

Transport
for NSW

Get Tender Ready

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About this video series

The NSW Government is committed to supporting economic participation and social outcomes, developing skills and creating jobs for NSW citizens. This means building a diverse supply base by enabling small and medium enterprises, social enterprises, disability enterprises and Aboriginal businesses to engage with procurement opportunities. Numerous policies reflect these commitments, including the [Small and Medium Enterprise and Regional Procurement Policy 2021](#).

We recognise that our supply chains are complex, and opportunities are not always with the NSW Government but through our supply chains, e.g. with principal contractors.

This video series supports diverse businesses in applying for infrastructure project tenders. The guidance in the videos comes from 'real life' examples of tender documentation and minimum requirements for infrastructure procurement opportunities in NSW. This series was developed by Transport for NSW and iClick2Learn, a Dubbo-based social enterprise certified under [Social Traders](#).

About the author

Natalie is a tender and grant writer and assessor. She has helped raise over 45 million dollars for services and product submissions while working with enterprises, small businesses and the not-for-profit sector. Natalie holds an 82.5% grant and 94.2% tender success rate. She teaches and mentors people to apply for tenders and grants and establish grant and tender businesses. Natalie is the author of 'Win the Grant' being published in May 2022 and 'Win the Tender' scheduled for late 2022.

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Contributors

Transport for NSW

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How can I get tender ready?

Tenders can help you secure contracts and gain a financial and competitive advantage. When a prospective client procures suppliers from the market, they go through the process of developing a tender. This process might have a single stage with tenders advertised to an open market, or there might be multiple stages. The multi-stage process includes a pre-approval stage. Once you are a pre-approved supplier, you will receive invitations to submit a quote, proposal or tender.

It can take time between tender opportunities. You can use that time to prepare so you successfully demonstrate your capabilities and qualifications. If you are new to tender responses, spend some time gathering information. Doing the work up-front makes you tender ready.

Types of procurement approaches

Prospective clients have different procurement approaches. The most common are:

Request for information/expression of interest/pre-qualification process

A request for information, an expression of interest, or a pre-qualification process gathers information from organisations. It is generally part of a more extensive process called due diligence. It starts with a series of questions. You will answer the questions and submit documents and evidence to support your answers. Then, the client will review your submission to determine whether you meet their standards. Most procurement processes use this stage to develop a pre-approved supplier list. It will be the first of the procurement stages for some clients, followed by one of the below approaches.

Request for quotation

The prospective client requests a quotation. The quotation is typically for a small, clearly defined piece of work within their budget delegation. You will provide an hourly or daily rate quotation based on your fee schedule. The main driver here is price.

Request for proposal

The prospective client understands their business needs. But they may need ideas for addressing that need. They will rely on your expertise and experience to recommend approaches.

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Request for tender

This approach is used when the work is outlined in enough detail for the suppliers to describe how they'll address the technical, operational and compliance aspects of the work. You may not have every detail, but you will have enough to work out your solution, develop a response and cost it. The client will request a total cost for the project, and they will want this cost broken up in a budget.

How do you find out about tender opportunities?

You can find tender opportunities through multiple websites. Registering with the Industry Capability Network (ICN) is an excellent start. Once you register, you can get your details in the system and access tenders, some of which can only be found on ICN. You can also gather all the information for your tender toolkit and pre-qualification process and access support. Another good idea is identifying specific companies you'd like to work with. Contact them directly to discover their procurement or tender processes.

Helpful links:

<https://gateway.icn.org.au/>

<https://www.tenders.nsw.gov.au/>

<https://www.tenders.gov.au/>

<https://business.gov.au/products-and-services/contracts-and-tenders/find-tenders-and-contracts>

What to do when a tender is announced?

When a tender is announced, you should review the documents to see if it is of interest. If it is, register for the tender and any information sessions. Then, analyse the documents in detail. Prepare your questions and check the tender documents for directions on asking them. To ensure competitive fairness, tenderers usually share all questions and answers with registered businesses, so know that a potential competitor could read your question and answer. See the second video in this series for more information.

Develop your tender toolkit

























A tender toolkit contains the essential documents and information for submitting a tender. We've included a spreadsheet of the minimum information you should have ready. Keep all documents on

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a shared drive if you're working with a team or sub-contractors. In the following pages, you will find a template checklist to help you develop your tender toolkit and a range of templates to get you started.

If you contract any work out, you will need much of the above information on that business. You may not have to submit it, but you'll want to have the updated information on file. You can include this step in your procurement process and annual document review/update. We have included a downloadable zip file with a suggested file structure and all your templates.

- ▼  Business information
 - >  Capability statement
 - >  Compliance matrix
 - >  Organisational structure
- ▼  Case studies
- ▼  Contractor information
- ▼  Financial records
 - >  Last financial year audit
- ▼  Insurances
- ▼  Key plans and policies
- ▼  My tender responses
 - >  Attachments to include
 - >  Draft response schedule
 - >  Final documents lodged
 - >  Response outline
 - >  Tender pack
- ▼  Personnel
 - >  CVs
 - >  Licenses
 - >  Qualifications and Certificates
- ▼  Risk Management
 - >  Risk management plans
 - >  Risk management procedures
- ▼  Standards and accreditation

Templates for your tender toolkit

We have supplied several templates that you can change or adapt for your business in the document: Get Tender Ready Templates. The templates include:

Tender toolkit checklist

This is a sample of the information you may wish to include in your tender toolkit. Some of these items may not be relevant, and you may want to remove or add information. Consider what is appropriate for your business and your type of work.

