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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 Tenderon 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)**
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| **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%3A%5CExecutive%5CEMCS%5CTenders%5CTenders%202020%5C2020%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**
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| 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/ShireofHarveyInclude 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**
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| 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**
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| 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)*.
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**\*** "*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\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_