluator" when nominating a referee, which can be used to explain a referee's change in employment if necessary.

Question 11	
Question	Is there an opportunity to attach supporting material, e.g. CVs, diagrams etc.?
Answer	Due to the high volume of anticipated Respondents to the RFT, it is Finance's expectation that Respondents will answer the 360 Public Portal questionnaire within the word limits provided and not deviate from the questions asked. Finance will not accept any supporting material, attachments or links to outside material which is not specifically asked for in the 360 Public Portal.

Question 12	
Question	May we include examples for projects that started outside of the 5 year window but finished within the last 5 years?
Answer	Finance will not discount an example based solely on the fact that the engagement began more than 5 years ago. However, the response format deliberately seeks examples of recent experience (i.e. within the last 5 years) to demonstrate that Respondents currently possess the necessary capability and capacity to undertake the relevant services. Many of the Service Subcategories under this refresh process are dynamic and subject to constantly evolving delivery methods, standards and frameworks. Accordingly, Respondents are requested to focus tender responses on their recent experience to demonstrate the relevance of their service capabilities

Question 13	
Question	Are we able to include ongoing projects? Or those that are due to finish around the date that the tender closes?
Answer	Examples of Respondent's demonstrated experience will be assessed against the evaluation criteria set out in section 11.4.2 on pages 41-2 of the RFT. Finance will not discount an example based solely on the fact that the engagement is ongoing or incomplete. However, examples that comprehensively demonstrate experience, including the achievement of service outcomes may be evaluated more favourably against the evaluation criterion.

Released by the Department of Finance
under the Freedom of Information Act 1982

Question 14	
Question	Is there a preference as to where in the application we convey our subject matter expertise? In the section about our organisation, in the bios, in the projects or other?
Answer	Respondents should convey their subject matter and organisational expertise throughout its Tender Response in the 360 Public Portal free-text fields where relevant to the question being addressed. For example, a Respondent's business strategy personnel expertise should be detailed in response to question 10.4 that asks: Provide a summary of the relevant skills and experience these personnel have to provide advisory services in the Business Strategy and Improvement Service Subcategory.

Question 15	
Question	Please clarify how we should submit our pricing. Is there a template we should complete and upload in the 360 portal?
Answer	Respondents are required to submit pricing for all Service Subcategories they are tendering for in Question 30 of the relevant Section (10-31) in the 360 Public Portal.

Question 16	
Question	Can the experience from acquired companies be used to demonstrate organisational experience?
Answer	Finance will consider any acquired company's organisational capacity, capability, and experience relevant to the Respondent. Therefore, engagements undertaken by the acquired company may be claimed as organisational experience by the Respondent.

Question 17	
Question	In the referee questions and Attachment E, it states "DO NOT select 'Lock Referee List & Send Requests' prior to completing all questions relating to this example". 'Lock Referee List & Send Requests' is not showing in the 360 Public Portal, what should I do?
Answer	Due to a system update in the 360 Public Portal, this question no longer shows a button to 'Lock Referee List & Send Requests'. Continue to complete your Response as prompted. Referee requests will be sent out after the Closing Time of 2:00 pm (Canberra local time) Tuesday 3 June 2025.

Released by the Department of Finance
under the Freedom of Information Act 1982

Question 18	
Question	We have a different way of pricing our services which don't include hourly rates, to create better value for money. How can we capture this in our response?
Answer	As stated in section 8.2 of the RFT, it is a minimum content and format requirement of FIN/MASR2-RFT that all Fees must be submitted in the form of hourly rates and Australian dollars. Therefore, Finance will not accept daily rates or assignment-based rates when responding to this RFT.

Question 19	
Question	How do we know if we need additional STRs?
Answer	Please refer to Attachment H – Guidance on the Shadow Economy Procurement Connected Policy for information on what different types of STRs can look like, and the documents required by each. Examples of STRs specific to different corporate structures are provided in Attachment H, which includes content regarding the need to provide additional STRs. These examples can be used to assist you in reviewing your STRs. Please note that these are examples only, and Respondents should review their STRs for confirmation of the requirement to supply additional STRs. For clarity, if the Respondent's STR has an "Other required documents" section, additional STRs **will** be required to satisfy the Shadow Economy Procurement Connected Policy. **Please note that, as per section 11.4.5 of the RFT:** ***If a Respondent does not submit all Valid and Satisfactory STR(s) that satisfy the requirements set out above, subject to paragraph 9.7, the Respondent's Tender will be excluded from further consideration.***

Question 20	
Question	We cannot find question 6 (or 7) in the 360 Public Portal. Has it been intentionally left off?
Answer	Question 6 in any of the sections 10-31 will appear depended on a Respondent's answers to the previous question. If the Respondent selects "No" in response to question 5, they will be sent to question 7, if they select "Yes" in response to question 5, they will see question 6 (but not question 7). Respondents must select either "Yes" or "No" in response to question 5 for question 6 or 7 to appear in the 360 Public Portal.

-- End of Addendum --

Released by the Department of Finance
under the Freedom of Information Act 1982

Australian Government

Department of Finance

ADDENDUM NUMBER 7 – FIN/MASR2-RFT

MANAGEMENT ADVISORY SERVICES FOR THE AUSTRALIAN GOVERNMENT REFRESH PHASE 2 – CORPORATE AND COMMERCIAL MANAGEMENT ADVISORY SERVICES AND INVESTMENT BANKING SERVICES

Date of Issue for this Addendum: 23 May 2025

This Addendum is issued in accordance with paragraphs 5.2 and 6.2 of the Request for Tender (RFT).

This Addendum 7 provides:

- An amendment to Attachment J – Respondent's Declaration Information; and
- responses to questions raised by potential Respondents.

Amendment – Attachment J – Respondent's Declaration Information

Original Reference	Previous Wording	New Wording	Change
Attachment J - Paragraph 19	The Respondent acknowledges that if it is successful and it does not comply with the requirements outlined in paragraph 19 that it will be a breach of the Head Agreement.	The Respondent acknowledges that if it is successful and it does not comply with the requirements outlined in paragraph 18 that it will be a breach of the Head Agreement.	The reference to paragraph 19 has been corrected to Paragraph 18.

