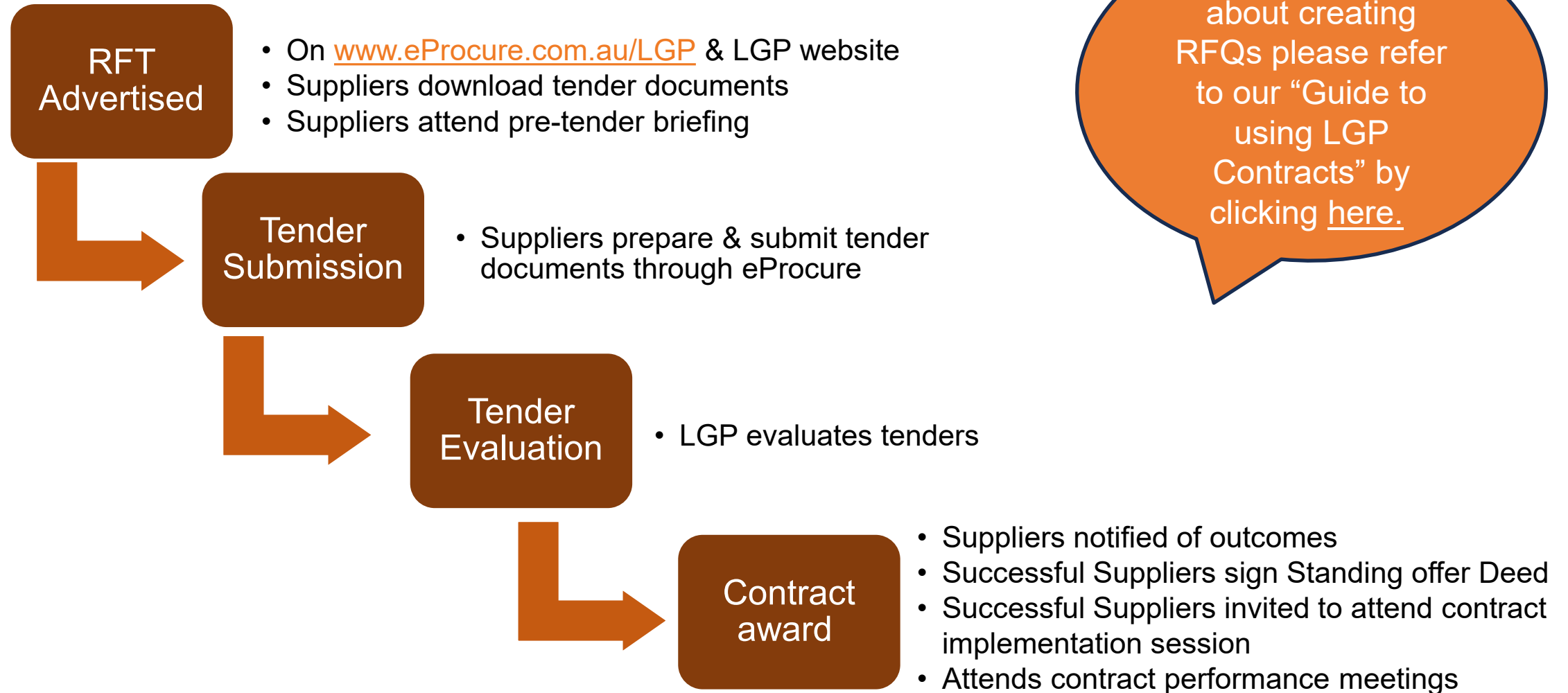# A Guide to Evaluating RFQs & Awarding Contracts under LGP Panels

For the NSW Local Government Sector

The LGP Tender Process

RFT Advertised

- On www.eProcure.com.au/LGP & LGP website
- Suppliers download tender documents
- Suppliers attend pre-tender briefing

Tender Submission

- Suppliers prepare & submit tender documents through eProcure

Tender Evaluation

- LGP evaluates tenders

Contract award

- Suppliers notified of outcomes
- Successful Suppliers sign Standing offer Deed
- Successful Suppliers invited to attend contract implementation session
- Attends contract performance meetings

For information about creating RFQs please refer to our "Guide to using LGP Contracts" by clicking here.

