

Title	Prepare a RFx document for release to the market		
Level	6	Credits	25

Purpose	People credited with this unit standard are able to prepare a RFx document for release to the market.
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Classification	Infrastructure Civil Engineering > Infrastructure Asset Management
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Available grade	Achieved
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Guidance Information

- 1 It is recommended that people hold credit for Unit 18926, *Plan a procurement activity*, before being assessed against this unit standard.
- 2 All evidence for this unit standard must be in accordance with current editions, and any subsequent amendments, of the following:
 - *Government Procurement Rules: Rules for Sustainable and Inclusive Procurement* (4th ed.). (Ministry of Business, Innovation and Employment, 2019) available at <https://www.procurement.govt.nz>.
 - *Procurement manual for activities funded through the National Land Transport Programme* (New Zealand Transport Agency, 2018), available at <http://www.nzta.govt.nz/resources/procurement-manual/>.
- 3 Definitions
Asset information refers to client budgets for maintenance expenditure, maintenance history, contract scope and interface maps, asset inventories, contract pro-forma, special requirements for maintenance contracts.
Procurement documentation refers to any of the following – procurement strategies, procurement plans, RFx documents, evaluation plans, evaluation reports.
RFx refers to one of the following – request for proposal, request for tender, request for quotation, registration of interest. These may include the tender advertisement, conditions of tender, General Conditions of Contract, Special Conditions of Contract, specifications, drawings, or Schedule of Prices.

Outcomes and performance criteria

Outcome 1

Prepare a RFx document for release to the market.

Range two documents using supplier selection methods – lowest price conforming, weighted attributes, price quality, quality-based selection.

Performance criteria

- 1.1 Questions about project-specific factors are posed in the RFX document that differentiate the tenderers based on the value for money their offer will provide.
- 1.2 Selection tools are customised to be fit-for-purpose for a specific project.
- Range choice of supplier selection method, attributes to be used, weightings for attributes, testing of supplier quality premiums, marking scales that employ objective descriptors to provide clarity to tenderers.
- 1.3 A robust and detailed procurement plan is used to determine the supplier selection method, the attributes, weightings, questions and scoring guidance within the RFX document.
- 1.4 All necessary information is collated to enable suppliers to develop compliant responses.
- Range detailed descriptions of the scope of activities required and/or the outcomes sought by the client from supplies; relevant technical specifications and drawings, Conditions of Contract and Conditions of Tendering; basis of payment, resource consents, service plans, asset information.
- 1.5 A submission date is set that allows suppliers sufficient time to develop their responses.
- 1.6 A tender evaluation process is specified.
- Range may include – short-listing procedures if applicable, supplier selection method, weightings for non-price attributes and price, scoring scales if applicable, objective definition of non-conformance in relation to attributes, procedure for site visits, interactive meetings or interviews, allowance or otherwise and method of evaluation of alternative tenders.
- 1.7 Tender submission process and minimum requirements of tender responses are specified.
- Range may include – the date, time, format, and address (or portal) for submission of tenders; contact details of a person responsible for administering the tender and responding to questions; the expected timeline for tender evaluation.

1.8 The principles of cost-efficiency for evaluators and suppliers are applied to the processes in the RFx document.

Range appropriate information demands relative to the scale and risk profile of the project; selection of project-specific questions that demonstrate suppliers’ ability to deliver value for money; weightings that are commensurate with the quantity and level of detail sought in the response; clear quality assurance processes that minimise errors, inconsistencies, or lack of clarity for respondents; minimising special or non-standard conditions of contract and conditions of tendering.

1.9 Quality assurance checks are undertaken prior to release of the RFx document.

Range quality assurance checks include – level of information sought from respondents is consistent with weightings and project priorities; submission information is consistent and error-free; appropriate timeframes given for responses in accordance with *Government Procurement Rules*; special conditions of contract are minimised and fit for purpose for the project; instructions to tenderers are clear and unambiguous; information sought from respondents is appropriate for the level of risk and complexity of the contract; questions are clearly relevant and targeted to contract priorities.

1.10 Descriptions within the RFx document of communications with suppliers comply with relevant legislation and maintain confidentiality.

Range may include – inclusiveness, transparency, clarity and promptness, responsiveness and cooperation, confidentiality between the client and the specific tenderer; written records are maintained; briefing meetings, responses to queries, notices to tenderers, notices to specific tenderers, letters, telephone conversations, verbal discussions, emails, notification of preferred tenderer, contract negotiations, notification of contract award, tender debriefs.

1.11 Procurement documentation is correctly publicised.

1.12 Closed contest supplier selection procedures are correctly described.

Planned review date	31 December 2024
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Status information and last date for assessment for superseded versions

Process	Version	Date	Last Date for Assessment
Registration	1	22 January 2002	31 December 2011
Review	2	24 September 2003	31 December 2011
Review	3	18 March 2011	31 December 2017
Review	4	19 May 2016	31 December 2021
Review	5	22 August 2019	N/A

Consent and Moderation Requirements (CMR) reference

0101

This CMR can be accessed at <http://www.nzqa.govt.nz/framework/search/index.do>.

Comments on this unit standard

Please contact Connexis – Infrastructure Industry Training Organisation qualifications@connexis.org.nz if you wish to suggest changes to the content of this unit standard.