RFT questions and responses

Question 1	
Question	Please clarify if the Respondent can provide amendments to the Head Agreement. If amendments are permitted, can the respondent 'mark up' the Head Agreement and submit it with the tender submission, or can the Department share a departures table?
Answer	In the 360 Public Portal, Section 1 provides Respondents with the opportunity to confirm compliance with the Head Agreement (Attachment C) or raise Head Agreement non-compliances. Please note section 3.3.1 of the RFT which states: *Successful Respondents, who are not already existing Service Providers under the current Panel, will be required to enter into a Head Agreement with the Commonwealth under the terms and conditions at Attachment C – Head Agreement. Respondents should note Finance's right at paragraph 9.18.1(w) to exclude a Tender from consideration if the Respondent does not agree to the terms and conditions of the Head Agreement at Attachment C without amendment.*

Released by the Department of Finance
under the Freedom of Information Act 1982

Question 2	
Question	Would it be possible to receive an offline version of the webform for MAS?
Answer	The entire questionnaire can be downloaded from the 360 Public Portal by clicking "Full Questionnaire (for response planning purposes)" in the Request Overview.

Question 3	
Question	Will unsuccessful Service Subcategory submissions affect eligibility for other Service Subcategories in the MAS tender response?
Answer	Each Service Subcategory will be evaluated independently, and Respondents may be found successful or unsuccessful in each one, without affecting the others.

Question 4	
Question	Can you confirm that STR is necessary, but the ABN is not?
Answer	Finance confirms that a Respondent does not need an ABN to tender for FIN/MASR2-RFT. All Respondents, including foreign entities, must comply with and submit STRs under the Shadow Economy Procurement Connected Policy in accordance with the requirements outlined in the RFT.

Question 5	
Question	One of the examples of work we would like to include was completed for a large private Trust/large not-for-profit, does this classify as a corporate entity under your requirements?
Answer	Finance would classify a large private trust or not-for-profit organisation as an 'other' organisation. Please note that examples from any type of entity can be used throughout the response, and (for example) a large private trust is a large entity which would be considered an equivalent to Australian Government, other government and/or large corporate entity.

Question 6	
Question	Section 3 of the Questionnaire refers to the requirement that a Respondent must "be a legal entity recognised under Australian law." Could you please confirm whether this means that a Respondent must be registered in Australia, or whether it is sufficient to be a legally incorporated entity in another jurisdiction that can enter into contracts under Australian law?
Answer	All Respondents must be registered as a legal entity, and that must be recognised by Australian law. This does not mean that a Respondent must be registered in Australia. A legal entity in a foreign country which can enter contracts under Australian law would fit the criteria set out in Section 3 of the 360 Public Portal questionnaire and the Conditions for Participation set out in section 8.1.4 of the RFT.

Released by the Department of Finance
under the Freedom of Information Act 1982

Question 7	
Question	Are any specific sectoral experience (e.g. experience in energy or infrastructure-related advisory services) preferred within the Service Subcategories listed?
Answer	Experience in different sectors will not be considered differently against the evaluation criteria (section 11.4.2 of the RFT).

Question 8	
Question	Do services have to have been provided in Australia to qualify for MAS Refresh 2?
Answer	Finance confirms that examples of work do not need to have been delivered in Australia, and services delivered internationally will be considered. These will not be considered differently against the evaluation criteria (section 11.4.2 of the RFT).

Question 9	
Question	Can the same project example and/or referee be used to support more than one Service Subcategory, provided that it is clearly tailored to the requirements of each?
Answer	There is no restriction on how many times an example/referee can be nominated throughout the Response. Each Service Subcategory is evaluated separately by an independent TET, and details from other sections of the Response will not be considered by the TET.

-- End of Addendum --

Released by the Department of Finance
under the Freedom of Information Act 1982

Australian Government

Department of Finance

ADDENDUM NUMBER 8 – FIN/MASR2-RFT

MANAGEMENT ADVISORY SERVICES FOR THE AUSTRALIAN GOVERNMENT REFRESH PHASE 2 – CORPORATE AND COMMERCIAL MANAGEMENT ADVISORY SERVICES AND INVESTMENT BANKING SERVICES

Date of Issue for this Addendum: 27 May 2025

This Addendum is issued in accordance with paragraphs 5.2 and 6.2 of the Request for Tender (RFT).

This Addendum 8 provides:

- Extension to the Closing Time by 3 weeks to **2:00 pm Tuesday 24 June 2025**.
- Responses to questions raised by potential Respondents.

Amendments to RFT documentation

Question that the change relates to	Reference	Previous Wording	New Wording
N/A	Table on Page 1 of the RFT	Enquiry Cut-off Date 5:00 pm Tuesday 20 May 2025	Enquiry Cut-off Date 5:00 pm Tuesday 10 June 2025
		Last Addenda Release Date 5:00 pm Tuesday 27 May 2025	Last Addenda Release Date 5:00 pm Tuesday 17 June 2025
		Closing Time 2:00 pm Tuesday 3 June 2025	Closing Time **2:00 pm Tuesday 24 June 2025**

RFT questions and responses

Question 1	
Question	How many Service Subcategories can Respondents apply for?
Answer	Respondents may choose which of the 21 Service Subcategories they would like to submit a response for by completing the 'Offered Services' Question in the 360 Public Portal. There is no limit on the number of Service Subcategories a Respondent can tender for.

Question 2	
Question	The request document 'Attachment B - Scope of Services' has several occurrences of text highlighted in yellow. We would like to know if there is a particular reason for this or if these formatting differences are to be ignored.
Answer	As stated on Page 1 of Attachment B – Scope of Services: *Yellow highlighted content reflects updates to the scope of services following consideration of consultation feedback. These are the new Corporate and Commercial Management Advisory Services referred to at paragraph 3.1.3(c) of the RFT that Respondents may tender for.*

Question 3	
Question	Our referees for FIN/MASR2-RFT will be the same as out referees for FIN/PP03/23Phase3. Are we required to repeat the entire Referee Endorsement process for FIN/MASR2-RFT or will you accept the existing details/outcomes from FIN/PP03/23Phase3?
Answer	The People Panel Phase 3 RFT (FIN/PP03/23Phase3) and MAS Panel Refresh 2 RFT (FIN/MASR2-RFT) are two separate and independent procurement processes. Therefore, separate Referee Endorsements are required when responding to the MAS Panel Refresh 2 RFT.

