

Request for Proposal (RFP)

1. Instructions for the Buyer

A Request for Proposal (RFP) is a formal request from an agency asking Respondents to propose how their goods or services or works can achieve a specific outcome and meet their budgets. The Buyer may be open to innovative ways of achieving the outcome. Use this template to help you outline the requirements and desired outcomes of the procurement.

A few terms to know. The 'Buyer' is the government agency using this RFP to procure goods or services. The 'Respondent' is the party submitting a Proposal in response to the RFP.

Everything in **RED** is information for the Buyer (that's you). Delete these **RED** parts throughout the document prior to publishing the RFP. Anything shaded in **YELLOW** is customisable. When you have completed these areas please un-shade them.

Delete this 'Instructions for the Buyer' page before releasing your RFP.

Before you release your RFP...

1. Write a procurement plan. ☐
2. Check that this is the right template for the procurement. ☐
3. Review the CUSTOMISABLE sections in this document (the areas shaded **YELLOW**). ☐

Important

Section 1: Do not change the names and sequence of sub-headings, or paragraph numbering.

Sections 2 to 5: Do not change the Section headings, but you can create your own sub-headings within each Section and change the content to suit your requirements.

4. Complete all sections in this document. ☐
5. Deleted all Buyer instructions and tips (**RED**). ☐
6. Unshaded the customised areas (**YELLOW**) by using the highlight pen icon. ☐
7. Delete this 'Instructions for the Buyer' page ☐



Request for Proposal (RFP)

by: AmRest Franchises

for: AmRest Franchises, Procurement Department

ref: 2023-4567847

RFP released: [15 01 2024]

Deadline for Questions: [12:00 15 02 2024]

Deadline for Proposals: [12:00 15 03 2024]

AmRest Franchises

<https://www.amrest-franquicias.com/en/la-tagliatella>

Paseo de la Castellana, 163, 6º

28046 - Madrid

The opportunity

This RFP is issued by AMREST TAG, S.L. (Single-Member Corporation), a subsidiary of the AmRest Holdings, SE group (www.amrest.eu), tax registration no. (CIF): B-86072139. Registered Office: Paseo de la Castellana, 163, 6th floor. Madrid – 28046 - (Madrid). Companies Registry of Madrid: Entry 1 of page number 28.196, sheet 141, section 8 and page number M-509.656

, referred to below as “the Buyer” or “we” or “us”.

This should be a short, concise summary to help Respondents decide if they are the right fit for the contract. Keep this summary to one page (or two pages maximum).

The problem of manual and inefficient processes in the management of franchisor businesses in the Italian restaurant sector affects various stakeholders involved in the franchise system. These stakeholders include franchisors, franchisees, restaurant staff, and customers.

The impact of this problem is evident in several aspects of the franchise operations. Firstly, the lack of streamlined management processes leads to inconsistent business practices across franchise locations, resulting in variations in food quality, customer service, and overall brand experience. This inconsistency not only affects the satisfaction of customers but also hinders the growth and expansion potential of the franchise system.

Furthermore, the absence of a centralized platform for communication, training, and support adversely affects franchisees. They face difficulties in accessing up-to-date information, training resources, and guidance from the franchisor. Consequently, franchisees struggle to maintain operational efficiency, comply with brand standards, and achieve optimal profitability.

In addition to these challenges, the reliance on manual record-keeping and reporting systems introduces inefficiencies and errors in financial management, inventory control, and performance analysis. These inefficiencies impede data-driven decision-making and hinder the ability of the franchisor to monitor and support franchisee performance effectively.

A successful solution to this problem would yield several key benefits. Firstly, it would establish standardized processes and practices across all franchise locations, ensuring consistent quality, service, and brand experience for customers. This would enhance customer satisfaction and loyalty, leading to increased revenue and profitability for both the franchisor and franchisees.

Secondly, a digitized system would provide a centralized platform for effective communication, training, and support. Franchisees would have access to up-to-date information, training materials, and guidance, empowering them to run their businesses more efficiently and effectively.

Thirdly, the system would enable streamlined financial management, inventory control, and performance analysis. This would improve operational efficiency, reduce errors, and provide valuable insights to the franchisor for making data-driven decisions, optimizing resources, and supporting franchisees in achieving their business goals.

