



This form is to be completed when seeking approval on Procurement Strategy for Goods, Services or Construction Works.

[*] Denotes a mandatory field

To: *	General Manager – Raoul Harper		
From:	Brian Barnewall		
Position: *	Works Manager	Contact No: *	
Project code: *		Budget Approved: *	YES <input checked="" type="checkbox"/> NO <input type="checkbox"/>
Project Name (if applicable):	Civil equipment purchase – used bulldozer		
Estimated Value: *	\$150,000 (ex GST and inc. delivery to Bridport or Welshpool)		

Procurement Outcome *

Describe the required outcome from the procurement process.

Purchase of used bulldozer and delivery to either Bridport or Welshpool.

Specification or Brief (describe the goods and/or services being procured) *

Item description	Bulldozer
Operating weight	15,000 – 21,000 kg
Working hours	Less than 14,000
Documentation	Detailed service and repair history
Blade type	S or SU Blade
Special equipment/fittings	Ripper

How does this procurement link to the Corporate Plan? *

E.g. Approved capital expenditure, breakdown – effecting delivery of wastewater services

A budget allocation for this item has been approved annual plan and associated budget.



Procurement Particulars / Checklist

Question	Selection - Description	
	Activity	Description
What is the method of Procurement? *	<ol style="list-style-type: none"> 1. Market sounding 2. Item specification 3. Item longlist 4. Shortlist 5. Item inspections 6. Select preferred machine and negotiate directly 7. Procure 	<p>Investigate the various used equipment websites and speak to suppliers and other operators to understand the relationship between hours, equipment spec levels and cost.</p> <p>Finalise item minimum specification.</p> <p>Engage directly with various suppliers, seek details and list prices, develop a list of options, up to 8-12 machines</p> <p>Undertaking a scored criteria methodology, using financial and non-financial criteria, rank the longlist to create a shortlist, ideally 2-3 machines.</p> <p>Inspect the top 2-3 (Brian and the diesel mechanic)</p> <p>Negotiate the final price of sale directly (verbally and with email following up for documentation purposes) and select the preferred machine.</p> <p>Finalise procurement with written documentation detailing the item, specification, price and any other conditions of purchase.</p>
Who will be involved in the Document preparation? *	Brian Barnewall and Tim Phillips	
What is the estimated time to prepare Documentation? *	<1 Week	
What will the Validity Period be for submissions? *	14 days	
If Procurement is selective, who are we approaching?	Known suppliers of used equipment	
Who will be responsible for responding to queries / RFI's? *	Brian Barnewall	



Exemption from Tender, EOI, RFP, Multiple Quote Request

Brief summary on why an exemption is being sort from Tender, EOI, RFP or multiple quotations.

- The requirement to advertise and seek detailed submissions in a tender form is not the way these suppliers generally operate. In essence these are either people selling used construction equipment or owner operators with a particular machine for sale.
- During the tender process there is the possibility the item will actually sell. (If they send in a tender it is likely they will have the item in a yard with a For Sale sign on it).
- The requirement for the supplier to provide a formal tender process potentially removes our ability to negotiate the price following an inspection.
- There is a lot of variability in the items, most notably condition and this is best assessed via a physical inspection, and the outcomes of this inspection used to negotiate a final price.

Evaluation Criteria & Prerequisites

Question	Selection - Description
What is the required level for Public Liability Insurance? *	Not applicable
What is the required level for Professional Indemnity Insurance? *	Not Required
How will Submissions be assessed? *	Two Part Assessment - List Criteria
Assessment Criteria: (delete or modify as required)	
Part 1 – Non Financial	
<ul style="list-style-type: none"> • Operating hours • Gross Horse power • Equipment levels • Cab Protection • General condition with particular reference to undercarriage. • Weight • Documentation of repairs and service history 	
Part 2 – Financial	
<ul style="list-style-type: none"> • Price (ex GST) 	

Assessment Panel*

List the assessment panel members and the area represented.

Name	Role
1. Brian Barnewall	Lead
2. Tim Phillips	Assessment support
3. Alan Rhodes	Workshop Coordinator



Approved by: *

Approval must be within purchasing delegations.

Name	Signature	Position	Date
Raoul Harper		General Manager	

OTHER CONDITIONS OF APPROVAL