Question 4	
Question	Can Finance provide further clarification on who is considered personnel beyond the definition given in the Head Agreement (Attachment C: 1.1)? For example, are employees on non-ongoing, full-time contracts considered personnel?
Answer	Service Provider's Personnel are defined in the Head Agreement as any natural person who is a partner, officer, employee or other personnel (including Key Personnel) of the Service Provider or of a Subcontractor (and, in the case of clauses 16.10, 20.1, 22 and 24 only, an agent or professional adviser of the Service Provider). Therefore, all employees of the Respondent are considered personnel, including non-ongoing employees.

Question 5	
Question	We are currently approved service providers under the existing MAS panel. We would like to apply for additional subcategories, however, our rate cards have since increased. Would Finance require that we follow the same panel rates from our existing MAS panel, or are we allowed to propose different rates?
Answer	Respondents to MAS Refresh 2 (FIN/MASR2-RFT) may submit Fees which do not align with their current MAS Head Agreement. Please note that as stated in paragraph 7.3.1 of the RFT, Finance does not intend to conduct negotiations. The Respondent is encouraged to submit its best offer in the first instance.

Released by the Department of Finance
under the Freedom of Information Act 1982

Question 6	
Question	Are project examples of consulting projects where there was no financial consideration given (i.e. pro-bono work) considered appropriate for this Panel?
Answer	Finance will assess examples of demonstrated experience provided by Respondents based on the evaluation criteria set out in section 11.4.2 on pages 41-2 of the RFT: (a) the extent to which the Respondent demonstrates its capability and capacity to provide the Offered Services to the Australian Government; and (b) the extent to which the Respondent demonstrates its organisational experience, or where organisational experience cannot be provided, its personnel's experience, within the last 5 years providing the Offered Services to the Australian Government, other governments and/or large corporate organisations, which will take into account: (i) the examples provided by the Respondent to demonstrate its organisational experience, or where organisational experience cannot be provided, examples to demonstrate its personnel's experience, and how the experience relates to the definition of Management Advisory Services; and (ii) the Referee Endorsements submitted for the Respondent and/or its personnel and the extent to which these Referee Endorsements support the Respondent's or its personnel's claimed experience. Finance will not disregard any example on the sole basis that it was pro-bono or unpaid work.

Question 7	
Question	Do Respondents need to provide information on data systems and security for this RFT?
Answer	Finance can confirm that no responses on data systems or security are required in the 360 Public Portal questionnaire.

Question 8	
Question	We note that Question 9 in Section 5 asks 'Is the Respondent a 'relevant employer' under the Workplace Gender Equality Act 2012 (Cth)?' Subsequently, if the response is 'YES', question 10 asks the Respondent to acknowledge that we will either attach the current letter of compliance at the time of submission or provide prior to execution if successful. We only became a relevant employer in this recent reporting period (1 April 2024 to 31 March 2025). As WGEA only issues compliance letters between September and October, we are concerned on the MAS Panel timing to provide the letter. However, we are a 'relevant employer' under the Act. Can you please advise how to answer these questions under our circumstances? Thank you.
Answer	The registration letter you receive from the Workplace Gender Equality Agency upon registering as a relevant employer should state the following: Your organisation is required to submit a report to the Agency for the first time between 1 April and 31 May XXXX and annually thereafter. If you are tendering for a government contract, this letter serves as your letter of compliance until the acceptance of your first report or 1 July XXXX, whichever is earlier. If you have this document, you can submit this in place of a compliance letter in Section 5 Question 10. Alternatively, Respondents are permitted to submit their compliance letter prior to execution of a Head Agreement if successful. If you wish to do this please select 'No' in response to

	Section 5 Question 10, noting that you confirm the Respondent will provide a letter of compliance from the Workplace Gender Equality Agency prior to execution of the Head Agreement or Deed of Variation, if selected as a Successful Respondent.

Question 9	
Question	What is the submission date for this RFT?
Answer	In accordance with the amendment on page 1 of this Addendum, Finance confirms that the Closing Time for FIN/MASR2-RFT is 2:00 pm (Canberra local time) on **Tuesday 24 June 2025**.

Question 10	
Question	Can Finance provide guidance on which Service Categories Respondents should apply for?
Answer	The Department of Finance is not well positioned to advise Respondents which Service Subcategory/ies, if any, they should tender for. Service Descriptors as contained in Attachment B – Scope of Services have been drafted in a deliberately broad manner. This is to ensure that Commonwealth Entities have access to the widest possible range of capable and cost-effective advisory service providers through the panel arrangement. It is solely up to Respondents to determine which, if any, Service Subcategory their service offerings are best aligned.

Question 11	
Question	The issue relates to question 5 (then subsequently question 6 or question 7) in the 360 Public Portal questionnaire for any of the subcategory sections 10-30. These questions allow for up-to-500 words on the organisation's relevant engagements/experience (question 6) or up-to 500 words on personnel's relevant engagements/experience which includes work in previous organisations (question 7). In this situation, can Respondents pick Question 6 or 7 and provide relevant content for both, clearly marked? That is, provide no more than 500 words in total while including both organisational experience and personnel experience outside the organisation?
Answer	Respondents will be assessed against the evaluation criteria requirements of the RFT, as set out in section 11.4.2 on pages 41-2. Due to the high volume of anticipated Respondents to the RFT, it is Finance's expectation that Respondents will answer the questionnaire to the best of their ability and not deviate from the questions asked. However, Finance would not discount a Respondent on the sole basis that it provides both organisational and personnel experience for any sections 10-30, questions 6-7. Ultimately it is up to Respondents to consider and assess their own ability to be able to satisfy the evaluation criteria requirements of the RFT.

Question 12	
Question	Could you please confirm whether it is possible to trigger referee notifications to be sent prior to the Closing Time?

Released by the Department of Finance
under the Freedom of Information Act 1982

Answer	Referee notifications will not be triggered before the Closing Time. Referees can expect to be contacted between the 25th of June to the 9th of July 2025.