LOCAL GOVERNMENT PROCUREMENT

Agenda

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Logging In
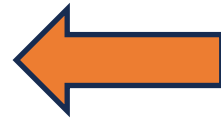
To-Do Tasks

Evaluate and decide on responses — 12
Requests to finalize — 1
Complete draft Requests — 2

As you log into VendorPanel you can easily see if there are requests to finalise, and also how many.
On the left you can see I have one request to finalise and one draft request that is not completed.
You can access your responses from the "My Requests" menu.

On the right of your home screen, you can also see the Requests.

Here you can:
1. Preview Request.
2. Download everything to do with the request.
3. View statistics for the Request.
4. Click for additional options.

My Requests

View all requests | ⊕ Create new | ⊕ Pick from template

Filter: | View: All | Sort by: select an option

1   2 3 4

RFQ Test
🕐 Closing on 20/Dec/2023 09:00 AM — VP383785

Traffic Control for 5 Days
Draft: **Finish?** — VP376935

Test Request 2 Paul
✓ Finalized on 17/Aug/2023 08:56 AM — VP374755

Test Request Paul
✓ Finalized on 15/Aug/2023 02:55 PM — VP374217

Showing 1 to 4 of 4 entries

REQUEST OPTIONS (VP383785)

⊙ Edit this Request
⊙ Delete this Request
⊙ Transfer to another user
⊙ Hide from homepage
⊙ Make template from this

RESPONSE EVALUATION OPTIONS

You have selected the 'Quick Select' method to evaluate responses.

⊙ Change this method
⊙ View responses
⊙ Finalize this Request

Accessing Responses

After a Request has closed, you can click to view the responses you've received by clicking the "green people" icon.

You can then click the **Access Responses** button to view the details of the Supplier submissions.

IMPORTANT:
By accessing the submitted responses, you will no longer be able to make any changes to your request, including re-opening, editing, updating or accepting late responses.

Access Responses

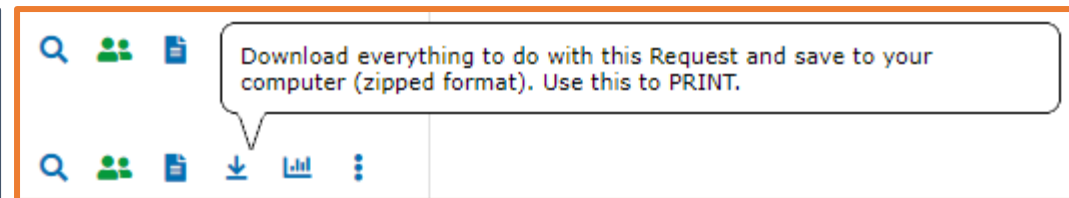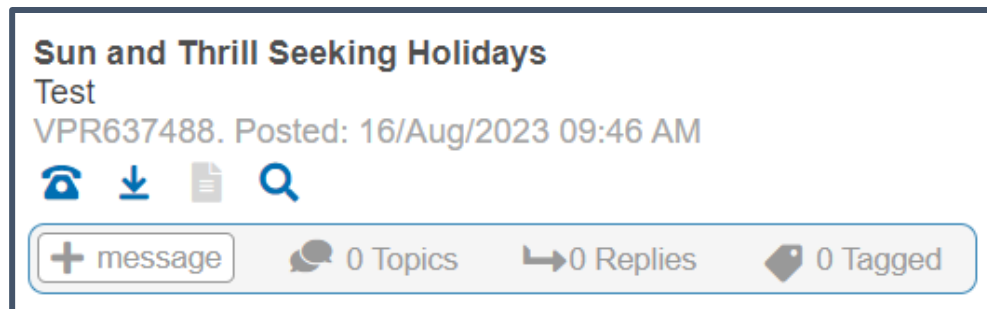LOCKED   0 notes 0 docs   Select Decline

*Please note, as mentioned above, you cannot reopen the Request once you unlock responses. You cannot reverse this once you've unlocked the Responses as this finalises the response submission stage.

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Accessing Responses

Once you have unlocked the responses you can view the details, download any attachments & download an entire response or a full Request 'package' (this includes Supplier responses).

