**Checklist for planning your response to an RFx**

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| **Action** | **Advice** | **Status** |
| **Before the RFx comes out** |  |  |
| Find out when the RFx is coming out | Keep up with your networks and be registered on tender opportunity services such as GETS so you hear about RFXs as soon as possible. |  |
| Prepare for when the RFx comes out | Have you established sub-contractor relationships (if you need them)? Have you built up your background information library? |  |
| **When the RFx comes out** |  |  |
| Make the go/no-go decision | Decide as early as possible if it’s worth bidding for this work. If you feel your chances are low and the cost too high, call a halt quickly to minimize costs |  |
| Register interest in responding to the RFx | Register your interest with the buyer so you receive any amendments. Registration may be a mandatory requirement. |  |
| Diarise the closing date | All your planning should start with the closing date: work back from there to define deadlines. Late tenders will not usually be accepted. |  |
| Find out the response format | If the format is hard copy, build production and delivery time into your bid schedule. Make sure you allocate time to print all the copies requested and that you know where to send them.  For electronic delivery, ensure you leave sufficient time to do the upload. Do a test to check upload speeds – these may vary during the day. |  |
| Assemble your bid team and hold a kick-off meeting | Meet to discuss the RFx and so that everyone involved is focused and committed. Set early deadlines and ensure contributors meet them. |  |
| Build a solid understanding of all the requirements | Check that you’ve read the RFx document carefully. Note down important points and make a checklist of things to do. |  |
| Draft the Executive Summary | Writing and distributing the Executive Summary as soon as possible will help ensure everyone is on the same wavelength. |  |
| Complete all mandatory RFx forms | Make sure you note them on your check list. If mandatory forms are not included with your submissions, your tender will be considered incomplete and will be eliminated. |  |
| Seek clarifications if required | If you do not understand something, talk to the buyer contact named in the RFx. |  |
| Ensure you’re fully informed | Attend any pre-tender briefing sessions. |  |
| Identify the evaluation criteria | Determine the criteria against which your tender will be evaluated and note any weighting placed on each of the criteria. |  |
| Understand the contract terms and conditions | Read the contract terms and conditions and make sure you can comply. |  |
| **Preparing your Response** |  |  |
| Follow the format specified in the RFx for your response | If the RFx specifies a particular response format, be sure to follow it. |  |
| Follow numbering used in the RFx document | If no set format for responding is specified, follow the general format and numbering of the RFx. Keep the question numbers the same as the RFx, regardless of how you might want to number the response in your proposal. |  |
| Consider how your tender will be presented | Your tender will be evaluated on content, but make it look as professional as possible with an attractive cover, headers and footers, illustrations, quotes and a table of contents. |  |
| Ensure you provide all the information requested | Have you been asked to supply other information and documents? Make sure you note these requests on your checklist. |  |
| Demonstrate your ability to meet all the evaluation criteria | Ensure you have clearly demonstrated or proven (not just asserted) your ability to fulfill all the evaluation criteria. |  |
| Complete the price or cost schedule for all items you are tendering | Have you included your costing for all items and followed the GST requirements? Have you presented it in the way the buyer has asked? |  |
| Indicate your compliance with the conditions of the contract | If you exceed the requirements, or only partially comply, have you provided a detailed explanation? |  |
| Gather and present referees | Are referee contact details correct? Have you contacted your referees to confirm they are willing to be a referee? Have you confirmed what they will cover? |  |
| Gather Health and Safety, Quality Assurance and Environmental documentation | Are any supporting documents required? Are they attached? |  |
| Check for amendments issued by the buyer | Have any amendments (sometimes called Notices to Tenderer or NTT) been issued and have you addressed these? |  |
| Critically review your tender. | Is your price competitive? Have you presented your background information in a compelling way and included unique selling propositions to make you stand out? |  |
| **Submitting your Response** |  |  |
| Make sure your contact details are clearly displayed | If appropriate, put the contact details of your prime point of contact on the cover of your bid. Include a contact details sheet (street address, postal address, email, website) toward the front of the bid. Also put your contact details on packaging and envelopes. |  |
| Sign all the appropriate forms | Have you correctly signed all appropriate RFx forms? |  |
| What is required on the tender envelope? | Check if specific information is required on the tender envelope –back and front – and how this is to be presented. |  |