Question 13	
Question	For the purpose of meeting the requirements of the tender response, in addition to providing the STR for the partnership, do Respondents need to: 1. Provide a valid and satisfactory STR for each Partner who is directly involved in the delivery of the Services; and 2. If so, if the relevant Partner is a trust, please confirm the STR for the trust would be sufficient (specifically, we don't need it for the trustee, any others, etc)
Answer	As stated in section 11.4.4(c) of the RFT: *A Respondent must submit with its Tender all Valid and Satisfactory STR(s) required for the Respondent's entity type that is Valid and Satisfactory at the Closing Time.* This means that, for a partnership, all Valid and Satisfactory STR(s) of Partners involved in delivery of the Services must be submitted. If the relevant partner/entity is a trust, then the trustee must also provide a STR to comply with the Shadow Economy Policy. Respondents should refer Attachment H (Guidance on the Shadow Economy Procurement Connected Policy) of the MASR2 Request for Tender to ensure compliance with the policy.

Question 14	
Question	The Department of Finances' MAS search tool shows that the panel includes the following categories that are not on the current refresh. - Financial Advisory - Technical Finance - Financial Assessments - Budgets - Accounting - Financial and Economic Analysis What is the reasoning for excluding these categories from the current refresh? When will these categories/subcategories be added for a subsequent refresh tender?
Answer	MAS Refresh 2 (FIN/MASR2-RFT) is for the Corporate and Commercial Service Areas, and the Investment Banking Services Service Subcategory of the MAS Panel. The Financial Service Area was included in MAS Refresh 1 and is out-of-scope for MAS Refresh 2. Finance does not currently have plans to approach the market again to refresh the Financial Service Area under the MAS Panel.

Question 15	
Question	Regarding the submission requirement for Valid and Satisfactory STR(s), as a Partnership is it sufficient to provide an STR for the Partnership (entity type) only at the tender submission

	stage? Or are we also required to provide an STR for our representative Partner, and any Partners who will be delivering the services?
Answer	As stated in section 11.4.4(c) of the RFT: *[A Respondent must] submit with its Tender all Valid and Satisfactory STR(s) required for the Respondent's entity type that is Valid and Satisfactory at the Closing Time.* This means that, for a partnership, all Valid and Satisfactory STR(s) of Partners involved in delivery of the Services must be submitted. Please also note that, as per section 11.4.5 of the RFT: *If a Respondent does not submit all Valid and Satisfactory STR(s) that satisfy the requirements set out above, subject to paragraph 9.7, the Respondent's Tender will be excluded from further consideration.*

Question 16	
Question	What is expected to be included in the "note to referee and note to evaluator section" when entering referee's information? Also if there are no applicable notes to be made do we just put "N/A"?
Answer	The "note to referee" function can be used to specify which piece of work the Respondent is asking the referee to confirm. These notes will be shown to the referee prior to them completing their Referee Endorsement. The "note to evaluator" function can be used to let the evaluation team know that a referee has since moved on from their position, or to specify the position the referee held during the piece of work. There is no requirement to provide either a note to referee or note to evaluator when completing this section of the 360 Public Portal questionnaire. If no note to referee or note to evaluator is required by the Respondent, this section can be left blank, or "N/A" can be written.

Question 17	
Question	Can you please confirm the meaning of 'value' when it is used for the responses to each category? See the wording below: A brief description of up to 5 Business Strategy and Improvement advisory engagements undertaken by the organisation in the last 5 years, including; o the client; o timeframe; o value; and o relevant advisory services provided. Does value mean the $ value or the value added for the client through the engagement?
Answer	In this question in the 360 Public Portal, "value" refers to the approximate dollar value (AUD) of the services provided.

Question 18	
Question	Are broad timeframes such as "2021-2025" (regular ad hoc support) or "2021" sufficient or do you need more specific timeframes for example, "January to August 2021"?
Answer	It is Finance's preference that more specific timeframes are provided (e.g. Jan 2023 – Mar 2024), however broader timeframes will also be acceptable for evaluation purposes.

Released by the Department of Finance
under the Freedom of Information Act 1982

Question 19	
Question	What kind of insurance do Respondents need to hold to participate in MAS Refresh 2?
Answer	There are no insurance requirements for responding to FIN/MASR2-RFT. Successful Respondents will be required to hold insurance as stated in clause 18.1 of Attachment C – Head Agreement.

Question 20	
Question	Section 9.1.2 of the RFT suggests Respondents should ensure that they adhere to any word/character limits stated in the Tender Response Questionnaire. It is also stated that the Department reserves the right to not consider any information in exceedance of any word limit. Further, section 5 of Attachment F suggests respondents should 'use the scope' allowed by the word limits provided in 360 Public Portal. The 360 Portal states word limits for some questions (in some cases 500 or 700 words) in text adjacent to response fields, however the individual response fields in the online form allow applicants to enter in more (apparently unlimited) amounts of text/words. Given this, can the Department please provide more definitive guidance on how applicants should manage the issue of response length to individual questions in the portal.
Answer	Finance confirms that Respondents should adhere to the word limits stated in the 360 Public Portal Questionnaire. Where a question has a word limit of 500 words, it is suggested that Respondents provide close to (but not more than) 500 words, as it is an indication of the level of detail required. Any information that exceeds the stated word limits will not be considered by Finance.

Question 21	
Question	Can referees be employed by a Commonwealth Entity that will potentially procure services via the MAS panel (e.g. NIAA, DFAT, DCCEEW)?
Answer	Yes, referees can provide Endorsements if they are employed by a Commonwealth Entity. The only requirement for referees to be able to provide an Endorsement for FIN/MASR2 - RFT is that the referee can attest firsthand to work completed as detailed in a Respondent's experience example.

Question 22	
Question	Can Finance confirm where Respondents should note how many FTE they have skilled in each sub-category, and if the FTE must be Australia Citizens?
Answer	In the 360 Public Portal, Question 2 of any Section 10-31 asks: *How many full-time equivalent (FTE) personnel (not including subcontractors) are in your organisation with the relevant skills and experience to provide advisory services in the [relevant] Service Subcategory?* There is no requirement for these FTE to be Australian Citizens.

Released by the Department of Finance
under the Freedom of Information Act 1982

Question 23	
Question	How should Respondents complete the reference section of the 360 Public Portal if the sole relevant referee for a detailed case study is not able to act as a referee (e.g. is not able to be contacted)?
Answer	As stated in clause 8.3.1 on page 16 of the Request for Tender, Referee Endorsements are required to be submitted to support the Respondent's or its personnel's claimed experience. In this context, we ask that the Respondent provides an alternate case study example to demonstrate their capability and experience that can be independently verified by a contactable referee.