Overall, a successful digitization solution for franchisor businesses in the Italian restaurant sector would enhance the competitiveness, scalability, and profitability of the franchise system while fostering a consistent and exceptional brand experience for customers.

What we need

Summarise what you are looking to procure in one or two paragraphs. Make it succinct. Avoid jargon and acronyms. You can include a little bit of background, if relevant.

[Example: Wholesome Life is a new initiative that aims to improve people's wellbeing where they live, learn, work and play. The Buyer wishes to appoint lead providers in priority regions who will be responsible for the day-to-day oversight of multiple programmes and delivery within their local community. The Buyer will provide leadership and coordination at a national level.]

We need a computer system that has these functionalities:

1. Online Ordering Capability: Franchisees need the ability to offer online ordering to customers for convenient and efficient food ordering.
2. Inventory Management: Franchisees require effective inventory management to track stock levels, streamline procurement, and prevent stockouts or wastage.
3. Menu Management: Franchisees need efficient menu management to easily update and maintain their menu offerings across multiple locations.
4. Training and Support Resources: Franchisees require access to comprehensive training materials and support resources to ensure consistent operations and successful management of their restaurants.
5. Reporting and Analytics: Franchisees and the franchisor need robust reporting and analytics capabilities to gain insights into key performance metrics and make informed business decisions.

What we don't want

Include this section if there are outcomes or tasks that you don't want.

[Example: The Buyer does not want non-lead providers who cannot provide day-to-day oversight, or Proposals about abstract or speculative approaches to improving wellbeing in communities.]

We are looking for suppliers with extensive experience in the digitization of franchises in the Italian restaurant sector certified with CMMI level two.

What's important to us?

Explain what will influence your selection of Successful Respondents. What are the key outcomes? Describe what's important to you. Are you interested in public value or new ways of doing things? Do you want to see evidence of public value such as Broader Outcomes in the course of delivering the contract? Are there any pre-conditions or other expectations? Provide key points here, you can include more details in Section 2 (Our Requirements).

[Example: The Buyer is looking for providers who have the capability, experience and infrastructure to deliver Wholesome Life in their community. They need to have a good track record in the management and implementation of community-based programmes. The Buyer is interested in a service that may also deliver broader outcomes such as employment opportunities. It is expected that the providers will have effective networks and strong relationships (socio - cultural) within their local community.]

The computer system we are looking for must meet the following non-functional requirements:

1. Usability: Ease of use, ease of learning, adhere to established usability standards, accommodate users from different regions and languages, meet accessibility standards
2. Reliability: High availability rate, minimize the frequency and severity of failures that impact user experience, have robust mechanisms in place to recover from failures and restore normal operations with minimal data loss or downtime.
3. Performance: Provide fast response times, capable of handling a high volume of concurrent user requests, sufficient capacity to handle the expected data volumes and support the growth of the franchise network an start up and shut down within reasonable time frames.
4. Supportability: Designed to accommodate future changes, upgrades, and enhancements, compatible with the required hardware, software, and network infrastructure, provide configuration options to adapt to specific business requirements, designed to handle increased user loads, data volumes, installation process should be well-documented, straightforward and provisions for ongoing support, maintenance, and troubleshooting to ensure its long-term viability and reliability.

Why should you bid?

Motivate Respondents to bid. Be very clear about what's in it for them. What difference can they make? Why is your work worthwhile? Make a clear statement that shows what you are looking for, for example local community providers; suppliers with a large regional reach; providers who have particular interest or expertise in...

[Example: This is a unique opportunity to be part of a major New Zealand wellbeing initiative. Lead providers will support local leaders to implement voluntary initiatives that encourage families to live healthy, active lives. Through investment in community partnerships and a skilled intervention workforce, you will empower these communities to find local solutions to local needs.]

The computer system we are looking for would be adaptable for the digitization of multiple franchises and constitute a domain in which the supplier can reuse components in order to achieve the highest levels of quality in their products.