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Capability statement

Capability statements introduce your business. They include information on who you are, what you do, and how and where you do it. They also offer case studies and, sometimes, references. You'll want to keep the length at one or two pages. If you offer different product categories or services, you might assign one quarter page to one full page for each.

As these are public documents and there are many creative ways to present them, we have not provided an example. Instead, we have included a list of things to consider adding to your capability statement. For now, you can research businesses in your industry to see how they present their capability statements. Hopefully, a relevant industry example will inspire you and offer more insight than a list.

Capability statements are part of your tender toolkit. They're also an excellent marketing tool. When prospective clients research suppliers, they want to see and download a capability statement. Once yours is finished, add it to your website. It can also be beneficial to email your capability statement to existing clients to show the scope of your products and services. Existing clients are easier to access than new clients, so reach out and see how you can help.

Capability statements are typically two to four pages. Keep them concise while providing the information the prospective client needs. Capability statements generally include:

- Company details
- Overview of company
- Core competencies/Capabilities/Products and Services
- Differentiators (why they should choose you and not another similar business)
- Accreditations and certificates
- List of past projects
- Testimonial/s and client logo/s
- Contact details

As this is a marketing document, you should have it designed. There are many useful tools that can help you design quickly and cost-effectively, such as a free Canva account. Here are some design examples: <https://www.canva.com/proposals/templates/>

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Organisation chart

There are two example charts included.

The first is how you might show your organisational chart.

The second example is for a tender response where you are expanding your team using internal staff or in a contract arrangement with another business.

You can use Microsoft Word to design an organisational chart. Go to Insert > SmartArt > Hierarchy and choose your preferred format.

Learn more here: <https://support.microsoft.com/en-us/topic/create-an-organization-chart-9b51f667-11b7-4971-a757-a08a36684ee6>

Capability matrix

A capability matrix can also be called a competency or skills matrix. It documents your team's skills and is updated as team members develop more skills and experience. If you have one document for your whole team, you can easily align the right team members to the suitable tenders.

The capability matrix helps you identify strengths and weaknesses. For example, is there only one person trained in a specific area? From a risk management perspective, should you have other team members skilled up?

Supplier information sheet

This is a helpful document for both tender and non-tender clients.

Staff CVs

There are two example templates included to help demonstrate your staffing capabilities.

This first example gives a summary. It can also show non-management team members.

The second example allows for more detail. It's suitable for management and key project or technical team members. You can include photos of your team members as well.

Compliance matrix

The compliance matrix demonstrates to prospective clients that you meet your business compliance requirements and those requirements listed in the tender documents.

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Case studies

Included is a sample table you could use to gather information for your case studies. You could also include referee details, images and other visuals such as statistics.

Schedule of rates

We have included an example of a rate card. The first table relates to individuals providing the service, typically in consulting or service contracts. You should know how much each person in your business costs you and what you charge per hour for that person.

The second example is more for technical service and supply. You should know the cost and sale price for all products and services you provide.

The best approach is to have a detailed schedule of rates, also called a rate card, with updated information. You can transfer this information into the required format for the tender.

Contractor details

Resource links

Below are key resources, noting this list is not exhaustive and that support programs and available funding change from time to time.

Business support catalogue developed for Transport for New South Wales

https://www.transport.nsw.gov.au/system/files/media/documents/2020/Business-Support-Catalogue-july-2020_0.pdf

Standards, compliance and policies

<https://www.smallbusiness.nsw.gov.au/small-business-guide-selling-to-nsw-government>

<https://www.smallbusiness.nsw.gov.au/>

<https://business-connect-register.industry.nsw.gov.au/pages/home5.html>

<https://nswicc.com.au/>

<https://www.rdaorana.org.au/>

<https://www.smallbusiness.nsw.gov.au/>

<https://business.vic.gov.au/tools-and-templates/financial-policies-and-procedures-manual-template>

Policies

<https://business.vic.gov.au/tools-and-templates/hr-policies-and-procedures-manual-template>

<https://www.fairwork.gov.au/tools-and-resources/templates>

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<https://www.industrialrelations.nsw.gov.au/employers/nsw-employer-best-practice/workplace-policies-and-procedures-checklist/>

Health and safety

<https://www.safeworkaustralia.gov.au/>

<https://www.safework.nsw.gov.au/advice-and-resources>

<https://business.gov.au/risk-management>

<https://www.transport.nsw.gov.au/projects/current-projects/jobs-skills-and-industry-participation>

Sustainability

<https://www.supplychainschool.org.au/>

<https://inlandrail.artc.com.au/building-inland-rail/sustainability/sustainability-and-suppliers/>

<https://www.environment.nsw.gov.au/topics/sustainability/sustainability-advantage/leadership-opportunities/pathways-to-clean-energy-and-net-zero-emissions>

<https://www.environment.nsw.gov.au/questions/making-small-business-more-sustainable>

<https://inlandrail.artc.com.au/building-inland-rail/sustainability/sustainability-and-suppliers/>

<https://business.gov.au/risk-management/environmental-impact>

Hiring and training

Diversity and inclusion resources:

<https://humanrights.gov.au/our-work/chapter-3-recruitment>

<https://www.dese.gov.au/employment/hiring-under-25-year-old-staff>

<https://www.apsc.gov.au/working-aps/diversity-and-inclusion/indigenous-capability-agency-portal/indigenous-recruitment-guide>

<https://humanrights.gov.au/our-work/business-and-human-rights/publications/property-construction-and-modern-slavery-2020>

Compiling and writing

<https://www.smallbusiness.nsw.gov.au/>

<https://business-connect-register.industry.nsw.gov.au/pages/home5.html>

<https://nswicc.com.au/>

<https://www.rdaorana.org.au/>

<https://dubbochamber.com.au/>

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