



## Template Guide

### What is a Tender Management Process?

A Tender Management Process is a formal method by which potential suppliers are identified, evaluated and selected for the supply of products (goods or services) to the project. The process entails the creation of a suite of tender documentation outlining the project requirements, receiving tender responses and selecting preferred suppliers, based primarily on the quality of their response. A Tender Management Process is used to ensure that the selection of preferred suppliers occurs in a fair and honest manner.

Although a number of types of Tender Management processes exist, this document provides a worked example of one particular type of tender process: the RFI / RFP process. This involves:

- Issuing a Statement of Work (which describes the project requirements)
- Issuing a Request for Information (requesting general supplier information)
- Issuing a Request for Proposal (requesting detailed supplier proposals)
- Receiving and evaluating each response, based on its merits
- Choosing a preferred supplier, based on his/her merits
- Negotiating a formal contract with the preferred supplier.

### When to use a Tender Management Process

A Tender Management Process should be utilized whenever a product is required from outside the project and a preferred supplier has not yet been chosen. The Tender Management Process is initiated immediately after the Procurement Plan has been approved. The Tender Process is usually undertaken by the delegated Procurement Manager (or officer); however, for large projects a Tender Committee may be formed to oversee the tender process.

Without a formal Tender Management Process in place, it may not be possible to show that the method by which preferred suppliers were selected was rigorous and fair. The Tender Management Process is terminated only when the preferred suppliers have been selected and the supplier contracts formally signed.

### How to use this template

This document provides a guide on the topics usually included in a Tender Management Process. Sections may be added, removed or redefined at your leisure to meet your particular business circumstance. Example tables, diagrams and charts have been added (where suitable) to provide further guidance on how to complete each relevant section.