You can do this by clicking one of the relevant icons highlighted below:

- **Phone** - Click to view the Supplier's contact details

- **Magnifying glass icon** - View the Supplier's response

- **Documents icon** - View/download individual documents attached to their response

- **Download icon (below response)** - Download the entire response & all attachments

- **Download icon (right)** - Download the response package (includes all responses)

Sun and Thrill Seeking Holidays
Test
VPR637488. Posted: 16/Aug/2023 09:46 AM

☎ ⬇ 📄 🔍

+ message   💬 0 Topics   ➡0 Replies   🏷 0 Tagged

🔍 👥 📄

Download everything to do with this Request and save to your computer (zipped format). Use this to PRINT.

🔍 👥 📄 ⬇ 📊 ⋮

Evaluating

When submitting a Request using the Request Wizard, you may remember selecting an evaluation method. You can change the method up until your Request has been finalised as per the below (right) screenshot.

Congratulations! You are ready to post your Request!

How do you anticipate evaluating and deciding on supplier responses?

Please select the method you anticipate using to evaluate and recommend which supplier(s) will be successful (or not) with regards to this Request.

Please note the following:

- You must select or decline all responses to this Request to finalize and commit your evaluation decisions.
- Suppliers will only be advised of their selection status after this Request has been finalized. You will be asked to confirm this.
- You can change this method at anytime up until you've finalized and committed your evaluation decisions.

⦿ Quick Select ❓
◯ Evaluation Matrix ❓

STEP 1 : Select or decline responses

Select or decline each response in order to finalize your Request. Suppliers will only be notified of your decision (and any feedback provided) after the Request has been finalized

Evaluation Method: 'Quick Select' ❓ [change]

➕ Message to suppliers   💬 0 Topics   ➡ 0 Replies   🏷 0 tagged

The Trustee For Lgp (Lga Nsw) Trust & The Trustee For Lgp (Sa Nsw) Trust
Test
VPR681114. Posted: 16/Jan/2024 11:53 AM
☎ ⤓ 📄 🔍
➕ message   💬 0 Topics   ➡ 0 Replies   🏷 0 Tagged
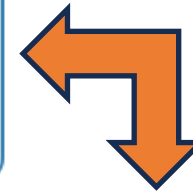
YOUR DECISION   0 notes 0 docs
❓ Undecided... (decide by 17/Jan/2024 04:00 PM)
Cost : *not set* (update)

▸ Select
▸ Decline

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Evaluating & Selecting Responses

- **Quick Select**: Allows Buyers to simply '*Select'* or '*Decline'* each Supplier response. This method is appropriate for evaluations undertaken offline or external to VendorPanel

- **Evaluation Matrix**: Requires the Buyer to create an evaluation matrix that only they use to evaluate each response. The responses can then be compared by their scores on the matrix. The final decision is made by the Buyer who selects or declines each response

- *For all evaluation methods, private notes, documents & feedback for Suppliers can be attached to each decision

LOCAL GOVERNMENT PROCUREMENT

Evaluating: Quick Select

▸ Allows you to simply **"Select"** or **"Decline"** each Supplier response

▸ This method is appropriate for evaluations undertaken offline or external to VendorPanel

▸ When selecting or declining a response you can add private notes or a message to the Supplier regarding your decision

▸ You can change a decision by clicking the reset button next to the decision

Evaluating: Evaluation Matrix

▸ This method requires you to create an Evaluation Matrix to evaluate each response.

▸ The responses can then be compared by their scores on the Matrix.

▸ When viewing your unlocked responses click the "Create Matrix" button.

STEP 1 : Create evaluation matrix

Create matrix

Evaluation Matrix is a tool to allow you to add evaluation criteria, assign weights, then complete your evaluation.

Suppliers will only be notified of your decision once all decisions are lodged and your Request is finalized.

Evaluation Method: 'Evaluation Matrix' ? [change]

+ Message to suppliers   0 Topics   0 Replies   0 tagged

You can see / or change the evaluation method here.

Evaluating: Evaluation Matrix

- ▶ Select "Add New"

- ▶ For each criteria enter a name, description & a weighting.

- ▶ The weighting can be what you like but must add up to 100.

- ▶ Use the Evaluation Matrix Wizard to guide you through the process. (Click blue font for help!)

- ▶ If the decision is about cost or price – tick the box provided & this will automatically score & weight the cost.