Question 24	
Question	Can Finance provide clarity on the distinction between contract work and consultancy/advisory services?
Answer	The scope of Management Advisory (consultancy) Services can be found in section 1.2 of the RFT. For the purposes of FIN/MASR2-RFT, Management Advisory Services are defined as: *"the provision of professional, independent advice, and other strategic services that involve the development of an intellectual output which represents the independent view of the Service Provider and assists with entity decision- making."* Management Advisory Services must meet the consultancy characteristics as per Resource Management Guide No 423: Procurement Publishing and Reporting Obligations.

Question 25	
Question	We are seeking feedback on how to meet the requirement for demonstrated experience as a recently incorporated organisation. Based on the response to Q6 of addendum 5, our interpretation is that we would need to focus on personnel experience as opposed to organisational expertise in our response. If that is correct, is there a requirement for those personnel to be employed directly by the Respondent, or it is acceptable that those personnel are employees of partners who have been identified for future secondments to the Respondent to support project delivery?
Answer	In the instance where the Respondent has not done any relevant work under its current ABN, it is expected that the Respondent will put forward experience of its personnel. Service Provider's Personnel are defined in the Head Agreement as any natural person who is a partner, officer, employee or other personnel (including Key Personnel) of the Service Provider or of a Subcontractor (and, in the case of clauses 16.10, 20.1, 22 and 24 only, an agent or professional adviser of the Service Provider). Therefore, individuals who have been identified for future secondments to the Respondent to support project delivery would not be considered personnel for FIN/MASR2-RFT.

Question 26	
Question	Can we confirm that there are no IPP requirements for this panel submission?
Answer	Finance confirms there are no IPP requirements to submit a response to FIN/MASR2-RFT.

Released by the Department of Finance
under the Freedom of Information Act 1982

Question 27	
Question	After reviewing the response form on the 360 platform, we cannot find the area where Respondents are required to provide their referee contact details. Could you please advise?
Answer	Referee contact details are required in Question 17 or 18 and 28 or 29 in Sections 10-31. Please note that all previous questions must be answered before confirming referee details.

Question 28	
Question	Our Statement of Tax Record states *"This entity is a trust. The trustee will also need to provide a statement of tax record to satisfy the Procurement Connected Policy"* however our trustee company doesn't have or is required to have a TFN, so we're unable to get information of it from the ATO. Would it be sufficient to provide a letter from our accountant stating that our trustee is a non-trading trustee company or is there any other information/documents we could provide to prove we are unable to provide a STR for the trustee?
Answer	Finance confirms that to satisfy the Shadow Economy Procurement Connected Policy, all Valid and Satisfactory STR's for the Respondent's entity type are required. Finance does not have discretion under this policy to accept anything in lieu of an STR. Please contact the ATO in the first instance to discuss what needs to be done to obtain an STR for the trustee company.

Question 29	
Question	Our company provides X type of services – can you please confirm that these are relevant under X Service Subcategory?
Answer	It is up to each interested party to determine which service categories, if any, they will submit a tender to provide. Please note that the MAS Panel is for commonly used consultancy services, and all contractor, recruitment and labour hire services are out of scope of FIN/MASR2-RFT as per section 1.3 of the RFT.

Question 30	
Question	We are having issues with our login/MFA/accounts in the 360 Public Portal.
Answer	Unfortunately, Finance is unable to assist with this issue in the 360 Public Portal. You can contact 360 Tech Support to assist you, their contact details are below: • Email: support@simplylogical.net • Telephone: 02 5100 4009

Released by the Department of Finance
under the Freedom of Information Act 1982

Question 31	
Question	We note that Section 5, Question 21 in the 360 Public Portal questionnaire asks whether the ABN provided on the STR matches the ABN of the respondent. Please could you confirm if this is only relevant to the STR for the partnership, or whether the individual partners' STRs also need to include our firm's ABN?
Answer	Finance confirms that only the Respondent's STR must match the ABN of the Respondent, and that partners' STRs do not need to include the Respondent's ABN.

Question 32	
Question	Can Finance provide a definition of 'training' please. Specifically, does training include coaching, workshops and other capability uplift?
Answer	Finance confirms that training includes delivery of coaching, workshops, and other programs in relation to capability uplift. Training is out of scope of the MAS Panel.

Question 33	
Question	Can Finance confirm the email address that will be used to send the referee endorsement email? We understand the 360 Public Portal will be used but would like to provide the exact email address to avoid risks of emails landing in the spam folder.
Answer	Referees will receive a notification from the 360 Public Portal after the Closing Time (via an email link provided from DoNotReply@sl360.au) and asked to complete a short questionnaire.

Question 34	
Question	Could you please confirm how much time referees have to complete the endorsement (e.g. 14 days)?
Answer	Please ensure that your referees will be available to provide a Referee Endorsement from the 25th of June to the 9th of July 2025. Referees will be expected to complete their endorsements in the timeframe stated above (i.e. 14 days).

Question 35	
Question	We are having issues obtaining an STR. Can you please help?
Answer	Unfortunately, Finance has no discretion to exempt a Respondent from the STR requirements of the Shadow Economy Procurement Connected Policy. Finance is also unable to discuss your organisation and issues with the ATO due to privacy constraints. We encourage you to work with the ATO to try and resolve this and ensure you have the necessary STR documentation prior to the Closing Time. Linked below is some further information on the Shadow Economy Procurement Connected Policy that may assist you, noting each webpage has contact details you can reach out to:

	Shadow Economy Procurement Connected Policy – Increasing the integrity of government procurement | Treasury.gov.au Procurement Connected Policies | Department of Finance Statement of tax record | Australian Taxation Office

Question 36	
Question	Our managing director/company director has recently changed their first name and is planning to have it legally changed but hasn't yet completed this process. In our application, does their name need to match the name of the personnel that the business name is currently registered under or can we use the new name and note in our application that it has been changed?
Answer	If the process of name change has not been completed, please use the current name during tender submission. Any changes (e.g. legal name changes) can be notified in writing to the request manager (MASRefresh@finance.gov.au) during the tender period once they occur.

