Instructions are in green text. Remove when done.

Type answers/ information required over text in red.

***This template (Direct Source or Closed Tender Recommendation Report) is to be used for direct source or closed tender procurements only. For open tenders, please use the Open Tender Recommendation Report.***

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| --- | --- |
| **Direct Source or Closed Tender Recommendation Report**  **(for School-led Procurement)** | |
| **Procurement Title** | [Name of School] (the School) – [Project title] – [Nature of Engagement] |
| **The Requirement** | [Brief description of the requirement] See the Procurement Plan for more information. *Add approved Procurement Plan as appendix.* |
| **Reference No.** | [Reference number, if available] |
| **Procurement Process** | [Procurement process (e.g. Direct Source, Closed Tender] |
| **Procurement Dates** | Date published: [Date]  Deadline for tenders: [Date]  Final evaluation meeting: [Date]  [Commentary as to whether timeline set out in Procurement Plan was met and if not, why not] |
| **Preferred Tenderer(s)** | [Preferred/ Shortlisted Tenderer Name(s)]  [NZ Business Number] *Check* [*https://www.nzbn.govt.nz/*](https://www.nzbn.govt.nz/)  [Company Number] *Check* [*https://companies-register.companiesoffice.govt.nz/*](https://companies-register.companiesoffice.govt.nz/) |
| **Price** | |  |  | | --- | --- | | **Preferred Tenderers Price** | **$XX** | | Contingency (X%) | $XX | | **Total Procurement Value** | **$XX** | |
| **Comments** | [Detail:   * summary of the rationale for the selection of the preferred Tenderer * any further due diligence required * any material changes to the contract/requirement from that described in the Procurement Plan * any final negotiations required * expected contract signing date * contract start date * issues, risks or concerns arising as a result of the evaluation   any other relevant information] |
| **Evaluation Process** | *[The evaluation was conducted in accordance with the evaluation plan detailed in the procurement plan]*  *[OR]*  *[The evaluation varied from the evaluation plan detailed in the procurement plan as follows:*   * *[detail of variation]]* |
| **Evaluation Summary** | Summarise the evaluation of tenders including:   * [xx] tenders were received by the deadline * note the circumstances and treatment of any late tenders (accepted or excluded and rationale) * note the circumstances any tenders excluded from evaluation following the initial review of tenders for compliance with Rfx terms and conditions * Evaluation:   + list the tenders that were determined to meet the requirement and detail the rationale   + list the tenders that were determined do not meet the requirement and detail the rationale   + Price analysis   + Final tenderer ranking * due diligence conducted including findings and outcome   ranking, short-listing and selection of preferred (including rationale) |
| **Conflicts of Interest** | *Select:* No conflicts of interest were declared/ reported.  *or* [List all conflicts of interest declared/reported and detail how they were managed.]  It is confirmed that the outcome of the evaluation was not influenced by any conflict of interest. |
| **Procurement Roles** | |  |  | | --- | --- | | **Role** | **Name** | | Recommended by Evaluation Panel Chair | [Evaluation Panel Chair Signature]  [Name] [Date] | | Endorsed by Procurement Owner | [Procurement Owner Signature]  [Name] [Date] | | Endorsed by Procurement Leader | [Name] [Date] (Ministry Property Advisor)  (no less than two business days prior to approval)] | | Approved by Procurement Sponsor | [Procurement Sponsor Signature]  [Name] [Date] | |
| **Attachments** | * Evaluation Workbook * Post-Tender Clarifications Table for preferred supplier (If any)   [Others, e.g. full QS Report] |