International Franchise Association (IFA) - <https://www.franchise.org/>: 2023 Report key highlights:

- The overall number of franchise establishments will increase by almost 15,000 units in 2023, or 1.9%, to 805,000 units in the U.S.
- Franchising will add approximately 254,000 jobs in 2023. Growing at 3.0%, total franchise employment is forecasted to reach 8.7 million.
- The total output of franchised businesses — the measure of total economic activity in nominal dollars — will increase by 4.2% to \$860.1 billion in 2023, up from \$825.4 billion in 2022.
- Franchises' GDP share of the overall economy will remain stable at 3%. Compared with 2022, franchises' GDP — the monetary value of all the finished goods and services produced within U.S. borders — will grow at a slightly slower pace of 4.2% to \$521.3 billion.
- Service-based industries and quick-service restaurants will witness higher growth than other industries.

A bit about us

An overview of what your agency does and how this procurement fits with your business or policy objectives.

[**Example:** The Buyer works across the social sector to deliver better outcomes for New Zealanders. The Buyer leads New Zealand's wellbeing, health and disability system, and has overall responsibility for the management and development of that system. The wellbeing of all New Zealanders means that we can achieve broader cultural, economic, environmental and social outcomes.]

AmRest in figures: 2380 Restaurants in 23 countries and 50000 employees.

At AmRest, we have spent more than 25 years implementing and proving this idea.

Since 1993, we have developed an extensive portfolio of brands that are leaders in their respective categories. We have spent more than 25 years successfully acquiring and developing own brands, such as La Tagliatella, Blue Frog and Sushi Shop. At the same time, and in tandem, we have created a solid portfolio of franchised brands, such as KFC, Pizza Hut, Burger King and Starbucks.

<https://www.amrest-franquicias.com/en/about-us>

SECTION 1: Key Information

Read these instructions and then delete them before publishing the RFP.

Do not change the names or sequence of the sub-headings, or the paragraph numbering in this Section. You can customise the areas highlighted in **YELLOW** according to your requirements.

When you have completed this Section please delete the **RED** instructions and un-shade the **YELLOW** shaded areas.

1.1 Context

- a. This Request for Proposals (RFP) is an invitation to submit a Proposal for the **AmRest Franchises, Procurement Department** contract opportunity.
- b. This RFP is a **[single-step OR the second step in a multi-step]** procurement process.

1.2 Our timeline

Here is our timeline for this RFP (all are **Basque Country** times and dates):

Respondent briefing session [Delete if not applicable]	10:00	15 01 2024
Deadline for Questions	12:00	15 02 2024
Deadline for us to answer questions		01 03 2024
Deadline for Proposals	12:00	15 03 2024
Presentations by shortlisted Respondents (indicative) [Delete if not applicable]		01 04 2024
Successful Respondent(s) notified (indicative) [Delete if not applicable]		15 04 2024
Expected start date of Contract (indicative)		01 05 2024

[Add any other items you wish to include above, but be clear where the timeframes are indicative only. You can add extra rows to the table above by clicking or tapping the table, then heading to the 'Layout' ribbon/tab in Word, and using the 'Insert above' or 'Insert below' button.]

1.3 How to contact us

- a. Contact us through our Point of Contact via email ~~or the Government Electronic Tenders System (GETS).~~
- b. Our Point of Contact:

Name: **Jon Etxebarria**

Title/role: **Head of the Procurement Department**

Email address: **j.etxebarria@amrest.com.** ~~**[Delete if not applicable, e.g. if all contact is to be via GETS]**~~

- e. ~~[To register for our Respondent briefing session contact our Point of Contact via GETS or email]. [Delete if not applicable]~~

1.4 Developing and submitting your Proposal

- a. This is an [open/closed], competitive tender process.
- b. Take time to read and understand the RFP.
- c. Take time to understand our Requirements. These are in SECTION 2 of this document.
- d. Take time to understand how your Proposal will be evaluated. See SECTION 3 of this document.
- e. For resources on tendering visit <https://www.amrest-franquicias.com/procurement>
<https://www.procurement.govt.nz/suppliers-2/>
- f. If you have questions, ask our Point of Contact before the Deadline for Questions (see Section 1.2 above).
- g. Use the Response Form [insert hyperlink] to submit your Proposal.
- h. Complete and sign the declaration at the end of the Response Form.
- i. Use the Pricing Schedule [insert hyperlink] for your pricing information.
- j. [Insert any additional instructions here. Especially if it is a two-envelope system, mailbox size limit, limit on number of pages and font size, format for soft copies etc.]
- k. Check you have provided all the necessary information in the correct format and order.
- l. Submit your Proposal before the Deadline for Proposals.