Question 37	
Question	Under a Service Subcategory, can Finance confirm if the service descriptors relate specifically to the capability of the Service Subcategory versus a broader interpretation (for example Communication Strategies and Stakeholder Engagement specific to organisational change versus Communication Strategies and Stakeholder Engagement more broadly)?
Answer	Finance confirms that the Service Descriptors under a Service Subcategory are intended to relate to the Service Subcategory itself. Examples provided by the Respondent must demonstrate Service Descriptors in relation to the Service Subcategory to be considered relevant. Broader examples of 'Stakeholder Engagement' for example, would not be considered relevant if they do not align with the Service Subcategory tendered for.

Question 38	
Question	Can a Respondent tender for MAS Refresh 2 if it doesn't have any financial information?
Answer	Financial information is not required to participate in FIN/MASR2-RFT, however the Respondent would still be required to provide a valid and satisfactory STR as per section 10.6 and 11.4 of the RFT.

Question 39	
Question	Can a Respondent tender for MAS Refresh 2 if it has only recently commenced operations and has no previous case studies yet?
Answer	In the 360 Public Portal, Respondents can demonstrate the experience of their personnel in lieu of organisational experience, noting the evaluation criteria in section 11.4.2 of the RFT.

Question 40	
Question	When the system sends out referee endorsement requests to our nominated referees, could a copy of that request also be sent to the referee's personal assistant? If this is possible, where should we provide the additional email address?
Answer	Only one set of contact details (per referee) are able to be contacted through the referee function in 360. If your nominated referee is unable or unlikely to be contactable through their primary email address, you can include this information and their personal assistant's details in the "note to evaluator" section in any referee nomination question.

Question 41	
Question	In the Excel format of the Questionnaire Schedule retrieved from the 360 Public Portal, Respondents are asked to provide up to five advisory engagement examples per service category. However, in the online portal, we are prompted to respond to the following question instead: "Does the Respondent have one or more adequate examples to include in this Response to demonstrate its organisational experience over the last 5 years?" (700-word limit) Can Finance confirm if Respondents are expected to provide one or two detailed examples within the 700-word limit per service category as per the question sequence in the portal? And should Respondents disregard the Excel instruction to provide up to five examples of advisory engagement along with detailed description of up to two engagements?
Answer	Regarding any Section 10-30: Question 5 asks the Respondent if they have one or more adequate examples to include in the response to demonstrate organisational experience in the last five years. This is a drop-down yes or no question. If "yes" is selected, the Respondent will be asked to provide the number of relevant engagements the organisation has provided, and a brief description of up to five of these engagements (within a 500-word limit). If "no" is selected, the Respondent will be asked to provide the number of relevant engagements their current personnel have provided, and a brief description of up to five of these engagements (within a 500-word limit). Then, as you go through the questionnaire in the 360 Public Portal, questions 8-29 will guide you through two detailed examples, each with a 700-word limit for a detailed description of work.

Question 42	
Question	Can Finance please clarify the difference between the terms 'fees' and 'rate'? For example, please clarify the difference between question 30 (provide your fees) and question 33 (proposed maximum hourly rate for expert personnel) for each subcategory?
Answer	'Fee' refers to the maximum proposed hourly rate for the Respondent's personnel. Refer to Schedule 2, 3 and 4 of Attachment C – Head Agreement of FIN/MASR2-RFT

Question 43	
Question	With regard to Question 6 for each Service Subcategory, can Finance clarify if the word limit is 500 in total or 500 words per engagement?
Answer	The word limit is 500 words for the entire response to Question 6.

Question 44	
Question	Regarding Questionnaire section 3 Conditions for Participation – it appears that Q1 missing. Can Finance confirm this issue?
Answer	This issue has been resolved. Finance confirms there is only 1 question (Question 1) in Section 3.

Question 45	
Question	Regarding Question 17 and 18, and Question 28 and 29, for each Service Subcategory appear to be duplicated. Is that correct?
Answer	The Respondent will be required to answer Question 17 (not Question 18) if they have selected "Organisational experience" in response to Question 8. The Respondent will be required to answer Question 18 (not Question 17) if they have selected "Personnel experience" in response to Question 8. The Respondent will be required to answer Question 28 (not Question 29) if they have selected "Organisational experience" in response to Question 8. The Respondent will be required to answer Question 29 (not Question 28) if they have selected "Personnel experience" in response to Question 8.

Question 46	
Question	Can Finance clarify the intended meaning of "third party" in clause 20.3.1 of the Head Agreement? Can Finance confirm whether "third party" is intended to mean any party other than the Entity, or only those parties that are not part of the Commonwealth government?
Answer	An Order will be between two legal entities – the service provider and the Entity receiving the goods or services. If that Entity agrees to such a restriction, then use by third parties (i.e. separate legal entities of any type) may be restricted. This is a matter for the procuring Entity and the service provider to agree on. Where the Entity is the Commonwealth of Australia, then any other Entity that also represents the Commonwealth will not be a 'third party' for the purposes of cl 20.3.1 of the Head Agreement, because they form part of the same legal entity. Please note Respondents should seek their own legal advice on the interpretation of the Head Agreement.

Question 47	
Question	With reference to Section 10-30, Question 6, could the Department clarify whether the "number of engagements" refers only to unique client engagements, or whether multiple distinct engagements delivered to the same client may be counted separately?

Released by the Department of Finance
under the Freedom of Information Act 1982

Answer	Finance confirms that the 'number of engagements' refers to discrete projects/packages of work delivered (i.e. under different work orders or contracts), rather than the number of unique clients.

Question 48	
Question	If a firm was to be successful in being added to the MAS Panel, what are the key performance and accountability mechanisms that will be adopted?
Answer	Please note the Performance Management Framework and Service Levels in Schedule 7 of Attachment C to the RFT, which is applicable to all MAS Panellists.