Selecting Responses & Notifying Suppliers

Selecting Responses:

▶ An email will be sent to each Supplier you evaluated (except for those you specifically exclude from receiving an email) advising them of your decision on their submission/s

▶ Any feedback you may have included for them will be added to this email

▶ In all instances, your decision & feedback on their submission will be visible from within their account within VendorPanel

Notifying Suppliers:

▶ Councils sometimes send out a formal letter a.k.a. Letter Of Award or Letter of Acceptance or Decline. You may elect not to send a notification to the Supplier via VendorPanel

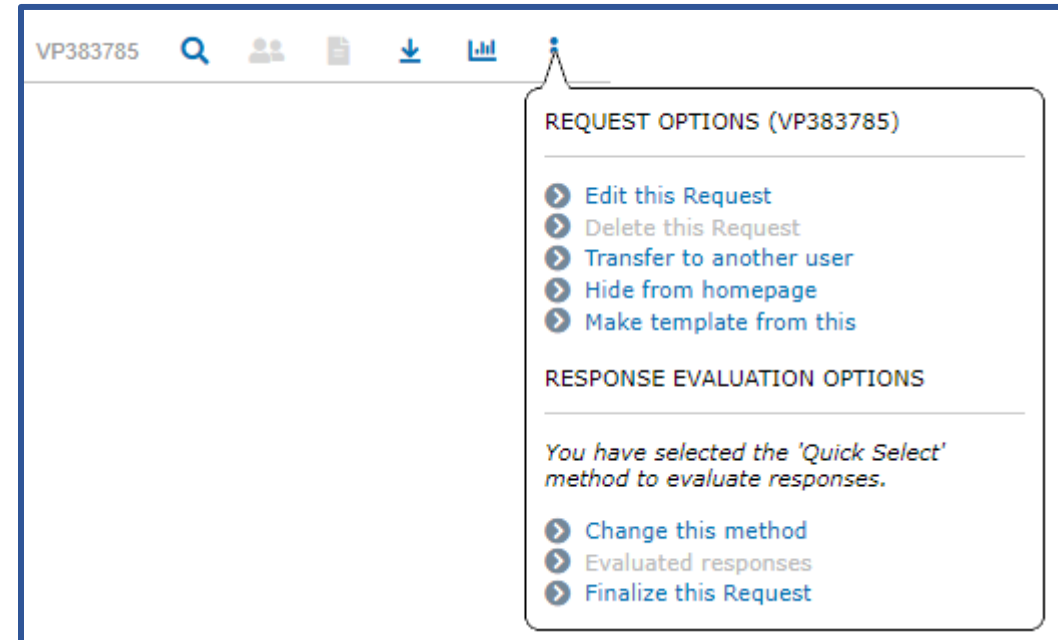*(Check with your individual Councils procurement process for guidance on this)

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RFQ Tips

Handy Tip:
You can transfer the request across to another user in Council.
In case you're going on leave!

You can also still:
- Edit to extend your decision date
- Hide the RFQ from your homepage
- Create a template from your RFQ
- Change your evaluation method
- Continue on to finalise your request

VP383785

REQUEST OPTIONS (VP383785)

- Edit this Request
- Delete this Request
- Transfer to another user
- Hide from homepage
- Make template from this

RESPONSE EVALUATION OPTIONS

You have selected the 'Quick Select' method to evaluate responses.

