



User Guide

Public authority instructions

- This template is part of the Procurement Services SA's suite of Standard Market Approach templates.
- Its use supports consistent procurement practice across the South Australian Government and makes it easy for suppliers to supply to government.
- This template is an example and your public authority may tailor this template to ensure it is fit-for-purpose and meets the requirements of its internal procurement framework.

User specific instructions

- This template can be used for either an Invitation to Supply or Expression of Interest and process.
- It is important that you update the footer and cover page accordingly.
- All guidance notes for using this template and suggested considerations are highlighted in **yellow** text throughout this template. The yellow highlighted text indicates where you are required to insert details relevant to the specific procurement.
- The guidance notes and suggested considerations should be used as prompts for procurement officers to help develop the specification. The level of detail to be included depends on a number of factors including the complexity of the procurement.
- For guidance on populating the sections of this template please refer to the *Developing a Specification Guideline*.
- All user guidance in this template should be deleted before the Specification is finalised. This User Guide text box should also be deleted before releasing this template to the market.
- Parts of the template contain suggested wording that can be used to input key information. These are examples only and you should update or amend each section as required to suit your requirements.
- If you require assistance in using this Specification template please contact your public authority's procurement team or contact Procurement Services SA at contact@procurement.sa.gov.au

Acknowledgement - Parts of this template have been adapted from the following documents:

1. *Developing specifications*, State of Queensland (Department of Housing and Public Works) 2018.
2. *Specification writing – Goods and services procurement guide*, Victorian Government Purchasing Board (Department of Treasury and Finance) December 2018.



Value for
money



Creating
jobs



Innovation and
new business



Climate smart
economy



Government
of South Australia

<Insert Name of Public Authority>
("Public Authority")

Invitation to Supply

<or>

Expression of Interest <delete one>

<Insert Procurement Title>

Part B: Specification – Goods and/or Services

TABLE OF CONTENTS

1.	INTRODUCTION	4
1.1	Purpose	4
1.2	Background	4
2.	REQUIREMENTS – GOODS AND/OR SERVICES.....	4
2.1	Procurement Objectives	4
2.2	Scope	4
2.3	Mandatory Requirements	4
2.4	Requirements	5
2.5	Timeframes	6
2.6	Performance.....	6
2.7	Contract Sites/Delivery Locations.....	6
2.8	Contract Management	6
2.9	Confidentiality.....	6
3.	PUBLIC AUTHORITY SPECIFIC REQUIREMENTS.....	6
4.	TRANSITION	7
4.1	Transition In.....	7
4.2	Transition Out.....	7
5.	GLOSSARY	7
6.	ATTACHMENTS.....	7

1. INTRODUCTION

1.1 Purpose

Provide brief details about the purpose of the procurement and the objectives. Keep it short, avoiding jargon and acronyms.

The purpose of this procurement is ...

1.2 Background

Briefly explain the Public Authority's role and the policy and operational objectives to be met by the proposed procurement. This information will link the public authority's strategic objectives with the procurement outcome.

Describe any unique or pertinent factors about the conditions/environment which can affect the output, design or performance of the offered solution/ methodology.

Refer to other documents in order to avoid duplicating content from some or all of those documents. Include a list of each document stating the document name, the version number if applicable, and where a copy can be obtained. As a referenced document is incorporated into the specification, if only part of a document is relevant, refer to that part only.

The complete list of attachments is to be detailed in Section 6 Attachments.

2. REQUIREMENTS – GOODS AND/OR SERVICES

2.1 Procurement Objectives

The procurement objectives are ...

2.2 Scope

The scope should include a brief description of the requirement and the application, purpose or function of the goods or services required. A full description of each element summarised in the scope should be included in the Requirements section/s below.

Provide a summary description of the desired range and type of goods and services that are required. Identify what is out of scope and what the supplier is not required to do.

Complex specifications are more likely to benefit from a scope section than simple ones. However, even for simple specifications a scope may represent an effective way to highlight the main aspects of the requirement.

Consider writing the scope as a stand-alone statement of the requirement. A scope can be used in offer and contract documents as well as in an approach to the market.

Specify the period of the contract and whether it is intended to appoint a sole provider or establish a panel or standing offer arrangement. If it is unknown whether a sole provider or panel will be appointed, state that it will be dependent on the proposals received.

2.3 Mandatory Requirements

Detail mandatory requirements, if applicable.

These are yes/no scenarios where a failure to meet the specified requirement could impact the procurement outcome. Mandatory requirements may align with the mandatory criteria. For

example, a mandatory criteria may be willing to complete a pre-employment check. This will not need to be completed by a supplier prior to submitting a response, however, it will need to be completed prior to the commencement of service.

2.4 Requirements

Determine the type of specification to be used to enable the best outcome – functional, performance or technical. Describe in detail the functional, technical and performance requirements of the goods and services to be procured.