Question 49	
Question	If the services provided were not consultancy services (i.e. if a Respondent's personnel provided the services for the Commonwealth government whilst still employed by a government department) will the example provided still be valid for the purposes of the application?
Answer	Please note that all Respondents will be assessed against the evaluation criteria set out in section 11.4.2 of the RFT: *(a) the extent to which the Respondent demonstrates its capability and capacity to provide the Offered Services to the Australian Government; and* *(b) the extent to which the Respondent demonstrates its organisational experience, or where organisational experience cannot be provided, its personnel's experience, within the last 5 years providing the Offered Services to the Australian Government, other governments and/or large corporate organisations, which will take into account:* *(i) the examples provided by the Respondent to demonstrate its organisational experience, or where organisational experience cannot be provided, examples to demonstrate its personnel's experience, and how the experience relates to the definition of Management Advisory Services; and* *(ii) the Referee Endorsements submitted for the Respondent and/or its personnel and the extent to which these Referee Endorsements support the Respondent's or its personnel's claimed experience.* For clarity, 'Offered Services' must meet the definition of Management Advisory Services in section 1.2.2 of the RFT. Therefore, the Respondent must demonstrate capability, capacity and experience providing Management Advisory (consultancy) Services to be considered for appointment to the MAS Panel.

Question 50	
Question	Would a firm qualify as an SME if it has under 200 employees in Australia, but over 200 overseas?
Answer	An SME is defined in the CPRs as an Australian or New Zealand firm with fewer than 200 full-time equivalent employees (FTEs). When assessing the number of employees a firm has, employees of any associated entities (as defined in s 50AAA of the Corporations Act 2001) to the firm are included. Associated entities to a firm include a firm's parent company, a firm's subsidiaries, and any related bodies corporate to the firm.

Released by the Department of Finance
under the Freedom of Information Act 1982

	If the total organisation (including parent company, subsidiaries and or related bodies corporate to the firm) is over 200 FTEs, the Respondent would not be considered an SME.

Question 51	
Question	Definition of "Agency" in the Head Agreement: we note that there are a number of references to "Agencies" in the Head Agreement (but no corresponding definition). Could you please clarify what this is referring to?
Answer	The definition of 'Agency' is: *(a) the following entities, organisations or persons authorised by Finance to obtain Services from the Service Provider under this Head Agreement:* *(i) a Non-corporate Commonwealth Entity;* *(ii) a corporate Commonwealth entity as defined by the PGPA Act; and* *(b) any other government entities authorised by Finance and advised in writing to the Service Provider from time to time.* *To avoid doubt, a reference to an Agency does not include Finance unless Finance issues an Order to the Service Provider.* The term 'Agency' has been replaced with 'Entity' throughout the documentation, (as stated in Attachment D - Head Agreement Amendments), and these terms are used interchangeably throughout the RFT.

Question 52	
Question	Will Respondents be penalised during the evaluation process if they provide examples or case studies with entities that are not Australian Government or State/Territory Government entities?
Answer	Respondents will not be penalised for providing examples in which the client organisation is not a large corporate, Australian Government, or other government entity, as long as the example demonstrates a similar complexity and scale of what would be expected from these entities.

Question 53	
Question	Is there a maximum number of providers that will be accepted onto the panel or will all agencies that meet the panel requirements be accepted onto the panel?
Answer	There is no maximum number of providers that can be accepted onto the MAS Panel. All Respondents who are assessed as being suitable for inclusion on the MAS Panel will be recommended to the Delegate for appointment on the MAS Panel.

Question 54	
Question	How will the 360 Public Portal handle multiple submissions for the same referee? Specifically, if a referee is listed across multiple Service Subcategories, will they receive a separate survey for each submission?
Answer	Each referee nomination is treated independently by the 360 Public Portal and will result in a separate Referee Endorsement for the nominated person to complete. For example, if the

Released by the Department of Finance
under the Freedom of Information Act 1982

	Respondent uses the same referee for one example across 5 different Service Subcategories, the referee will need to complete 5 separate Referee Endorsements.

Question 55	
Question	We have been advised that due to NSW Government policy, they are unable to provide either written or verbal references for service providers, nor act as a referee for service providers. They are only able to issue a formal statement of service. What should we do?
Answer	If the Respondent is able to use a different example of demonstrated experience (not for NSW Government) with a contactable referee, this would be preferred in the first instance. If this is not an option, please provide relevant contact details for a referee, and provide context in the 'note to evaluator' section of the referee nomination that the referee is from NSW Government and therefore unable to provide a reference. Finance will take this into consideration when assessing Responses, as it is a policy decision by NSW Government and should not reflect poorly on the Respondent.

- End of Addendum --

Released by the Department of Finance
under the Freedom of Information Act 1982

Australian Government

Department of Finance

ADDENDUM NUMBER 9 – FIN/MASR2-RFT

MANAGEMENT ADVISORY SERVICES FOR THE AUSTRALIAN GOVERNMENT REFRESH PHASE 2 – CORPORATE AND COMMERCIAL MANAGEMENT ADVISORY SERVICES AND INVESTMENT BANKING SERVICES

Date of Issue for this Addendum: 11 June 2025

This Addendum is issued in accordance with paragraphs 5.2 and 6.2 of the Request for Tender (RFT).

This Addendum 9 provides:

- a reminder of the extension of the Closing Time to **2:00 pm Tuesday 24 June 2025**; and
- responses to questions raised by potential Respondents.

Reminder – Closing Time

Finance would like to remind potential Respondents that, as per Addendum 9, the Closing Time has been extended to **2:00 pm Tuesday 24 June 2025**.

Respondents must ensure their **STRs are still valid** at the new Closing Time, **and do not expire before 24 June 2025.**

Respondents must ensure their **referees are available** to provide Referee Endorsements between **25th of June to the 9th of July 2025.**

RFT questions and responses

Question 1	
Question	Could Finance confirm if the requirement to upload a digital signature in 'Section 32, Question 5' will be satisfied by uploading a wet signed and scanned version of the 'Attachment J - Respondent's Declaration Information'?
Answer	Finance confirms that this would meet the requirements for Section 32 Question 5.

Question 2	
Question	Can Respondents nominate a referee if they reside overseas or work for an international organisation?
Answer	Finance confirms that international referees will be accepted for the purposes of FIN/MASR2-RFT.

Released by the Department of Finance
under the Freedom of Information Act 1982

Question 3	
Question	Can Finance confirm if Respondents are required to name personnel that undertook the work in each of the 2 case study examples in the subcategory responses?
Answer	The Respondent is only required to provide names of relevant personnel if they chose to nominate an example of personnel experience in lieu or organisational experience. If the Respondent choses 'organisational experience' in response to question 8 or 19, they will not be asked to provide the names of their relevant personnel.

