Part D – The offer

### (Example only – more complex procurement)

[This document is an example only and must be tailored to the requirements of your procurement.]

|  |  |
| --- | --- |
| Invitation title: | [Invitation title] |
| Reference number: | [Invitation reference number] |
| Offer submitted by: | [Invitee name] |

Instructions to Invitees for completing this offer template

1. All responses must be provided within the specified fields of Part D and must respond to the *Specification (Part A.2) and Proposed Contract (Part C)* in accordance with the *Conditions of Participation (Part B)* in the Invitation to supply.
2. Invitees must respond to all sections of this template and include their trading name, the Invitation Title and Reference Number in the footer of the template.
3. Where necessary, any graphics or data should be placed at the end of this template and referred to in the relevant field.
4. Invitees may provide supplementary material to support their offer. All supplementary material must be cross referenced to the relevant section of this template.

Table of contents

[Executive summary 4](#_Toc405995311)

[Compliance with Part A.2 – Specifications 4](#_Toc405995312)

[Methodology 4](#_Toc405995313)

[Capabilities 5](#_Toc405995314)

[External resources 5](#_Toc405995315)

[Customer service 5](#_Toc405995316)

[Quality system for deliverables 6](#_Toc405995317)

[Risk management 6](#_Toc405995318)

[Innovation and value adding 6](#_Toc405995319)

[Past performance and current work 6](#_Toc405995320)

[Social benefits 7](#_Toc405995321)

[Environmental management 7](#_Toc405995322)

[Financial capability 8](#_Toc405995323)

[Insurance 8](#_Toc405995324)

[Compliance with Part C – Proposed contract 9](#_Toc405995325)

[Conflict of Interest 9](#_Toc405995326)

[Pricing schedule 10](#_Toc405995327)

|  |  |  |
| --- | --- | --- |
| Invitee information |  | |
| Trading name: |  | |
| Registered name: |  | |
| Australian Company Number\*: \*or international equivalent | Date of issue: |  |
| Australian Business Number\*: \*or international equivalent | Date of issue: |  |
| Address of registered office: |  | |
| Principal office in Victoria (if applicable): |  | |

|  |  |  |
| --- | --- | --- |
| Contact details |  | |
| Name of contact person: |  | |
| Position title: |  | |
| Address: |  | |
| Postal address  (if different to above): |  | |
| Email: |  | |
| Website: |  | |
| Telephone number: | Mobile: |  |

The Invitee accepts the provisions contained in:

1. Section A – Part 1 – About this invitation; and
2. Part B – Conditions of participation,

and offers to [supply the goods/provide the services] in accordance with *Part A.2 – Specifications and Part C* *– Proposed Contract* included in the Invitation for the amount set out in this offer.

The Invitee warrants that they have full understanding of the requirements set out in the Invitation and that no actual or potential conflicts of interest in connection with this Invitation exist.

The Invitee warrants that they have checked any electronic files contained in their offer for viruses and that any and all offer files submitted are free from viruses. The Invitee undertakes to comply with any reasonable request of the Organisation for additional information to enable the Organisation to undertake a full assessment of the Invitee’s financial viability.

## Signed for and on behalf of the invitee

|  |  |
| --- | --- |
| Invitee: |  |
| Name: |  |
| Position: |  |
| Address: |  |
| Email: |  |
| Signature of Invitee’s authorised officer: |  |
| Date of signing: |  |

# Executive summary

Provide an overview of the offer.

|  |  |
| --- | --- |
|  |  |

# Compliance with Part A.2 – Specifications

### Option 1

If the offer complies with all requirements of *Part A.2 – Specifications*, the Invitee is to provide a statement affirming that they understand and comply with *Part A.2 – Specifications* in full.

Otherwise, the Invitee must provide a tabulated statement showing clearly and in order of the relevant clauses, where it ‘will not comply’ or ‘will comply subject to conditions’ with *Part A.2 – Specifications*. The Invitee must provide information relating to the reason for partial or non‑compliance.

### Option 2

[Procurement practitioners may wish to fill out the table below in order of the relevant sections to prompt a response from the Invitee.]

The Invitee must provide a compliance statement against each clause number stating either ‘comply’, ‘not comply’ or ‘will comply subject to conditions’.

