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| **TENDER CHECKLIST- T042022** | X:\Forms, Manuals & Policies\Corporate Branding\Logos\Logo-colour_without tagline_Portrait.jpg | |
| The following checklist is to be completed as part of coordinating a Public Tender  on behalf of the Shire of Harvey  *(Checklist drafted in accordance with Local Government (Functions and General (F&G)) Regulations 1996 Part 4 Provision of goods and services\* and*  *Shire of Harvey Council Policy 2.2.11 Purchasing Policy)* | | |
| 1. **COMPLETION OF TENDER COVERSHEET (Prior to Advertising)** | | |
| **Tender Checklist (F&G 17 (1), (2),(3))** to be accessed from  [X:\Procurement\Tenders\1.Documentation & Templates\2020 Final Tender Checklist.docx](file:///X:\Executive\EMCS\Tenders\Tenders%202020\2020%20Final%20Tender%20Checklist.docx) | |  |
| Tender number and Description of Tender | |  |
| Complete “Section 1. Description of Tender” in Tender Register **(F&G 14)** | |  |
| Complete “Section 2. Authorisation to Tender” in Tender Register **(Delegation 2.2.11)** | |  |
| a) Allocation within the budget amount and Account number | |  |
| b) Tender specification approval and date (correct details of item(s)/service(s) sought **(F&G14 (4) (b))** | |  |
| c) Selection Criteria approval and date, providing details for evaluation of the tender **(F&G14 (4) (c))** | |  |
| Complete “Section 3. Advertising Details and Dates” in Tender Coversheet **(F&G 13, 14 and 17)** | |  |
| a) Include copies of advertisements in Tender Coversheet | |  |
| b) Indicate if tenders are sought via: | |  |
| i. Public Tender, | |  |
| ii. EQuotes WALGA | |  |
| Complete “Closing date and time” in Tender Coversheet **(F&G 15)** | |  |
| 1. **TENDER ADVERTISEMENT** | | |
| Tender number is included | |  |
| Brief description of the goods or services sought *(i.e. the description of the service required, location of the service)* **(F&G 14 (3) (a))** | |  |
| Particulars identifying a person from whom additional tender information may be obtained **(F&G 14 (3)(b))** | |  |
| Include information as to where and how tenders may be submitted  *(*i.e. Instructions to be given that tender must be lodged via Tenderlink by the closing date (F&G 14 (3) (c)) and that details of the Tender and Specifications are available by registering with Tenderlink at www.tenderlink.com/ShireofHarvey  Include an endorsement that postal, emailed or facsimile submissions will not be accepted | |  |
| State wide public notice given on all tenders **(F&G 14(1))**  Advertisements **MUST** be placed in the West Australian newspaper | |  |
| Include a date and time after which tender cannot be submitted, closing time and date **(F&G 14 (3) (d))**  *(The time after which tender cannot be submitted (closing date) has to be at least fourteen (14) days after the notice is first published in the West Australian* ***(F&G 15(1))***  *Closing day should be a Thursday.*  *(Additional advertisements can be placed in the local media)*  Include: Canvassing of Councillors will automatically disqualify a tenderer. | |  |
| Advertising is not to occur until the Tender Specification is signed by the CEO, inclusive of the selection criteria and weightings to apply | |  |
| Inform Marketing and Communications Officer of project and advertising period for placement on Shire website. | |  |
| Download Tender via Tenderlink. | |  |
| 1. **POST ADVERTISING** | | |
| Downloading of submitted tenders from Tenderlink on Tender Closing Date and closing time **(F&G 16, 17)** | |  |
| Complete “Section 4. Tenders Received” in Tender Coversheet **(F&G 16, 17),** *(Name and Address of Tenderer, Date and time of tender opening and initials of officers present).*  Include Details of Tenderers in Attendance at the Opening of Tenders *(Name of representative and company name)*, **(F&G 16)** | |  |
| Complete “Certification” in Tender Coversheet **(F&G 16).**  *(Tender opening date and time – two officials to complete this section – One Senior Staff member* ***MUST*** *be present)* | |  |
| Remove advertisement from website | |  |
| Review tender documents received from service providers | |  |
| 1. **SELECTION PROCESS** | | |
| Establish Selection Panel | |  |
| Complete audit of compliance criteria | |  |
| Determine Meeting date with Selection Panel to finalise scoring of Selection Criteria according to matrix | |  |
| Finalise recommendation by selection panel | |  |
| **SELECTION PROCESS (*cont.*)** | | |
| Prepare Council Item for recommendation of preferred bidder/service provider | |  |
| Obtain Council resolution to accept quotation of preferred tenderer/service provider | |  |
| Council authorisation to CEO and Shire President to sign and seal General Conditions of Contract between Shire and successful service provider | |  |
| Complete “Section 5. Council resolution and details of successful tender” *(Resolution Number, meeting date, successful tenderer)*in Tender Coversheet and attach a copy of the extract from the Council Meeting minutes **(F&G 18 (4))** | |  |
| 1. **APPOINTMENT OF SERVICE PROVIDER** | | |
| Notification in writing by the CEO to the successful tenderer, unsuccessful tenderers containing particulars of the successful tender, or advising that no tender was accepted **(F&G 19 and 18(5))** | |  |
| Obtain acceptance of offer by successful service provider | |  |
| Prepare Contract Agreement to be signed by both parties | |  |
| Complete Tender Coversheet *(Section 5. Of Tender Coversheet, column – ‘Detail of successful Tender’)*  **Note: ‘The Tender Coversheet is to include *Only* the amount for the successful tenderer after Tender has been accepted by the service provider (Do not include amount submitted by other tenderers), (F&G17(3))** | |  |
| Tender Process Completed, Recording of Tender documents and filing of all required information placed in Tender File | |  |
| **DOCUMENTS TO BE INCLUDED IN THE TENDER FILE** | | |
| a. Printed advertisement of “Notice for request for Tender’ sent to newspaper publisher or publishing | |  |
| b. Newspaper clipping to be scanned and included in the Tender Coversheet. | |  |
| c. Full page extract of the newspaper (s) (name, page and date), to reflect published advertisement | |  |
| d. Extract of Council Minutes with Resolution | |  |
| e. Completed Tender Coversheet | |  |
| f. Completed Tender Checklist | |  |
| g. Copy of the Tender document | |  |
| h. Copy of Specifications (if applicable) | |  |
| 1. Copy of Tender Register showing Tender *(to include hyperlinks to Tender Coversheet, Council Item Minutes, Request for Tender Document (Brief) and Tender received from successful Tenderer)*. | |  |

**\*** "*Tenders have to be publically invited according to the requirements before a local government enters into a contract for another person to supply goods and services if the consideration under the contract is, or is expected to be, more, or worth more, than $150 000 unless subregulation (2) states otherwise*" - Functions and General 11(1) Regulations 1996.

**Declaration**

The Tender Checklist and Tender Coversheet as outlined in the above have been completed and the Tender Procedure has been adhered to:

Signed (Official or Senior Manager) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Signed (CGR) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_