Question 4	
Question	May Respondent's nominate a group inbox for its referee contact details?
Answer	Respondents may nominate a group inbox for the email of a referee. However, it is expected that the Referee Endorsement is completed by an individual, and the referee will be asked their name, position, organisation, phone number, email address, and any conflicts of interest through the 360 Public Portal.

Question 5	
Question	Can Finance confirm that an application for a new Service Subcategory, successful or not, does not exclude an existing MAS Panellist from remaining on its current Service subcategories under the MAS Panel?
Answer	Finance confirms that application for an additional Service Subcategory (whether successful or unsuccessful) will not affect any MAS Panellists current approved Service Subcategories under their Head Agreement.

Question 6	
Question	How can Respondents edit a response if it has already been submitted?
Answer	Please refer to section 4.6 of Attachment E - 360 Public Portal Respondent's User Guide for instructions on how to reopen a response.

Question 7	
Question	Can Finance confirm if the referee endorsement requests will be sent on the 25th of June and referees will have until 9th of July to complete?
Answer	Finance confirms that the Referee Endorsement requests will be sent between 24-27 June 2025, and referees will have 14 days to complete their responses.

Released by the Department of Finance
under the Freedom of Information Act 1982

Question 8	
Question	How will the Expert Personnel be evaluated as part of the overall evaluation?
Answer	Please refer to section 11.5.2 in the RFT which states: *In assessing if each Respondent's Fees contributes to a value for money outcome for a Service Subcategory, the Tender Evaluation Team will undertake a comparative analysis of Respondents' Fees, and may:* *(a) apply a deviation of 10 per cent on the average of the Fees tendered for each Service Subcategory. This identifies the Fees that are within a 10 per cent range below and above the mean, and those Fees that are more than 10 per cent below or more than 10 per cent above the mean for each Service Subcategory;* *(b)* ***consider the number of proposed FTE in the nominated Service Subcategory that are Expert Personnel (if any) in comparison to the total number of FTE and how this may impact on Fees****;* *(c) consider any relevant data submitted in relation to the non-financial evaluation criteria, that may impact on fees; and* *(d) undertake benchmarking against the current MAS Panel fees for all Service Subcategories.*

Question 9	
Question	Do Respondents need to notify the use of subcontractors somewhere in its response?
Answer	There is no requirement to notify the use of subcontractors when responding to FIN/MASR2-RFT. However, all examples of demonstrated experience using subcontractors should be clearly identified in response to the 360 Public Portal questionnaire.

Question 10	
Question	Regarding Q2 in any section 10-30. "How many full-time equivalent (FTE) personnel (not including subcontractors) are in your organisation with the relevant skills and experience to provide advisory services in the Business Strategy and Improvement Service Subcategory?" Should Respondents simply provide a number to answer this question or should they provide detail explaining its employee's related skills and experience?
Answer	In response to question 2 in any section 10-30 it is expected that the Respondent only provides the **number** of (FTE) personnel (not including subcontractors) in its organisation with the relevant skills and experience to provide advisory services in the relevant Service Subcategory.

Released by the Department of Finance
under the Freedom of Information Act 1982

Question 11	
Question	What does Finance expect in terms of rates for the MAS Panel? Will Respondents be excluded if its pricing is too high?
Answer	There is no expected maximum pricing under the MAS Panel. In Finance's Value for Money Assessment of a Respondent, the following factors (not just pricing) will be considered: (a) the Respondent's assessment from Stage 2 and Stage 3 of the Evaluation Process, which includes an assessment of risk; (b) the results of any further pricing offer; (c) the results of any Verification Activities (if relevant); (d) the level of each Respondent's compliance with Commonwealth legislation and policies; (e) the level of compliance with the Head Agreement (including with the requirement to comply with the Supplier Code of Conduct), noting that it is the intent of Finance to maintain the same terms across all Service Providers; (f) the environmental sustainability of the Offered Services; (g) economic benefits to the Australian economy; (h) the extent to which the Respondent and its Tender complies with, and meets, the requirements of this RFT; (i) in addition to those risks identified in the Stage 2 and Stage 3 Evaluation Process, any other risks to Finance or Entities that the Tender Evaluation Team identifies; (j) the extent to which the Respondent has demonstrated they have policies and processes in place to comply with the Supplier Code of Conduct; (k) any other matter that Finance or the Tender Evaluation Team considers relevant and allowed to be considered under this RFT; and (l) the broader Australian government or WoAG panel objectives. Please note that Finance is able to call for a further pricing offer on any aspect of a Tender either from Respondents or Preferred Respondents (section 9.18(e) of the RFT), if it is deemed that pricing is uncompetitive.

-- End of Addendum --

Released by the Department of Finance
under the Freedom of Information Act 1982

(Notification) issued at 2.15pm 26/11/2025 with evaluation update

Dear Tenderers,

The purpose of this email is to provide you with an update on the current *Management Advisory Services Refresh 2* tender.

Evaluation teams are presently undertaking a comprehensive assessment of all submissions received for *Management Advisory Services Refresh 2 – Corporate / Commercial and Investment Banking*, which encompasses 21 subcategories.

As the establishment and refresh of Whole of Australian Government panels attract a significant volume of tender responses, the evaluation process is necessarily extensive and time-consuming.

Finance will provide regular updates on the progress of the evaluation through the 360 portal and via email. Please note that all tenderers will be formally notified of the outcome of their submissions at the earliest opportunity.

We appreciate your patience and continued engagement throughout this process.

Kind regards,

MAS Team

Released by the Department of Finance
under the Freedom of Information Act 1982

(Notification) issued at 25 March 2026 with evaluation update

Dear Tenderers,

The purpose of this email is to provide a further update on the Management Advisory Services Refresh 2 tender.

Evaluation teams continue to undertake a comprehensive assessment of all submissions received for Management Advisory Services Refresh 2 – Corporate / Commercial and Investment Banking, covering 21 subcategories. As Whole of Australian Government panel processes attract a substantial volume of responses, the evaluation remains detailed and time intensive.

Finance will continue to provide updates on the progress of the evaluation through the 360 portal and via email. All tenderers will be formally advised of the outcome of their submissions at the earliest opportunity.

We appreciate your ongoing patience and engagement throughout this process.

Kind regards,

MAS Team