

# TENDER CHECKLIST- T092022



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)

√ X N/A

Tender Checklist (F&G 17 (1), (2),(3)) to be accessed from X:\Procurement\Tenders\1.Documentation & Templates\2020 Final Tender Checklist.docx	<input checked="" type="checkbox"/>
Tender number and Description of Tender	<input checked="" type="checkbox"/>
Complete "Section 1. Description of Tender" in Tender Register (F&G 14)	<input checked="" type="checkbox"/>
Complete "Section 2. Authorisation to Tender" in Tender Register (Delegation 2.2.11)	<input checked="" type="checkbox"/>
a) Allocation within the budget amount and Account number	<input checked="" type="checkbox"/>
b) Tender specification approval and date (correct details of item(s)/service(s) sought (F&G14 (4) (b))	<input checked="" type="checkbox"/>
c) Selection Criteria approval and date, providing details for evaluation of the tender (F&G14 (4) (c))	<input checked="" type="checkbox"/>
Complete "Section 3. Advertising Details and Dates" in Tender Coversheet (F&G 13, 14 and 17)	<input checked="" type="checkbox"/>
a) Include copies of advertisements in Tender Coversheet	<input checked="" type="checkbox"/>
b) Indicate if tenders are sought via:	<input checked="" type="checkbox"/>
i. Public Tender,	<input checked="" type="checkbox"/>
ii. EQuotes WALGA	<input checked="" type="checkbox"/>
Complete "Closing date and time" in Tender Coversheet (F&G 15)	<input checked="" type="checkbox"/>

## 2. TENDER ADVERTISEMENT

Tender number is included	<input checked="" type="checkbox"/>
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))	<input checked="" type="checkbox"/>
Particulars identifying a person from whom additional tender information may be obtained (F&G 14 (3)(b))	<input checked="" type="checkbox"/>
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	<input checked="" type="checkbox"/>
Include an endorsement that postal, emailed or facsimile submissions will not be accepted	<input checked="" type="checkbox"/>
State wide public notice given on all tenders (F&G 14(1))	<input checked="" type="checkbox"/>
Advertisements <b>MUST</b> be placed in the West Australian newspaper	<input checked="" type="checkbox"/>
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))	<input checked="" type="checkbox"/>
Closing day should be a Thursday.	<input checked="" type="checkbox"/>
(Additional advertisements can be placed in the local media)	<input checked="" type="checkbox"/>
Include: Canvassing of Councillors will automatically disqualify a tenderer.	<input checked="" type="checkbox"/>
Advertising is not to occur until the Tender Specification is signed by the CEO, inclusive of the selection criteria and weightings to apply	<input checked="" type="checkbox"/>
Inform Marketing and Communications Officer of project and advertising period for placement on Shire website.	<input checked="" type="checkbox"/>
Download Tender via Tenderlink.	<input checked="" type="checkbox"/>

## 3. POST ADVERTISING

Downloading of submitted tenders from Tenderlink on Tender Closing Date and closing time (F&G 16, 17)	<input checked="" type="checkbox"/>
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).	<input checked="" type="checkbox"/>
Include Details of Tenderers in Attendance at the Opening of Tenders (Name of representative and company name), (F&G 16)	<input checked="" type="checkbox"/>
Complete "Certification" in Tender Coversheet (F&G 16). (Tender opening date and time – two officials to complete this section – One Senior Staff member <b>MUST</b> be present)	<input checked="" type="checkbox"/>
Remove advertisement from website	<input checked="" type="checkbox"/>
Review tender documents received from service providers	<input checked="" type="checkbox"/>

4. SELECTION PROCESS	
Establish Selection Panel	<input type="checkbox"/>
Complete audit of compliance criteria	<input type="checkbox"/>
Determine Meeting date with Selection Panel to finalise scoring of Selection Criteria according to matrix	<input type="checkbox"/>
Finalise recommendation by selection panel	<input type="checkbox"/>
SELECTION PROCESS (cont)	
Prepare Council Item for recommendation of preferred bidder/service provider	<input type="checkbox"/>
Obtain Council resolution to accept quotation of preferred tenderer/service provider	<input type="checkbox"/>
Council authorisation to CEO and Shire President to sign and seal General Conditions of Contract between Shire and successful service provider	<input type="checkbox"/>
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))	<input type="checkbox"/>
5. 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))	<input type="checkbox"/>
Obtain acceptance of offer by successful service provider	<input type="checkbox"/>
Prepare Contract Agreement to be signed by both parties	<input type="checkbox"/>
Complete Tender Coversheet (Section 5. Of Tender Coversheet, column – 'Detail of successful Tender') Note: 'The Tender Coversheet is to include <b>Only</b> 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))	<input type="checkbox"/>
Tender Process Completed, Recording of Tender documents and filing of all required information placed in Tender File	<input type="checkbox"/>
DOCUMENTS TO BE INCLUDED IN THE TENDER FILE	
a. Printed advertisement of "Notice for request for Tender" sent to newspaper publisher or publishing	<input checked="" type="checkbox"/>
b. Newspaper clipping to be scanned and included in the Tender Coversheet.	<input checked="" type="checkbox"/>
c. Full page extract of the newspaper (s) (name, page and date), to reflect published advertisement	<input checked="" type="checkbox"/>
d. Extract of Council Minutes with Resolution	<input type="checkbox"/>
e. Completed Tender Coversheet	<input checked="" type="checkbox"/>
f. Completed Tender Checklist	<input checked="" type="checkbox"/>
g. Copy of the Tender document	<input checked="" type="checkbox"/>
h. Copy of Specifications (if applicable)	<input checked="" type="checkbox"/>
i. 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).	<input checked="" type="checkbox"/>

\* "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 2/2/2023

Signed (CGR)  Date 2/2/23