



SELF EVALUATION CHECKLIST

NAME OF AGENCY: **[Name of Tendering Agency]**

PROJECT TITLE: **[Project Title]**

The Tendering Agency or Principal must complete this checklist to ensure a tender is in line with tendering requirements. If at any point you answer NO, take appropriate steps to remedy the situation and when the answer becomes YES, then continue. Otherwise please include justification for exclusion. This checklist must be submitted to the tender secretariat with your tender document for review prior to advertising. The tender secretariat must endorse this checklist before you may proceed with advertising.

REFERENCE TO POLICY	REFERENCE TO RFT TEMPLATE	MANDATORY TENDER REQUIREMENTS FOR PURCHASES	COMPLETE	INCLUDE PAGE NUMBER AND SECTION OR JUSTIFICATION FOR EXCLUSION	FOR TENDER SECRETARIAT USE ONLY
Schedule One, 12.1.1. a)	Pg. 1 Cover Page	Cover sheet containing basic information – tender title, tender reference number, name of tendering agency, date release.	YES NO		
Schedule One, 12.1.1. b)	Pg. 1 Cover Page	The name of the agency responsible for the tender must be clearly stated.	YES NO		
Schedule One, 12.1.1. c)	Pg. 5 Tender Closing Time Pg. 6 Submission of Tender	The venue for lodgement, date and time for closure of acceptance of Tenders.	YES NO		
Schedule One, 12.1.1. d)	Pg. 5 Tender Closing Time	It is the tenderer’s responsibility to ensure that their proposal reaches the designated venue by the specified date and time.	YES NO		

[Name of Tendering Agency] Request for Tender – [Project Title]

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Schedule One, 12.1.1. e)	Pg. 6 Submission of Tender Pg. 9 Mandatory Conditions (1)	Tenders must be completed in the format contained in “Attachment #”. If offers do not comply with the format contained in Attachment #, they will be deemed non-compliant and may not be accepted.	YES NO		
Schedule One, 12.1.1. f)	Pg. 9 Mandatory Conditions (3)	It must be clearly stated that all tenders and related documentation may be presented in the English or Maori language. Tenders in Maori must be translated into English.	YES NO		
Schedule One, 12.1.1. g)	Pg. 5 Introduction	It is the tenderer’s responsibility to carry out any site visits in order to assess the true costs to complete the project where necessary.	YES NO		
Schedule One, 12.1.1. h)	Pg. 5 Introduction Pg. 9 Mandatory Conditions (4)	It must be clearly stated whether tenders will be accepted for all or part of the specifications listed for the tender. The specifications may include statements such as: ‘The Tenderer must tender to provide services or supply materials for the whole contract works...’ or ‘Tenderers may tender to supply services or materials for sections of the entire specifications but must tender for the whole requirements of that section.’	YES NO		
Schedule One, 12.1.1. i)	Pg. 8 Non-Resident Tenderer	Notes the need for compliance with Business Trade and Investment Board (BTIB) requirements. “In order for foreign companies to carry on business in the Cook Islands, an application must be made to the Business Trade and Investment Board for registration as a foreign enterprise. Any fees associated with the registration are to be covered by the tenderer.”	YES NO		

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Schedule One, 12.1.1. j)	Attachment 2 – Tender Forms to be Submitted	A template for costing and other details should be prepared for tenderers to complete and submit. This will ensure that the tenderer submits the required information and that all tenders are consistent for the purposes of evaluating the tenders.	YES NO		
Schedule One, 12.1.1. k)	Pg. 6 Submission of Tender Pg. 9 Mandatory Conditions (5)	Whether electronic and hard copy, or electronic only or hard copy only tenders are permitted.	YES NO		
Schedule One, 12.1.1. l)	Pg. 4 Further Information of Clarification	Negotiations will not be permitted between the tender/evaluation team and any prospective suppliers during the advertising period.	YES NO		
Schedule One, 12.1.1. m)	Pg. 7 Selection Process Attachment 3	Information on how the tender will be assessed and how the successful tenderer will be chosen must be included.	YES NO		
Schedule One, 12.1.1. n)	Not in Template	The tender documents must include, if applicable, a request for details of financial or contractual requirements that the tenderer will apply if awarded the tender.	YES NO		

