Instructions are in green text. Remove when done.

Type answers/ information required over text in red.

|  |  |
| --- | --- |
| **Open 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.* |
| **Report Purpose** | *Select:* Recommendation to shortlist from an ROI.  or Recommendation to appoint a preferred tenderer. |
| **Reference No.** | [Reference number, if available] |
| **Procurement Process** | [Procurement process (e.g. open RFT / ROI / Closed RFT following ROI)] |
| **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** *(delete section if shortlisting from an ROI)* | *For Professional Services:*   |  |  | | --- | --- | | Masterplanning | $XX | | Preliminary/Concept Design | $XX | | Developed Design | $XX | | Detailed Design | $XX | | Procurement | $XX | | Construction Observation | $XX | | Defects Liability Period | $XX | | Provisional Sums | $XX | | Expenses/Disbursements | $XX | | **Total Contract Price** | **$XX** | | Contingency (X%) | $XX | | **Total Procurement Value** | **$XX** |   Provisional Sums detailed below:   * [Detail Provisional Sums]   Expenses/Disbursements detailed below:   * [Detail any expenses and disbursements]   *For Construction Services:*   |  |  | | --- | --- | | Contract Works  (Exclusive of Provisional Sums) | $XX | | Provisional Sums | $XX | | Preliminaries & General (P&G) – Onsite Overheads | $XX | | Margin – Offsite Overheads and Profit | $XX | | **Total Contract Price** | **$XX** | | Contingency (X%) | $XX | | **Total Procurement Value** | **$XX** |   Provisional Sums detailed below:   * [Detail Provisional Sums]   Rates for Valuing Variations:  Onsite Overhead Percentage: X%  Offside Overhead and Profit Percentage: X%  Working Day Rate: $X |
| **Engagement Risks/ Issues/ Concerns** | [Material changes to the contract/requirement from that described in the Procurement Plan]  [Issues, risks, or concerns arising from the evaluation]  [Risks/issues/concerns relating to contracting with preferred Tenderer including mitigation/treatment if applicable] |
| **Next Steps** | Expected contract signing date: [Date]  Contract start date: [Date]  Contract end date: [Date]  Possession of site date (on-site start date): [Date]  Practical completion date (based on current programme): [Date] |
| **Tenders Received** | Tenders were received from:  [Name of tenderer 1]  [Name of tenderer 2]  Initial review  *Select:* The tenders were initially reviewed for compliance with Rfx terms and conditions and deemed compliant, with no tenders excluded from the evaluation.  *or* The tenders were initially reviewed for compliance with Rfx terms and conditions and tenders from [Supplier Name] and [Supplier Name] were deemed compliant, with the tender from [Supplier Name] deemed non-compliant and excluded from evaluation due to [reasons]. |
| **Evaluation Process** | *Select:* 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]   **Stage 1: Non-Price Evaluation** *(For Closed Tenders: Please include details for all suppliers below, covering each of your evaluation criteria at minimum. For Open Tenders: Please include details for the top 3 scoring tenders, and append the evaluation workbook to this report.)*  *Use the following* ***for weighted attribute****. Delete if conformance and (best) value.*  [Supplier A] ranked 1st for non-price:   * [Briefly 1-3 summarise strengths of proposal] * [Briefly 1-3 summarise weaknesses of proposal]   [Supplier B] ranked 2nd for non-price.   * [Briefly 1-3 summarise strengths of proposal] * [Briefly 1-3 summarise weaknesses of proposal]   [Supplier C] ranked 3rd for non-price.   * [Briefly 1-3 summarise strengths of proposal] * [Briefly 1-3 summarise weaknesses of proposal]   *Select:* All suppliers were deemed conforming.  *or* [Supplier name] was deemed non-confirming and the final non-price ranking is as shown:  The Evaluation Team agreed on the final non-price scores and the pricing was revealed for all. *Add exceptions, if required.*  **Stage 2: Price Evaluation**  The pricing analysis was conducted by [Name, Organisation].  *Select:* Initial adjustments to enable a like for like comparison included [xxx] and were presented to the Evaluation Team as shown:  *or* No adjustments were required to evaluate the submitted prices.  It was noted that [add comment about potential implications of tags submitted as required].  [Add findings / concerns raised]  [Screenshots/ Comments from QS Report welcome]  On this basis, all prices were deemed conforming. *Add exceptions, if required.*  **Stage 3: Outcome from the Moderation**  The Evaluation Panel recommended the following:  *Select:* [Supplier name] is the preferred Tenderer and the Principal should enter into contract negotiations with them.  *or* [Supplier name] is the preferred Tenderer at this stage, but given the scores are close, the Principal should enter into contract negotiations with [Supplier name], [Supplier 2 name] and [Supplier 3 name].  If 2nd ranked Tenderer (and even 3rd) has a score that is close to the 1st ranked Tenderer but you don’t close out tags with them (noting you should close out tags if there’s any chance that closing out those tags would result in a change of who the preferred supplier is), then you need to detail the rationale behind your decision making. An example has been provided below for your reference.  *Build Limited was ranked 2nd. They scored 6% lower than the supplier ranked first, and their price was $78k more expensive. The Evaluation Panel discussed whether to recommend negotiating tags with Build Limited as well. To assist in this decision, the Evaluation Chair showed the tender tags of both suppliers to the Evaluation Panel.*  *The Evaluation Panel decided to not recommend closing out tags with Build Limited because there was no chance the tag-closure could result in a change to who the preferred Tenderer was, and this was supported by the Price Analyst. The reasons for this are:*   * *There were 12 tags of the first-ranked supplier, and the worst-case scenario would have resulted in an increased tender price of $50k.* * *There were no tags for Build Limited, so their tender price would not have changed.* * *If the pricing for the first-ranked supplier increased by $50k, the evaluation weightings mean they would still be the preferred Tenderer following tag-closure.*   Note any additional non-price benefit and/ or reduction of risk. |
| **Negotiation Outcome** | Post Tender Clarifications (PTCs) took place from [date] to [date].  These mostly covered [summarise items] and were successfully closed. *Add exceptions, if required.*  While there were no changes to any of the tender rankings, there were some minor pricing adjustments made which accounted for a $X increase/ decrease to [Supplier Name/s]’s response and resulted in the below final scores. *Document scoring/ ranking changes if required and note any due diligence conducted and its outcome.*  The Post-Negotiation Outcome has been shared with the Evaluation Panel who are in agreement to recommend [Supplier Name] as the preferred Tenderer because [provide reasons, e.g. they have the highest total score and their price represents value for money]. |
| **Further Negotiation Items/Reserved Rights** | [List of further negotiation items] *Including contract and commercial, technical/design items.*  [Stages to be negotiated at a future point] *Stages to be negotiated must follow appropriate approval process.*  [Reserved Rights created by this tender] |
| **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. |
| **Contract** | [Short Form Agreement/ CCS/ Minor Works/ Medium Works/ Major Works] |
| **Additional Contract Details** *Delete row if not specifying in contract.* | Key Trades:   * [key trade] – [legal entity name] * [key trade] – [legal entity name]   Key Personnel   * [role] – [personnel name]   *These should be consistent with the Procurement Plan and the Tenderer’s Proposal/ any negotiations.* |
| **Accepted Tags**  *Delete row if no tags.* | *Select:* No Tags.  *or* Tags that were closed out with the preferred Tenderer(s) are detailed in an appendix below. |
| **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** | * Post-Tender Clarifications Table for preferred supplier * Evaluation Workbook   [Others, e.g. full QS Report] |