1.5 Address for submitting your Proposal

There are two options. Choose one and delete the other. Your choices here will have an impact on the minimum required timeframes for your RFP process. See Rule 31 - Allowable reductions.

OPTION ONE: Electronically (preferred option, gives an allowable reduction under Rule 31).

Submit your Proposal to the following address: j.etxebarria@amrest.com.

We will not accept Proposals sent by post or delivered to our office.

~~**OPTION TWO: Hard copies with one soft copy. (No allowable reduction under Rule 31).**~~

Submit your Proposal in hard copy to the address below and soft copy by to the following address: [insert agency email address or GETS in-box address]. We require [insert number] hard copies, and [insert number] soft copy/s.

For Proposals sent by post:

[insert name of procurement]
[insert name of Buyer's responsible officer]
[insert name of agency]
[insert postal address e.g. PO Box]
[insert city].

For Proposals delivered by hand or courier:

[insert name of procurement]
[insert name of Buyer's responsible officer]
[insert name of agency]
[insert street address]
[insert city].

[End of Option 2]

Make sure you include all attachments and reference material. Option (include if you are using the two-envelope system as per SECTION 3 below) [Make sure all pricing information is in a separate file.]

1.6 Our RFP Terms

a. Offer Validity Period

By submitting a Proposal, the Respondent agrees that their offer will remain open for 6 calendar months from the Deadline for Proposals.

b. RFP Terms

By submitting a proposal, the Respondent agrees to the RFP-Terms described in SECTION 6 .

c. Variations [Delete this paragraph and the table below if not applicable]

We have made the following variations and/or added special conditions to the RFP Terms: {

List the variations you have made to the RFP Terms in the table below. Specify which (if any) are legally binding obligations (see Section 6.21 of the RFP Terms). To add new rows to the table, click or tap an existing row, and hit the '+' button that appears on the far right of the table.

#	Variation or addition to RFP Terms	Contractually binding?
1.	[insert details]	[Y/N]

Remember, if a Respondent commits a non-trivial breach of the RFP Terms, we may exclude them from further participation in the RFP process, whether or not that requirement is contractually binding.

1.7 Later changes to the RFP or RFP process

- a. After publishing the RFP, if we need to change anything or provide additional information, we will let all Respondents know by ~~placing a notice on GETS or contacting Respondents by email~~.
- b. ~~If you downloaded the RFP from GETS you will automatically receive notifications of any changes through GETS.~~

1.8 Defined terms

These are shown using capitals. You can find all definitions at the back of the RFP-Terms.

SECTION 2: Our Requirements

Read these instructions and then delete them before releasing the RFP.

Describe what you want to purchase.

Copy the Requirements from your procurement plan. Make sure you align your Requirements, Evaluation Approach and Response Form questions, e.g. if the Respondent **must have a particular accreditation** to be successful then make sure this is made clear to the Respondent in your Evaluation Approach and there is a question in the Response Form asking for details.

Outline the Requirements from a performance (outcomes based) perspective, rather than a conformance (inputs based) one. This allows Respondents flexibility in their proposed solutions and shows that you are open to innovation.

Avoid describing goods or services by their design characteristics or brand names. See [Rule 27](#) Technical Specifications.

Include any specific legislation or standards that apply to this procurement e.g. Health and Safety standards. State whether the standard is required or preferred. Mention any security clearance requirements that the successful Respondent must meet.

Broader Outcomes

Broader Outcomes are the secondary benefits generated from a procurement. They can be social, environmental, cultural or economic and should be considered and incorporated where appropriate ([Rule 16](#)). **Including Broader Outcomes is important for delivering public value through procurement.** The [Government Procurement Rules 17 to 20](#) set out priority outcomes for which there are explicit requirements for agencies to incorporate or consider in designated contracts.

