

## ANNEXURE 4

### Quotation Procedure

#### Introduction

This *quotation procedure* provides guidance on how the *Consultant* prepares and the *Employer* assesses a quotation for a proposed Work Package instructed under Clause 15.1 of the Framework Agreement.

#### Package Order information provided by the *Employer*

The *Employer* will prepare the Package Order information using a standard proforma and include:

- (a) the title of the Work Package and reference number;
- (b) a description of the Scope of the requirements;
- (c) details of the level of access that the *Employer* will make available to its own persons, places and things to facilitate completion of the Work Package;
- (d) details of the anticipated start and end dates;
- (e) details of the deliverables and delivery dates and or other conditions;
- (f) details of any specialist expertise, experience or qualifications required;
- (g) any constraints that apply to the delivery of the Work Package;
- (h) any changes to the Package Order conditions of contract that are deemed necessary; and
- (i) Any other relevant information.

The *Employer* sends the Package Order information together with the award criteria to the *Consultant* and instructs the submission of a Package Order quotation.

For Lot 1 valuation services a simplified approach will be adopted as set out in Annexure 3. The *Employer* will contact *framework consultants* to set out the valuation service requirements and to confirm their ability and availability to provide the services. The *Employer* will select the list of *framework consultants* to be considered for the required services as explained in Annexure 3. The *framework consultants* will be informed of their inclusion on the list of firms from which the final *Consultants* will be chosen.

#### Quotation information prepared by the *Consultant*

The *Consultant* prepares a Package Order quotation in the form required by the *Employer* that comprises the following documents:

- (a)
  - a plan setting out the *Consultant's* proposals for
    - 1) delivery of the services and deliverables;
    - 2) a quality statement;
    - 3) the resourcing of the Work Package include details of key personnel, CVs and an organisational chart;
    - 4) a programme;
- (b)
  - The required commercial information setting out the *Consultant's* price for delivering the services;
- (c)
  - any further information requested by the *Employer*.

For Lot 1 valuation services the *Consultant* will inform the *Employer* of the availability of personnel to deliver the services, the ability of the *Consultant* to perform the services in the required geographical location and the *Consultant's* price for delivering the services. The *Consultant* may also set out any specific factors which would allow them to provide better value in delivering the services.

#### **Assessment of the *Consultant's* quotation by the *Employer***

The *Employer* will evaluate the quotations received from the *Consultant* and other framework consultants in accordance with the criteria notified in the Package Order information. For Lot 1 valuation services will carry out evaluations as explained in Annexure 3.

The *Employer* will determine whether the *Consultant's* quotation represents value for money taking into account the technical quality of the *Consultant's* proposal and the proposed or anticipated price.

The *Employer* is under no obligation to accept the *Consultant's* quotation.

In accordance with the framework agreement the *Employer* may request the *Consultant* to submit a revised quotation.

The *Employer* may negotiate with the *Consultant* to finalise the documents comprising the Package Order.

#### **Package Order award**

The *Employer* will inform the *Consultant* of the outcome of its assessment.

Subject to internal governance the *Employer* confirms the award of the Package Order and the parties sign the Package Order contract in the form set out in Annexure 7 unless otherwise agreed in writing.

The *Consultant* confirms acceptance of the Package Order.