The Invitee must provide information relating to the reason for partial or non‑compliance.

|  |  |  |
| --- | --- | --- |
| Section | Compliance statement | Explanation/comment |
|  |  |  |
|  |  |  |
|  |  |  |

### Alternative offer

Where an Invitee also submits an alternative offer, it must include any supplementary material which demonstrates how the alternative offer will fully achieve and/or exceed all the specified outputs or functional and performance requirements. Invitees should also detail why the additional features are beneficial and cross reference to the appropriate clause number in *Part A.2 – Specification*. [word limit – xx words]

|  |  |
| --- | --- |
|  |  |

# Methodology

Provide details of the methodology proposed to be used in the provision of the goods and/or services. Detail timelines, methodology, resources etc. [word limit – xx words]

|  |  |
| --- | --- |
|  |  |

# Capabilities

### Business structure

Attach a diagram of your business structure.

|  |  |
| --- | --- |
| [cross reference and attach at the end of the document] |  |

### Infrastructure and other support

Provide details of your business structure and the business units relevant to the delivery of the procurement. [word limit – [xx] words]

|  |  |
| --- | --- |
|  |  |

### Staff resources

Detail the experience and expertise of each key staff member and their role in the delivery of the procurement. [word limit – [xx] words]

|  |  |
| --- | --- |
|  |  |

# External resources

Provide details of external resources (other businesses/suppliers/sub‑contractors) to be engaged in connection with the provision of the procurement. Detail the relationship and the period of time in which the relationship has been established.

|  |  |  |
| --- | --- | --- |
| Business/supplier/sub‑contractor | |  |
| Name: |  | |
| Contact details: |  | |
| Scope and extent of  services to be provided: |  | |

# Customer service

### Customer Service Plan

Provide details of the Customer Service Plan you intend to implement for the provision of this procurement. Include methodology, timing of feedback and scope of reports. [word limit – [xx] words]

|  |  |
| --- | --- |
|  |  |

### Benchmarking

Provide details of what you consider to be appropriate performance measures and benchmarks. [word limit – [xx] words]

|  |  |
| --- | --- |
|  |  |

# Quality system for deliverables

Describe how you propose to monitor the quality of your performance under the Proposed Contract and whether you are accredited for any Quality Assurance certification.

|  |  |
| --- | --- |
|  |  |

# Risk management

Provide details of your project delivery risk management strategies and practices that would be applicable in the context of this procurement. [word limit – [xx] words]

|  |  |
| --- | --- |
|  |  |

# Innovation and value adding

Provide details of any innovative solutions, systems or processes that may add value to the delivery of the procurement outcomes. [word limit – [xx] words]

|  |  |
| --- | --- |
|  |  |

# Past performance and current work

Detail previous work, including work with the public sector (if any), related to meeting the requirements of this procurement. Also where applicable include the scope and value of the work undertaken. [word limit – [xx] words]

|  |  |
| --- | --- |
|  |  |

Detail current work related to the requirements detailed in *Part A.2 – Specification*. [word limit – [xx] words]

|  |  |
| --- | --- |
|  |  |

Provide three referees to support your ability to provide to the procurement. Note: The organisation reserves the right to contact any of the invitee’s previous customers. [Procurement practitioners may wish to ask referees about the Invitee’s ethical performance, including any prior instances of unethical conduct including breaches, investigations and remediation plans under the Supplier Code of Conduct or similar.]

| References |  |
| --- | --- |
| **Referee name 1:** |  |
| Contact details: |  |
| Description of services: |  |
| Time: |  |
| **Referee name 2:** |  |
| Contact details: |  |
| Description of services: |  |
| Time: |  |
| **Referee name 3:** |  |
| Contact details: |  |
| Description of services: |  |
| Time: |  |

# Social benefits

It is an objective of the Victorian government to facilitate the employment of disadvantaged community members through government procurement. Invitees are requested to address or demonstrate their commitment to undertaking work to create social benefit for local communities and disadvantaged community members. [word limit – [xx] words]

|  |  |
| --- | --- |
|  |  |

# Environmental management

All procurement has some level of impact on the environment. The level of impact should be minimised to ensure sustainable procurement practices. Detail the environmental management practices and processes of your organisation. [word limit – [xx] words]

|  |  |
| --- | --- |
|  |  |

# Financial capability

Invitees are required to demonstrate that they have the financial capability to provide, over the term of the contract, all the requirements specified in this Invitation to Supply. In the following table, the term ‘Invitee’ applies to the business itself, its parent or any associated entities or any director(s).