Explain clearly and concisely what you need and the outcomes you expect. Think about [Public Value](#). Include Broader Outcomes details and how your procurement will incorporate these secondary benefits.

For more information and resources to help you prepare your RFP visit www.procurement.govt.nz/procurement/

From here, you can tailor this Section 2 as you wish, and change sub-headings and content to suit your needs. The following sub-headings are suggestions; you can delete any that are not relevant.

When you have completed this Section 2 please un-shade the **YELLOW** shaded areas, and delete all the instructions in **RED**.

2.1 Background

This procurement relates to [insert policy or business outcome that it relates to]. Previously these have been provided by [summarise how the goods or services have been delivered in the past]. Going forward we wish to [insert your strategy for future delivery].

2.2 Key outcomes

Key outcomes are about what we are buying and why. This RFP relates to the purchase of [describe the specific goods or services]. The outcomes we want to achieve are [insert key outcomes, including expectations of Broader Outcomes].

2.3 What we require from a Respondent:

a. track record

We are seeking Respondents that have [describe the required experience or track record].

b. capability

We are seeking Respondents that can [describe the required skills or capability].

c. capacity

We are seeking Respondents that can [describe the required processes, timeline or capacity].

d. solution

We are looking for solutions that [describe the specific goods or services required].

e. Broader Outcomes **[Delete if not applicable]**

We are seeking Respondents that can demonstrate [describe the broader or priority outcomes required].

2.4 Other information

a. We estimate the quantity to be delivered is [provide details about quantity].

b. The [goods/services] must be delivered to [insert location for delivery].

c. Payment will be [on successful delivery of milestones / at the end of the Contract / monthly on invoice].

2.5 Contract term

We expect that the Contract will commence [insert month and year]. The anticipated Contract term and options to extend are:

Description	Years
Initial term of the Contract	[insert number of years]
Options for us to extend the Contract	[insert e.g. up to two extensions of one year each i.e. X+1+1]
Maximum term of the Contract	[insert number of years]

2.6 Contract value

We estimate the value of this Contract to be \$[x] plus GST for the initial term, and [x] plus GST in aggregate if all renewals and extensions are taken up.

2.7 Key deliverables

Description	Indicative date for delivery
[describe first key deliverable / milestone / outcome]	[insert delivery date]
[describe first key deliverable / milestone / outcome]	[insert delivery date]
[describe first key deliverable / milestone / outcome]	[insert delivery date]

To add new rows to the table, click or tap an existing row, and hit the '+' button that appears on the far right of the table.

2.8 Other tender documents

These documents have been uploaded on GETS and are available to Respondents – they form part of this RFP. These include:

- RFP Response form.
- Pricing Schedule.
- List any other documents or useful information that you think will be relevant to the Respondent in relation to this RFP].

2.9 Delivery locations

We anticipate the Respondent will need to deliver the goods or services to these locations:

Location	What is being delivered here?
[insert]	[insert]

Please state in full where the Contract will need to be delivered. If this is multiple locations, list them all. To add new rows to the table, click or tap an existing row, and hit the '+' button that appears on the far right of the table.

SECTION 3: Our Evaluation Approach

This section sets out the Evaluation Approach that will be used to assess Proposals.

Read these instructions and then delete them before publishing the RFP. Describe here how you will evaluate Proposals.

Copy the Evaluation Approach from your procurement plan. Make sure your Evaluation Approach aligns with your Requirements and Response Form questions, e.g. if the Respondent must have a particular accreditation make sure this is made clear to the Respondent in your Evaluation Approach, and there is a question in the Response Form asking for details.

Your evaluation criteria are the set of standards or tests that you'll judge Proposals against, including preconditions, public value (including any Broader Outcomes), capability and capacity. Your Evaluation Approach must be able to assess Proposals on these factors.

From here, you can tailor this section as you wish, and change sub-headings and content to suit your request. The following sub-headings are suggestions; you can delete any that are not relevant.

When you have completed this Section please delete the RED instructions and un-shade the **YELLOW** shaded areas.

BUYER TIP:

Public value means the best available result for New Zealand for the money spent, using resources effectively, economically and responsibly.

