Instructions are in green text. Remove when done.

Type answers/ information required over text in red.

Tenderers must type their responses over text in orange.

Guidance for Use: Contract Works Request for Quote

(RFQ) Template

*This template (RFQ Lite) is for the direct source procurement of Professional Services or Contract Works with a value of $10,000 - $99,999. If conducting a closed tender, please use the RFQ template.*

The Minor Works Contract or SFA is to be used with this template

In this template, the buyer is the School Board and is referred to as “the Principal” which is the legal entity that enters into a contract (not to be confused with the “school principal”).

Contractors that submit a quote or are invited to submit a quote are referred to as “Tenderers”.

When identifying the name of the school in the Procurement title, follow this with (the School). The specified school may then be referred to as “the School” throughout the RFQ.

**Content in the RFQ must be consistent with the relevant approved Procurement Plan.**

Prior to publication:

1. delete all unused optional content
2. ensure all instructional texts have been removed, including this guidance for use page
3. save a separate Word document version of the Quote Response Form
4. save the whole RFQ lite document as a PDF document (file name: [Procurement Title] [Name of School] (the School) – [Project Title] – [Nature of Contract Works] RFQ)
5. when inviting quotes, send both the RFQ (pdf) and Quote Response Form (Word document) to Tenderers (this allows the Tenderer to populate Word document).

NOTE: Delete this page and all instructional texts throughout the document before submitting this document for endorsement/ approval/ publication.

|  |  |
| --- | --- |
| **Request for Quote - Lite** | |
| **Procurement Title** | [Name of the School] - [Project Title] - [Works/Services required] |
| **Point of Contact** | Name: [Procurement Officer name]  Role: Procurement Officer  Email address: [Procurement Officer’s email address] |
| **The Supplier** | *Add supplier name* |
| **The Requirement** | [Description of the requirement including:   * Background and context * Description of works/services * Deliverables * Timeframes * Key Roles requiring named personnel (including applicable qualification/skills/expertise) * General requirements (e.g. access arrangements)]   The Supplier will be engaged through a Minor Works/SFA Contract (attached). No tags will be accepted.  The Supplier must comply with the Health and Safety at Work Act 2015 and any subsequent amendments and the Ministry’s Health and Safety requirements at [Property projects: contractor health and safety](http://www.education.govt.nz/property-contractor-health-and-safety/) including immediately notifying the Buyer of any asbestos discovery, accident, incident or near miss.  Tenderer’s personnel who are to visit the school must consent to being police vetted if required (a review by the School Board of a person’s criminal conviction information held by the New Zealand Police Licensing and Vetting Service Centre). An adverse police vet may result in the vetted person being refused access to the School. |
| **RFQ terms and conditions** | This RFQ is subject to the terms and conditions at [Opportunities for construction suppliers - Ministry of Education](https://www.education.govt.nz/suppliers-and-providers/procurement/procurement-goods-and-services/opportunities-construction-suppliers" \l "terms-and-conditions-1) or: go to [www.education.govt.nz](http://www.education.govt.nz) and search “School property procurement templates and guides”.  The Quote will be evaluated for conformance with the requirement and value for money. |
| **RFQ Issued** | [date] |
| **Deadline for Quote** | Please submit your quote by [time/date] to [email address] |

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| --- | --- |
| **Quote Response Form** | |
| **Tenderer name** | [Tenderer’s trading name] |
| **Full Legal Name *(if different than Tenderer name)*** | [Insert] |
| **NZBN** | [Insert] |
| **Company Number** | [Insert] |
| **Contact person** | [Name] |
| **Title/position** | [Title/position] |
| **Telephone no.** | [Telephone number] |
| **Email address** | [email address] |
| **Authorised Contract Signatory *(if different than contact person)*** | [Name]  [Title/position] [email address] |
| **Proposed Solution** | [Description of your proposed solution to fully meet the requirement including:  [list aspects of the proposed solution that you require the Tenderer to describe (e.g. named personnel for Key Roles) and change highlighting to blue] |
| **Fixed Lump Sum Price** | **$**[xx] (NZ$ exclusive of GST) for the full delivery of the Requirement which includes all costs, fees, expenses, charges and adequate provision to manage all risks, contingencies and other relevant circumstances. |
| **Price Breakdown** | [Detailed breakdown of price components and rates that comprise the quoted fixed lump sum price] |
| **Assumptions and qualifications** | [State all assumptions and qualifications made in preparing your Quote, including for pricing information and/or where the Buyer or a third party may incur cost related to the delivery of the Requirement] |
| **Conflict of Interest** | *Either*  I am not aware of any:   * circumstance that may represent an actual, potential or perceived Conflict of Interest between my organisation’s and/or sub-consultants’/sub-contractors’ interests (including Key Personnel) and the duties/responsibilities in delivering the Contract Works; and * Ministry personnel, including contractors, having any interest in, or association with me and/or my sub-consultants’/sub-contractors’ that may give rise to any perceived, potential or actual Conflicts of Interest.   *or*  [Provide details of anything that may give rise to any perceived, potential or actual Conflicts of Interest.] |
| **Tenderer’s Declaration** | I declare that in submitting the Quote:   1. the information provided in this quote is true, accurate complete and does not contain Intellectual Property that will breach a third party’s rights 2. I am authorised to make this declaration and submit this quote on behalf of the Tenderer.   Signature:  Full name:  Title/position: Date: |
| **Email address** | [email address] |

[Append draft/template Contract]