- Change this method
- Evaluated responses
- Finalize this Request

Finalising Your Request

1. You will need to have either **selected** or **declined** each Supplier response.

2. To finalise the Request, click the **Go to Finalize** button at the top of the Responses page.

3. Then, click the **Finalize this Request** button at the bottom of the page.

4. Suppliers will then be advised of your decision by an account notification & an email (unless you have deselected the email notification option at the response selection step).
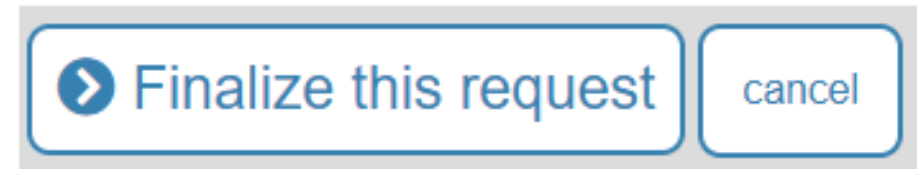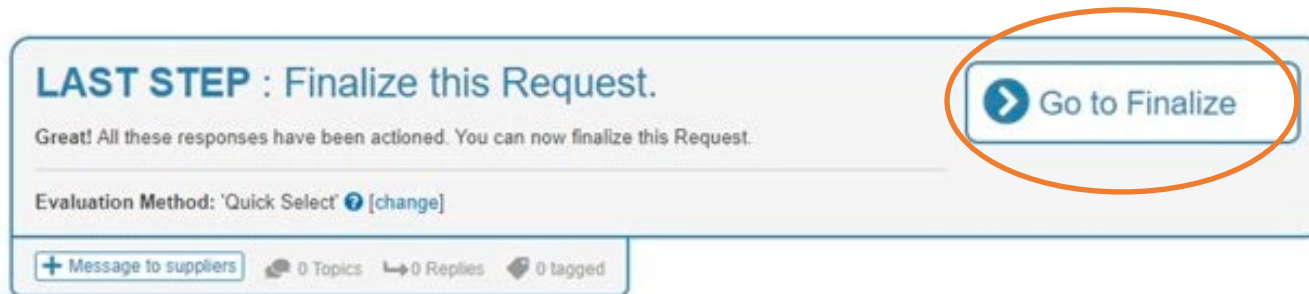
Finalising Your Request

Finalizing this Request.

Request info

Buyer	: John Smith (lgpdemo4@gmail.com)
Request	: Test Request 2 Paul
Ref Num	: VP374755
Date closed	: 16/Aug/2023 05:00 PM
Evaluation Method	: Quick Select
Num Responses	: 1

Successful Supplier	: Sun and Thrill Seeking Holidays, VPR637488

IMPORTANT : When this Request is finalized you will not be able to change the method of evaluation or reset your responses selections. In addition, an email will be sent to each supplier you evaluated (except for those you specifically exclude from receiving an email) advising them of your decision on their submission(s). Any feedback you may have included for them will be added to this email. In all instances, your decision and feedback on their submission will be visible from within their account.

☐ Hide Request from my homepage (this Request will still be accessible via the 'My Requests' menu)

❯ Finalize this Request

To finalise, click the **Finalize this Request** button (bottom left of the page).

www.vendorpanel.com.au says

You are about to finalize this Request...

When this Request is finalized, you can no longer re-open or edit it. You will also no longer be able to change the method of evaluation or reset your responses selections. In addition, suppliers who have responded will be notified of your decision on their submissions and provided with any feedback you may have included for them.

Click OK to finalize this Request or cancel.

OK   Cancel

Finalising Your Request

Final VendorPanel Step

▸ To make life easy remember to "download everything to do this this request" (4th button)

▸ This can be done from the home screen

▸ Upload all files to your document management system.

Next Steps!

<u>Good News!</u>

The VendorPanel side of things
   is now complete!

The next few things we'll cover off are:
- Documentation
- Disclosure Requirements
- Next Steps

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Formal Instruments of Agreement

- A Formal Instrument of Agreement is sign off between both Council & Supplier and is used to execute a contract between council and the successful supplier.

- This applies in more complex arrangements e.g.: Consulting and construction or ongoing arrangements.

- Refer to your Council's Procurement Guidelines to determine if you need

  to execute a contract with the successful Supplier.

- The Formal Instrument of Agreement needs to refer to the LGP Client Contract as the contract Terms & Conditions. Check the LGP Standing Offer Deed for more details.

Formal Instruments of Agreement

▸ The Instrument of Agreement is a document detailing the agreement between the two parties & is legally binding

▸ Once the Instrument of Agreement is created, you must send a copy to the successful Supplier for signatures

▸ The Council officer with the appropriate financial delegation must countersign

▸ Both parties must sign this document

▸ Then send a copy (signed by both parties) to your Supplier for reference

Disclosure Requirements

GIPAA

▸ GIPAA stands for Government Information Public Access Act.

▸ Falls under NSW Government legislation & was designed to promote an "open, accountable, fair & effective" Government by giving members of the public access to Government information.

▸ On execution of contracts over $150k, register on your GIPAA contract register.

▸ Every Council has a contract register.

▸ Talk to your Records or Procurement team if you have any questions.

Next steps?

▸ Once this last step has been finalised you have successfully evaluated your RFQ & awarded a contract to a Supplier.

▸ The communications & documents are compliant with your Council's Procurement Policy

▸ You have covered off your legal obligations.

▸ Time to raise a Purchase Order for your goods or services.

▸ Congratulations!

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Questions?

[Who can help? – Local Government Procurement (lgp.org.au)](lgp.org.au)