The principle of public value when procuring goods, services or works does not mean selecting the lowest price, but rather the best possible outcome for the total cost of ownership (over the whole-of-life of the goods, services or works).

3.1 Pre-conditions **[Delete if not applicable]**

(See Rule 28: Pre-conditions for more information).

Each Proposal must meet the following pre-conditions. We will not consider Proposals which fail to meet these conditions.

BUYER TIP:

- Pre-conditions are requirements that must be met, either at the time of submitting the Proposal, or within a certain (designated) timeframe. If you intend to allow Respondents to meet a requirement at a later date, then it is not a pre-condition and should not be included here.
- Pre-conditions allow you to immediately eliminate any Respondent who doesn't have the minimum capacity or capability to deliver the Contract. Pre-conditions are usually answered by a 'yes / no' or 'meets / does not meet'.
- Be careful not to limit market competition by including unnecessary pre-conditions. Only use them if they are essential to the delivery of the Contract.
- Bear in mind that if you include overly prescriptive pre-conditions and then fail to apply (i.e. you change your mind and decide to consider some Proposals that do not meet the pre-conditions), your decision could be legally challenged.
- Be explicit e.g. it is not sufficient to require that the Respondent is 'fully accredited'. You should specify what accreditations you require e.g. 'is registered builder accredited for solar installations.'
- Some examples of pre-conditions are included below. Customise the table to your requirements, but remember to use them sparingly.
- Respondents who meet all the pre-conditions are then eligible to be assessed against the scored evaluation criteria. See [Rule 28](#).

#	Pre-conditions
1.	[insert]

Please add whatever pre-conditions are essential for your procurement. To add new rows to the table, click or tap an existing row, and hit the '+' button that appears on the far right of the table.



EXAMPLES OF PRE-CONDITIONS (FOR ILLUSTRATION ONLY)

- All drivers of a vehicle being operated in a small passenger service must hold a passenger (P) endorsement on their driver licence and have a current ID card.
- All lawyers providing the Services must hold current New Zealand Law Society practicing certificate.
- The Respondent must have current professional indemnity insurance of at least NZ\$5M.
- The Respondent must hold current ISO 9001 Certification.

3.2 Evaluation model

Choose which evaluation model you will use to assess public value and decide on your Successful Respondent.

Option 1: Lowest price conforming:

Use where price is the main criterion [

The evaluation model is **lowest price conforming**. This means that all Proposals that are capable of full delivery on time will be shortlisted. The shortlisted Proposal that is the lowest price over whole-of-life will likely be selected as the Successful Respondent.]

Option 2: Simple score, price weighted:

Use where price is a weighted criterion and all criteria are of equal weight [

The evaluation model is **simple score** (all criteria are of equal importance). Price is a weighted criterion. This means that all Proposals that are capable of full delivery on time will be shortlisted. The Proposal that scores the highest will likely be selected as the Successful Respondent.]

Option 3: Simple score, price not weighted:

Use where price is **not** a weighted criterion, and all criteria are of equal weight [

The evaluation model is **simple score**. Price is not a weighted criterion. Proposals that are capable of full delivery on time will be shortlisted by score, and the Successful Respondent(s) will then be selected from the shortlist based on an overall assessment of best value-for-money over the whole-of-life of the Contract.]

Option 4: Weighted attributed, price weighted:

Use where price is a weighted criterion and different criteria have different weights [

The evaluation model is **weighted attribute**. Price is a weighted criterion. All Proposals that are capable of full delivery on time will be shortlisted. The Proposal that scores the highest will likely be selected as the Successful Respondent.]

Option 5: Weighted attributed, price not weighted:

Use where price is **not** a weighted criterion and different criteria have different weights [

The evaluation model is **weighted attribute**. Price is not a weighted criterion. Proposals that are capable of full delivery on time will be shortlisted by score, and the Successful Respondent(s) will then be selected from the shortlist based on an overall assessment of best value-for-money over the whole-of-life of the Contract.]

