Transport
for NSW

Understand Tender Requirements

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NSW
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Table of Contents

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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Download your tender pack

When you download the tender documents, you'll see the client's information, including invitation to tender, scope of works and conditions of contract. You will also find templates for you to complete. Download all the documents into your tender folder. These documents form what is called a 'tender pack.' Examples of common documents include:

Conditions of tender

This document details the tender process, including communication, compliance, selection criteria, evaluation process and probity matters.

Tender requirements

This document details what the prospective client wants to achieve. Other names for this document include 'specifications' or 'scope of works.' Depending on the tender, this document might include a scope of works, technical specifications and drawings. It is designed to give you enough information to understand the client's needs and develop your solution.

Scope of works

This document outlines the tendered work. Depending on the requirements, you might find drawings and floorplans.

Terms and conditions of contract

This document outlines the contractual relationship you must fulfil if offered a contract. Be sure you can meet these terms and conditions before submitting a tender response.

Tender forms and schedules

When forms and schedules are provided by the prospective client, use them to format a response. Forms may include a blank pricing schedule or a template spreadsheet for you to complete. Prospective clients provide these templates for a consistent approach when comparing your tender response with others.

Addenda

The prospective client may release documents called addenda/addendums. Addenda documents are updates or further information given to those who have registered interest in the tender. Addenda can include responses to questions asked.

Tender submission timeline

Once you've reviewed the tender requirements, consider the resources and time required to meet the response deadline. Below is an example of the tasks and estimated times needed to complete the tender. You can add or modify tasks as needed.

Place the final tender submission date in the last line. Then work backwards, using the time allowance as a guide. If you can meet the commitment, the next step is to review the bid/no bid checklist.

Date	Time allowance	Task	Who
	2 days (10hrs)	Scope the tender requirements and compliance matters	
	1 day (5hrs)	Identify client's needs, key messages, values and priorities	
	1 day (5hrs)	Research the client and key messages	
	1 day (5hrs)	Brainstorm solution with your team and reflect on information to-date	
	1 day (5hrs)	Identify information required from external parties and start sourcing. This can include quotes.	
	1 day (5hrs)	Finalise response outline (See video 2: understand tender requirements)	

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2hrs per question	Finalise your answer map (See video 4: how to address tender questions)
3hrs per question	Write your first draft
2 days (10hrs)	Finalise and update your supporting documents, including diagrams, policies and plans
2 days (10hrs)	Develop a budget
2 days (10hrs)	Finalise draft and edit
2 days (10hrs)	Read, edit and write your final draft. Check compliance attachments.
	TENDER SUBMIT DATE

We have included an adaptable submission timeline in in the document: Understand Tender Requirements Templates

Tender requirements

To decide if this is a suitable tender, work through the documents in detail. Remember, the requirements explain what the prospective client needs, but the documents do not contain every detail. The prospective client relies on tender responses to fill knowledge gaps and provide suggestions. Sometimes the prospective client is ‘testing’ the market to explore various approaches and ideas. You should apply your industry knowledge and experience to show how your solution is the best fit.

Analysing the tender documents

The prospective client writes the documents that outline the scope of works. There is plenty of valuable information in these documents and many ways it can be analysed.
Start by deciding if this is the right tender for you. Don’t commit to delivering a service unless you have the resources and want to work

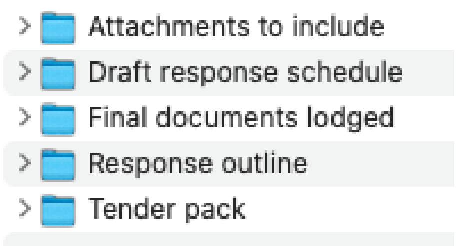
with the prospective client. You can use a ‘bid/no bid’ checklist to help with your decision.

Sometimes, you will feel a tender is a good fit. If that’s the case, dig deeper into each element to make a more informed decision. If you feel confident proceeding, go to step two, the response outline. The response outline is a comprehensive view of what the client wants and what you need to do next.

Step 1: bid/no bid decision

This checklist will help you decide if a tender is right for you. As a general checklist, it won’t suit all situations. But it will help you understand the tender in greater detail. It delves into the objectives, evaluation criteria, tender requirements, scope of works and compliance matters and asks if you can deliver to the standard the client expects. Once you’ve decided to proceed with the tender, start the response outline in step two.

Included in the video series is a zip file with a folder called ‘my tender responses.’ You can use this as a template filing structure for your tenders and for the information you develop.



Step 2: response outline

The response outline helps you document tender questions and how you will address them. Read through the tender documents and transfer the information to the response outline. Break up important areas like the objectives, evaluation criteria, compliance areas and requirements. Review every document you’ve received. When you get updated information like frequently asked questions, add it to the outline.

Think of the response outline as a summary of tender information. For some tenders, you won’t be able to provide the detailed scope of works, but this is a summary. Consider including document and page references. Then, when you want to go back to that section and read it from the tender, it's easier to find.

It might feel unnecessary to transfer information from the tender documents into another document. The benefit is that you have a structure that makes sense to you. Because you've gone through each document line by line, you won't overlook anything. If you forget to address something or attach something, rarely will you be asked for that information. More than likely, you'll receive a 0 score for not meeting the minimum compliance requirements. Even if the information isn't mandatory, your evaluation stage score will be negatively impacted. And a lower score can prevent you from receiving an offer.
You must demonstrate understanding in your response. The best way to fully understand is to work through each document in detail. To avoid missing anything, open each document as a Word document. If the document is a PDF, there are tools to open it as a Word document. Or you can copy and paste the text into a Word document. Then, cut and paste the tender contents into the outline.

The better you understand the prospective client and the procurement process, the more client-focused your solution. To identify procurement process motivators, look under headings like 'objectives' or 'priorities.' List them in the response outline and note how they might be achieved.

Bid/no bid checklist

Below are example questions to ask yourself before you work on the tender.

Compliance matters

The first thing to check is compliance matters. You'll find this information in the tender terms and conditions and the contract. Thing to check include:

- Do you have the right insurance and licenses?
- Are you willing to accept their terms?
- Do you meet minimum compliance requirements?

Strategic assessment

The second is a strategic assessment:

- Does this help you progress your business goals and those of your prospective client?
- Does this help progress your business strategy and help you build your workforce and market strength?

Consider the prospective client:

- How can help them achieve their strategic objectives?
- Do you align with their values?
- What are the key messages in the tender?
- What are their priorities?

Capacity to deliver

The third area you'll assess is whether you and your contractors have the resources, skills and experience to deliver. You'll need to look at the tender requirements and any other information such as diagrams and maps.

- If you don't have capacity, can you work with another business?

Response assessment

In the fourth area, you'll consider each aspect or question that requires a response.

- What information do you have to help you respond to those questions?
- Is there anything you need to develop to support or evidence your responses?

Competitive assessment

The last area of reflection is your strengths and weaknesses as compared to your competitors. Review the evaluation criteria. Consider who might be applying and what your strengths are.

- What are the evaluation criteria and how strong or weak are you in these areas?

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Templates

We have included an adaptable response outline to complete before you start working on your next tender. Replace the instructional text. You can add rows and additional areas that appear in your tender documents.

You will find this checklist in in the document: Understand Tender Requirements Templates

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