If the answer to any of the following questions is ‘yes’, provide an explanation.

|  |  |
| --- | --- |
| Are there any significant events, matters or circumstances which have arisen within the past 12 months that could significantly affect the operations of the Invitee? |  |
| Are there or have there been any:   * bankruptcy and/or de registration actions; or * insolvency proceedings (including voluntary administration, application to wind up, or other like action)   either actual or threatened, against the Invitee in the past three years? If so, what (if any) remedial action has been taken? |  |
| Is the Invitee currently in default of any agreement, contract, order or award that would or would be likely to adversely affect the financial capacity of the Invitee to meet the requirements of this Invitation to Supply? |  |
| Are there any other factors which could adversely impact on the financial ability of the Invitee to successfully perform the obligations contemplated by this Invitation? |  |

# Insurance

[delete the forms of insurance that are not applicable]

|  |  |  |  |
| --- | --- | --- | --- |
| Public liability |  |  | |
| Insurance company: |  | Policy number: |  |
| Amount $: |  | Expiry date: |  |
| Exclusions, deductibles: |  |  | |
| And/or excesses: |  |  | |

|  |  |  |  |
| --- | --- | --- | --- |
| Product liability |  |  | |
| Insurance company: |  | Policy number: |  |
| Amount $: |  | Expiry date: |  |
| Exclusions, deductibles: |  |  | |
| And/or excesses: |  |  | |

|  |  |  |  |
| --- | --- | --- | --- |
| Professional indemnity |  |  | |
| Insurance company: |  | Policy number: |  |
| Amount $: |  | Expiry date: |  |
| Exclusions, deductibles: |  |  | |
| And/or excesses: |  |  | |

|  |  |  |  |
| --- | --- | --- | --- |
| Work cover |  |  | |
| Insurance company: |  | Policy number: |  |
| Amount $: |  | Expiry date: |  |
| Exclusions, deductibles: |  |  | |
| And/or excesses: |  |  | |

# Compliance with Part C – Proposed contract

### Option 1

If the Invitee complies with all requirements of *Part C – Proposed contract*, the Invitee is to provide a statement affirming that they understand and comply with *Part C‑ Proposed contract* in full. Otherwise, the Invitee must provide a tabulated statement showing clearly, and in order of the relevant clauses, where it ‘will not comply’ or ‘will comply subject to conditions’ with *Part C – Proposed contract*.

### Option 2

[Procurement practitioners may wish to fill out the table below in order of the relevant sections to prompt a response from the Invitee.] The Invitee must provide a compliance statement against each clause number stating either ‘comply’, ‘not comply’ or ‘will comply subject to conditions’.

The Invitee must provide information relating to the reason for partial or non‑compliance.

|  |  |  |
| --- | --- | --- |
| Clause no. | Compliance statement | Explanation/comment |
|  |  |  |
|  |  |  |
|  |  |  |

# Conflict of Interest

Provide details of any actual or perceived interests, relationships or clients which may cause a conflict of interest and actions to prevent or manage the conflicts of interest.

|  |  |
| --- | --- |
|  |  |

# Optional question - Supplier Code of Conduct

### [Procurement practitioners may consider asking Invitees for details of previous unethical conduct]

Provide details on previous conduct of the Invitee that has not met the minimum standards set by the Supplier Code of Conduct or an obligation to a similar effect.

|  |  |
| --- | --- |
|  |  |

# Pricing schedule

[This section needs to be tailored according to the price structure required. The following tables are examples only.]

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Goods |  |  |  |  |  |
| Item no.: | Description | Qty | Rate  (excl. GST) | GST | Total |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Services |  |  |  |  |  |
| Milestone | Description | Units/hrs | Rate  (excl. GST) | GST | Total |
| Stage 1  [if required] |  |  |  |  |  |
| Stage 2  [if required] |  |  |  |  |  |
|  |  |  |  |  |  |

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Other expense |  |  |  |  |
| Item | Description of expense | Rate  (excl. GST) | GST | Total |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Price variation |  |  |  |  |  |
|  |  |  |  |  |  |

© State of Victoria 2018

[](http://creativecommons.org/licenses/by/3.0/au/)

This work is licensed under a [Creative Commons Attribution 4.0 Australia licence](http://creativecommons.org/licenses/by/3.0/au/). You are free to re‑use the work under that licence, on the condition that you credit the State of Victoria as author. The licence does not apply to any images, photographs or branding, including the Victorian Coat of Arms, the Victorian Government logo and the Department of Treasury and Finance logo.

Copyright queries may be directed to [IPpolicy@dtf.vic.gov.au](mailto:IPpolicy@dtf.vic.gov.au)