



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

[ \* ] Denotes a mandatory field

<b>To: *</b>	General Manager – Raoul Harper		
<b>From:</b>	Brian Barnewall		
<b>Position: *</b>	Works Manager	<b>Contact No: *</b>	
<b>Project code: *</b>		<b>Budget Approved: *</b>	YES <input checked="" type="checkbox"/> NO <input type="checkbox"/>
<b>Project Name (if applicable):</b>	Civil equipment purchase – used bulldozer		
<b>Estimated Value: *</b>	\$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"> <li>1. Market sounding</li> <li>2. Item specification</li> <li>3. Item longlist</li> <li>4. Shortlist</li> <li>5. Item inspections</li> <li>6. Select preferred machine and negotiate directly</li> <li>7. Procure</li> </ol>	<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
<b>Assessment Criteria: <i>(delete or modify as required)</i></b>	
Part 1 – Non Financial	
<ul style="list-style-type: none"> <li>• Operating hours</li> <li>• Gross Horse power</li> <li>• Equipment levels</li> <li>• Cab Protection</li> <li>• General condition with particular reference to undercarriage.</li> <li>• Weight</li> <li>• Documentation of repairs and service history</li> </ul>	
Part 2 – Financial	
<ul style="list-style-type: none"> <li>• Price (ex GST)</li> </ul>	

## Assessment Panel\*

List the assessment panel members and the area represented.

Name	Role
1. Brian Barnewall	<b>Lead</b>
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**