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Schedule One, 12.1.1. o)	Pg. 7 Selection Process Attachment 3	If there is likely to be a short listing of tenderers, then terms and conditions for this process must be clearly stated.	YES NO		
Schedule One, 12.1.1. p)	Pg. 8 Notification of Acceptance	The process for informing the successful tenderer must be clearly stated.	YES NO		
Schedule One, 12.1.1. q)	Pg. 7 Notification of Acceptance	The process for informing unsuccessful tenderers, if applicable, and a statement that they have the right to make a complaint under the complaints process must be stated.	YES NO		
Schedule One, 12.1.1. r)	Pg. 8 Notification of Acceptance	There must be a statement of the agency's intentions to contact referees, competitors or customers to enquire about the performance of the tenderer.	YES NO		
Schedule One, 12.1.1. s)	Pg. 8 Notification of Acceptance	Tenderers are entitled to the release of their evaluation report on request. Any requests for evaluation reports of other tenders must be processed under the Official Information Act 2008.	YES NO		
Schedule One, 12.1.1. t)	Pg. 7 Probity	That no gifts or entertainment of any nature will be permitted between any parties involved throughout the tender process, including: tenderers or potential tenderers, tender team members, evaluation team members, the Head of Agency, or any other member or organisation that may have an involvement with any aspect of the tender process.	YES NO		

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Schedule One, 12.1.1. u)	Pg. 9 Mandatory Conditions (6)	Tenders must be inclusive of freight landed in Rarotonga (or the relevant island) for ease of comparing local and overseas tenders.	YES NO		
Schedule One, 12.1.1. v)	Not in Template	At the conclusion of the tender process the outcome must be published on the procurement website showing the names of the successful tenderer.	YES NO		
Clause 1.8.2	Pg. 6 Conflict of Interest Declaration Attachment 2	All tender bids should be accompanied by a conflict of interest declaration by those representing the bid.	YES NO		
Clause 4.6.5	Pg. 6 Submission of Tender Pg. 9 Mandatory Conditions (5)	Tender documents must include an approved statement explicitly stating that e-tenders are acceptable to the agency and describing how e-tenders will be submitted.			
Clause 5.6	Attachment 1	Specifications completed.	YES NO		
Clause 5.7.3	Attachment 4	Contract completed and consistent with RFT specifications	YES NO		
Clause 5.7.4	Attachment 2	Price schedules completed.	YES NO		

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Clause 5.7.5	Pg. 9 Mandatory Conditions (7) Attachment 2	All tenders must clearly show the VAT exclusive price, the VAT amount and a total inclusive of VAT amount. All values must be shown in New Zealand Dollar (NZD) currency.	YES NO		
Clause 5.7.7	Attachment 3	Evaluation criteria completed.	YES NO		
Clause 5.11.3 a)	Attachment 3	Tenders must be evaluated using the weighted scoring method.	YES NO		
Clause 5.11.3 b)	Attachment 3	If a request for tender is able to be carried out by a locally established company or if the request for tender has the ability to use local labour/resources, part of the evaluation criteria should include a weighted scoring for locally established companies.	YES NO		
Clause 5.11.3 c)	Attachment 3	The format of the evaluation criteria should be set out in a way that will allow each evaluation team member to allocate points to a tenderer for each category assessed.	YES NO		
Clause 5.11.3 d)	Attachment 3	If an agency has provided a contract with the tender documents, the tenderers acceptance of the terms of that contract must be assessed and weighted positively. A tenderers non-acceptance of the terms of the contract by making any amendments to the terms must be assessed and weighted negatively.	YES NO		

REFERENCE TO POLICY	INTERNAL CHECKS	COMPLETE	COMPLETED BY	FOR TENDER SECRETARIAT USE ONLY
Clause 5.3	Financial Review	YES NO		
Clause 5.4	Head of Agency – Written Delegated Authority	YES NO		
Clause 5.5	A tender team has been established.	YES NO		
Clause 5.6	Technical Review	YES NO		
Clause 5.7.3	Legal Review	YES NO		

TENDER SECRETARIAT USE ONLY

<input type="checkbox"/> Tender Template Used <input type="checkbox"/> Previous Ministry Template Used <input type="checkbox"/> Other Template Used	<input type="checkbox"/> Retender Waiver <input type="checkbox"/> Closed <input type="checkbox"/> Open <input type="checkbox"/> Electronic Submission	<i>Date Endorsed:</i> <input type="text"/>
<i>Reference No:</i> <input type="text"/>		<i>Submitted By:</i> <input type="text"/>
		<i>Approved By:</i> <input type="text"/>

Please remember all tenders must be advertised for a minimum of 10 working days in at least 3 different public media sources. A tender log form must be kept up to date and all notices and clarifications should be circulated.