Option 6: Price quality method:

Use where you think proposals could vary significantly in both price and quality, and you want a systematic way to trade off different combinations of price and quality. You should only use this method if you have been specifically trained on how to use it correctly. [

The evaluation model is **price quality method**. This means the non-price criteria will be scored, and a formula will then be used to determine a “supplier quality premium”, representing the extra amount we would be willing to pay for the difference in quality between each Proposal and the lowest scored proposal. The supplier quality premium for each Proposal is then subtracted from the proposed price, resulting in an “adjusted price”. The Proposal with the lowest adjusted price will likely be selected as the Successful Respondent.] [End of Option 6]

Overall assessment:

It can be useful to allow the Buyer some flexibility to avoid an overly “mechanistic” application of the chosen evaluation methodology, i.e. if due to an unforeseen circumstance the methodology suggests selection of a proposal that clearly does not provide the best overall public value.

All Proposals that meet the pre-conditions are evaluated using the evaluation model. Scores will assist in deciding the Successful Respondent(s), but ultimately the decision will be based on which Proposal(s) we consider will provide the best overall public value.

However, the Buyer will need a clear justification if it chooses to override the outcome of a strict application of the evaluation methodology, and there is a risk the decision could be legally challenged. The Buyer should consider obtaining probity and/or legal advice before doing this.

Two envelope system:

Use with any of the other options above. Recommended if you think price could vary significantly between Proposals, and there is a risk that a higher or lower price could skew the evaluation team’s perceptions of non-price attributes. If you use the Price Quality Method, you **must** use the two envelope system. [

We will use the “two-envelope” system to conduct evaluations. Respondents must provide all financial information relating to price, expenses and costs in a separate sealed envelope or soft copy file. The evaluation panel will score each Proposal according to the weighted criteria in Section 3.3 below, and then examine the financial information of each Proposal. The panel will assess which Proposals to shortlist based on the scores and the total costs over the whole-of-life Contract.] [End of two envelope option]

3.3 Broader Outcomes [Delete if not applicable]

(See Rule 16: Broader Outcomes for more information)

We will evaluate Proposals which promote Broader Outcomes. These may be social, environmental, cultural or economic.

BUYER TIP:

- For certain, designated, contracts, you should carry out due diligence to make sure your Respondents are promoting Broader Outcomes within their operations and output.
- A good way to do this is to include Broader Outcomes questions in your RFP.
- Not every Broader Outcome can be included within every procurement opportunity, so you should assess what, if any, Broader Outcomes apply to your specific procurement.
- There's a Broader Outcomes table in Section 2.3 of the RFP Response Form which you can include or delete, as appropriate.
- Make sure any Broader Outcomes identified are included in the Contract.
- For more information on Broader Outcomes visit <https://www.procurement.govt.nz/broader-outcomes/>

3.4 Evaluation criteria

We will evaluate Proposals [which meet all pre-conditions] (delete if not applicable) according to the following criteria and weightings.

Note: If you intend to apply weightings include them here. If you do not intend to apply weightings list the criteria in order of importance with the most important criterion first, and state that is the case.

Criteria	Weighting
Track record [add description].	XX%
Capability of the Respondent to deliver [add description].	XX%
Capacity of the Respondent to deliver [add description].	XX%
Proposed solution [add details].	XX%
Broader Outcomes [customise this section and weighting to the Broader Outcomes that have been identified in the Requirements]. [Delete if not applicable]	XX%
Price (Include only if price is a weighted criterion. If you use the price quality method, you must include price as a weighted criterion.)	XX%
Total weightings (Double check that your weightings add up to 100%)	100%

3.5 Scoring

You can replace this scoring scale with a different one approved by your agency.

Rating	Definition	Score
EXCELLENT	Respondent demonstrates exceptional ability, understanding, experience and skills. The Proposal identifies factors that will offer potential added value, with supporting evidence.	9-10
GOOD	Respondent demonstrates above average ability, understanding, experience and skills. The Proposal identifies minor additional benefits, with supporting evidence.	7-8
ACCEPTABLE	Respondent demonstrates the ability to meet the criteria, with supporting evidence.	5-6
RESERVATIONS	Satisfies only a minimum of the criteria but not all. Reservations about the Respondent to adequately meet the criteria. Little supporting evidence.	3-4
SERIOUS RESERVATIONS	Extremely limited or no supporting evidence to meet the criteria. Minimum effort made to meet the criteria.	1-2
UNACCEPTABLE	Does not comply or meet the criteria at all. Insufficient information to demonstrate the criteria.	0

3.6 Price

If a Respondent offers a substantially lower price than other Proposals, we may make enquiries or require additional evidence to verify that the Respondent can meet all the Requirements and conditions of the Proposed Contract for the price quoted. Note: Any claims made about price must be clear, accurate and unambiguous. Prices must include or be clear about Goods and Services Tax (GST).