Specification Type	Description
Functional (outcome-based)	- Defines the function, duty or role of the goods and services. - Describes what the goods or services are broadly required to do/achieve. - Defines the task or desired result by focusing on what is to be achieved rather than how it is to be done. <u>Does not</u> describe the method of achieving the intended result. - Enables suppliers to provide solutions to a defined problem.
Performance (outcome-based)	- Defines the purpose of the goods and services in terms of how effectively it will perform identified targets. - Is an extension of a functional specification. - Defines the task or desired result by focusing on the minimum outputs required. <u>Does not</u> describe the method of achieving the desired result. - Allows suppliers to provide solutions to defined problems.
Technical	- Defines the technical and physical characteristics of the goods and services, such as dimensions, colour, exterior finish, design specifics, physical properties. - Used when functional and performance characteristics are insufficient to define the requirement.

Provide adequate details to describe the requirements to allow suppliers to develop an accurate cost to deliver the requirements and eventually for the contract manager to manage contract delivery. Describe the various services (all of the tasks, activities and overall work (including deliverables) that are described in or reasonably inferred by the contract) and deliverables (the reports, documents and other items that the supplier will develop and deliver/hand over to the public authority as a requirement of the contract).

Ensure the requirements link directly to the evaluation criteria and weightings and the information requested in Part D – Supplier Response Form.

Document other explicit requirements, as applicable. The following examples are not exhaustive and may not apply to all procurement processes.

Technology, systems and management techniques

State where the public authority expects improvements in the use of technology, systems and other management techniques.

Suppliers should be encouraged to provide innovative solutions when making offers.

Data management, cyber security and the management of Intellectual property should be identified if applicable.

Records management

Record management includes the creation and control, storage, security, access and disposal.

Detail any record management requirements.

Quality requirements

Detail appropriate quality assurance processes to be undertaken by the supplier

2.5 Timeframes

Specify the proposed delivery schedule, including commencement date, milestones, completion of deliverables, and a completion date.

2.6 Performance

Detail the performance measures and benchmarks that will be monitored during the period of the contract. Specify the key performance indicators (KPIs) or targets for the procurement.

Consider not just how performance will be measured, but who will measure performance and how non-performance will be managed.

2.7 Contract Sites/Delivery Locations

Explain the proposed location or locations where the contract goods and services are required to be delivered.

2.8 Contract Management

Explain the contract management arrangements to be established by the public authority for it to manage its responsibilities under the contract and also the requirements for management of the contract by the supplier.

State the level of contract management that will take place, and what the supplier needs to do to facilitate the internal management of the contract.

2.9 Confidentiality

Explain any specific confidentiality requirements or sensitive documents, information or aspects such as site access which the supplier needs to recognise.

3. PUBLIC AUTHORITY SPECIFIC REQUIREMENTS

If your Public Authority has no agency specific requirements, insert “Not applicable”.

If your Public Authority has a working with children and vulnerable people policy, please include the following policy statement:

The Public Authority requires that all persons involved in the delivery of goods and services at sites where children, persons with a disability, the aged or other vulnerable people may be present have agreed to a screening assessment by the DHS Screening Unit. In addition, the supply contract may include a “Child Safety” clause which if breached may result in termination of the supply contract.

If your Public Authority has a respectful behaviours policy or is working towards being accredited as a White Ribbon Workplace, please include the following policy statement (otherwise remove the statement). **Note:** this statement should not be included when procuring goods or services from the Not-for-Profit Sector.

The Public Authority requires that all contracts with suppliers of goods and services include a “Respectful Behaviours” clause that acknowledges the Public Authority’s commitment to a policy of zero tolerance to violence against women in the workplace and the broader community and requires the Suppliers’ personnel to comply with the Public Authority’s instructions, policies, procedures and guidelines regarding acceptable workplace behaviour.

If your Public Authority has any other relevant policies, please include details here.

4. TRANSITION

Explain if there are any specific requirements to address the periods of transition - both transition in at the start of the contract or transition out at the end of the contract.

This section is optional and may not apply to all procurements.

4.1 Transition In

Ensure requirements are addressed before and at the time of contract commencement.

4.2 Transition Out

Ensure requirements are addressed at the end of the contract.

5. GLOSSARY

Define terms and acronyms that have been used in the specification that may not be clear to suppliers. Use these terms consistently throughout the market approach documents.

6. ATTACHMENTS

Provide a complete list of attachments, if any, that need to accompany the specification. These may include technical drawings, photographs, detailed spreadsheets, etc.

For all attachments used as part of a specification, check to see if ownership of the copyright should reside with the department/agency. If in doubt seek both technical and legal advice. Australian Standards for drawings exist and these should be consulted when preparing and revising drawings.