Template:

Local Council IT Procurement Policy, RFI & RFP Frame work

Summary

This template will focus on structuring a tender request to ensure that councils ask for the right things, ensuring fairness and transparency in the procurement process.

It also includes a simple Request for Proposal (RFP) and Request for Information (RFI) template structured in a table format. These templates are suitable for councils and organizations to solicit proposals or gather information from vendors about specific products or services.

1. Purpose

- **Objective:** Outline the goals of the procurement process, such as achieving value for money, promoting local economic development, or ensuring sustainability.
- **Scope:** Define what types of goods or services are included under this policy.

2. Legal and Regulatory Framework

- **Compliance:** List relevant laws that must be adhered to, such as any Local Government Act and any relevant trade agreements.
- **Council Requirements:** Detail any additional council-specific regulations or standards.

3. Principles of Procurement

- **Transparency:** Procedures must be clear and publicly accessible.
- **Fairness and Equity:** Ensuring all potential suppliers are treated equally without discrimination.
- **Efficiency and Effectiveness:** Procurement should be conducted in a timely and cost-effective manner.

4. Procurement Planning

- **Needs Assessment:** Describe the process for identifying the need for goods or services.
- **Market Research:** Guidelines on how to perform market research to understand available options and potential suppliers.

5. Tender Process

- **Announcement:** Guidelines on how to announce tenders, including channels and formats.
- **Tender Documentation:** Structure and content of tender documents, including:

    - **Statement of Work**: Detailed description of the goods or services required.
    - **Evaluation Criteria:** Specific criteria against which bids will be assessed.
    - **Conditions of Tender**: Terms under which the tender is offered, including timelines, submission process, etc.
    - **Bid Evaluation**: Steps to ensure an unbiased evaluation process, including forming an evaluation panel.
    - **Awarding the Contract**: Criteria for selecting the winner and the process for announcing the decision.

6. Contract Management

- **Contract Signing**: Procedures for finalizing terms and signing contracts.
- **Performance Monitoring**: Guidelines for monitoring the delivery and performance of the supplier.
- **Issue Resolution**: Procedures for managing disputes or issues arising during the contract period.

7. Review and Improvement

- **Policy Review**: Regular review and updating of the procurement policy.
- **Feedback Mechanism**: Methods for receiving feedback from stakeholders and incorporating improvements.

Implementing the Policy

- **Training**: Ensure that all personnel involved in procurement are trained on the policy and its applications.
- **Monitoring**: Regular audits and reports to check compliance with the policy and its effectiveness.
- **Technology Use**: Consider the implementation of procurement software to streamline the process and maintain records.

This template is designed to be adapted based on specific council needs and the legal requirements applicable to their location. Each council might have additional requirements or areas of focus, such as environmental considerations or a preference for local suppliers, which should be integrated into the customized policy.

Section	Details
1. Introduction	Brief introduction about the council/organization and the purpose of the RFI.
2. Information Sought	Describe the type of information needed from the vendors, including detailed questions or areas of interest.
3. Response Format	Specify the desired format for the responses (e.g., PDF, Word document) and any particular structure or headings to use.
4. Submission Guidelines	Provide guidelines on how to submit responses, including contact details and submission deadline.
5. Use of Information	Explain how the information will be used and how it will inform future actions or decisions.
6. Confidentiality	State any confidentiality considerations or requirements for handling the provided information.
7. Questions and Clarifications	Offer contact details for queries regarding the RFI and the process for seeking clarifications.

RFP (Request for Proposal) Template

Section	Details
1. Project Overview	Provide a brief description of the project, including objectives and expected outcomes.
2. Scope of Work	Detail the specific services or products required, project deliverables, and timelines.
3. Proposal Guidelines	Outline the format and content required in the proposal, submission deadline, and contact information.
4. Evaluation Criteria	List the criteria that will be used to evaluate the proposals, such as cost, technical expertise, and past performance.
5. Budget	State the budget for the project, including any flexibility or constraints.
6. Submission Details	Provide instructions for proposal submission, including format, number of copies, and submission method (e-mail, portal, etc.).
7. Terms and Conditions	Include any contractual terms and conditions that the proposer should be aware of.
8. Selection Timeline	Outline the timeline from proposal submission to final decision.

These templates can be customized to fit more specific requirements or constraints of the council or organization using them. They serve as a general guide to structuring requests for proposals and information efficiently.