3.7 Due diligence

These are checks you may or may not make. Delete or add as applicable.

For shortlisted Respondents, we may:

- reference check the Respondent and any named personnel
- make other checks against the Respondent e.g. a search of the Companies Office or NZBN
- interview Respondents

- d. request Respondents make a presentation
- e. arrange site-visits
- f. test products
- g. inspect audited accounts for the last [number] financial years
- h. undertake a credit check
- i. undertake a Police check for all named personnel

3.8 e-Auction [Delete if not applicable]

We will conduct an e-auction with shortlisted Respondents.

[See [Rule 45](#). If you intend to do an e-auction you need to alert Respondents to this, and include the process and the specific criteria that you will use in the e-auction.]

SECTION 4: Pricing information

Read these instructions and then delete before publishing the RFP.

Make it clear what level of detail you require in the pricing information. We recommend that you provide a Pricing Schedule along with the Response Form to make it easier for Respondents to structure their pricing information and for your evaluation panel to compare 'apples with apples'.

From here, you can tailor this section as you wish, and change sub-headings and content to suit your request. The following sub-headings are suggestions; you can delete any that are not relevant. When you have completed this Section please un-shade the **YELLOW** shaded areas.

4.1 Pricing information provided by Respondents

- a. Respondents must use the Pricing Schedule provided.
- b. The Pricing Schedule must show a breakdown of all costs, fees, expenses and charges. [Insert here details of any costs that you want to ensure are captured e.g. freight costs, exchange rate fluctuations etc]. It must also clearly state the total Contract price exclusive of GST.
- c. Where the price is based on fee rates, specify all rates, either hourly or daily or both as required.
- d. Respondents must show how they will manage risks and contingencies related to the delivery of the Requirements.
- e. Respondents must document all assumptions and dependencies that affect its pricing and/or the total cost to us. In other words, if the Respondent would expect us to pay more than the quoted price or estimate if particular assumptions or dependencies are not satisfied, the Respondent must call out those assumptions and dependencies.
- f. Respondents must tender prices in NZ\$. Unless otherwise agreed, we will arrange contractual payments in NZ\$. [If there are foreign exchange implications explain how risk in foreign exchange will be dealt with here.]
- g. Respondents may submit a pricing approach that is different to the Pricing Schedule, however, the Respondent must also submit a Pricing Schedule that conforms.
- h. If two or more Respondents intend to submit a joint Proposal the Pricing Schedule must include all costs, fees, expenses and charges chargeable by all Respondents. [State how you want the invoicing completed, e.g. only the lead in the consortium will issue invoices.]

SECTION 5: Our Proposed Contract

Read these instructions and then delete before publishing the RFP.

Insert the Proposed Contract here. For low value and low risk procurements we recommend that you use the Government Model Contract format which you can find in the Templates section of our website.

Your procurement or legal team can advise you as to the appropriate terms and conditions for this procurement.

The Proposed Contract can be a separate document or pdf, in which case reference where it can be found.

From here, you can tailor this section as you wish, and change sub-headings and content to suit your request.

When you have completed this Section please delete the RED instructions and un-shade the **YELLOW** shaded areas.

5.1 Proposed Contract

The Proposed Contract that we intend to use for this procurement is attached to this RFP (via GETS).

In submitting your Proposal you must let us know if you wish to question or negotiate any of the terms or conditions in the Proposed Contract or wish to negotiate new terms or conditions.

The RFP Response Form contains a section for you to state your position. If you do not state your position you will be deemed to have accepted the terms and conditions in the Proposed Contract in full.

[Attach the Contract here or submit via [GETS](#)]

SECTION 6: RFP Terms

View the [RFP Terms](#) dated [insert date].