



Handbook



tefma

Procuring the future

workshop

5 & 6 July 2010, The University of Sydney

establishing sustainable procurement within the tertiary sector



Welcome



Matt Smith,
University of
Tasmania,
President
TEFMA

Welcome to Sydney
colleagues! One of the great

strengths of the TEFMA organisation is our ability to anticipate member requirements and then to design and deliver cutting edge professional development opportunities to our membership. This workshop will be another of those opportunities.

Of course TEFMA cannot provide these opportunities without a great deal of support from our sponsors and speakers. TEFMA is fortunate to attract the good will of many industry experts who support our sector as we face today's challenges.

Member feedback at the Carbon Footprint Workshop in Noosa last year has informed this workshop's program. You identified procurement as being the starting point of delivering improved sustainable performance through operational contracts. This workshop will be your opportunity to gain the latest insights from industry experts, network with your colleagues in other Universities who are facing similar challenges and to use each other's experience to enhance your own professional development.



Alex Hanlon,
Convenor,
Organising
Committee

Welcome to the Procuring the
Future workshop. On behalf
of the Organising Committee

can I say we are looking forward to two jam packed days full of networking and discussion. The workshop was designed by your colleagues to assist you to access the best industry expertise with a view to improving your sustainability practices from procurement to contract and through to implementation.

Of course it takes a lot of work for these workshops to come together and I would like to thank the members of the Organising Committee all of whom have put in a big effort to ensure that your workshop experience is the best it can be. I'd also like to thank Leishman Associates who keep us focused and on track and provide the foundation to every TEFMA workshop event.

And a very big thank you to our speakers and facilitators all of whom contribute their time and energy to our association to share their valuable insights with us.

We hope that you will take full advantage of this networking opportunity and catch up with old known colleagues and introduce yourself to new colleagues.

Enjoy!

Tour The University of Sydney Law School

Monday 5 July 2010 at 5.15pm
Meet at the registration desk





Organising Committee

Alex Hanlon (Convenor)

Product Manager, Tririga Software
Whitesmiths

Pam Esdaile

Manager, Programming & Reporting
The University of Sydney

Bart Meehan

Associate Director - Facilities and Services
The Australian National University

Bronwyn Rice

Procurement Manager
The University of New South Wales

Conference Managers



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workshop program

Monday 5 July 2010, The University of Sydney, Darlington Centre

- 08.00 Registration opens
- 08.45 Acknowledgement of Country
Peter Minter, Lecturer,
Koori Centre
- 09.00 Welcome to The University of Sydney
Dr Michael Spence, Vice-Chancellor,
The University of Sydney
- 09.15 Introduction to Workshop
Matt Smith, TEFMA President
- 09.30 **Keynote Speaker:** The challenges of shifting
organisational thinking to implement sustainable
outcomes
Samantha Mostyn, Director, Institute for
Sustainable Solutions, The University of Sydney
- 10.30 Morning refreshments
- 11.00 **Keynote Speaker:** Framing the path of
sustainable procurement
Suzanne Grob, Principal, Procureability
Suzanne's presentation will outline the role
and impact of organisational purchasing on
sustainability
- 11.45 Procurement framework & benchmarking
Jan Rose, Higher Education Services
Aligning Facilities Management and Procurement
sustainability aims
- 12.30 Lunch
- 13.30 Integrating sustainable procurement practices
into your existing processes
Greg Hanna, Capital Insight
What you need to do differently and how to write
a sustainable specification
- 14.30 Green Cleaning at UNSW, a case study in
sourcing and implementing a sustainable service
model.
Edgar Atienza, Senior Procurement Specialist,
The University of Sydney
Bronwyn Rice, Procurement Manager,
University of New South Wales
- 15.30 Afternoon refreshments
- 16.00 Panel Discussion: What's happening in the
cleaning & waste markets?
Facilitator: **Bronwyn Rice** UNSW
Panel: **Fiona Martin**, UTS
John Sullivan, ANU
Tony Candy, SITA
George Diaz, Perpetual Property Care
Anne Prince, APrince Consulting (APC)
How can universities and suppliers work together
to achieve sustainability targets?
- 17.00 Workshop close
- 17.15 TOUR: Law Building and Public Domain
- 18.00 Pre-Dinner Drinks – Darlington Centre
- 19.00 Workshop Dinner – Forum Restaurant,
Darlington Centre



Tuesday 6 July 2010, The University of Sydney, Darlington Centre

- 08.00 Registration opens
- 09.00 Welcome to Day Two
- 09.15 **Keynote Speaker:** What does a delayed Emissions Trading Scheme (ETS) mean for a future cost of carbon, how will this impact the national energy market and future energy procurement?
Travis Hughes, AGL Energy Limited
- 10.15 **Morning refreshments**
- 10.45 Sustainable Procurement tools: Third party certification schemes
Seb Crawford, Project Manager, The Watershed
A look at Good Environmental Choice Australia, Forest Stewardship Council, Fair Trade, The Good Business Register, EcoBuy. What training on these systems can you access?
- 11.45 Next generation procurement: Productivity gains using BIM and GreenTag
David Baggs, Technical Director & Principal Consultant, Ecospecifier Global
- 12.15 **Lunch**
- 13.00 Procuring energy: What works and what doesn't in energy procurement
Peter Weightman, Procurement Australia
Andrew Smith, Swinburne University of Technology
- 14.00 Panel Discussion: What's happening in the energy market?
Facilitator: **Bart Meehan**, ANU
Panel: **Chris Collins**, UNSW
Hamid Popal, Renewable Intelligence
Andrew Ostoja, Big Switch
Christopher Wilson, Carbon Planet
- 14.45 **Afternoon refreshments**
- 15.15 The Future of Sustainability reporting to TEFMA
The TEFMA Sustainability Scorecard
Andrew Smith, Swinburne University of Technology
Bart Meehan, Australian National University
- 16.00 Official Close
Matt Smith, TEFMA President



Keynote Speakers

We have selected the very best sustainable procurement practitioners to add their expertise to this TEFMA Workshop.

Dr Michael Spence Vice-Chancellor and Principal The University of Sydney



Dr Michael Spence took up his appointment as Vice-Chancellor and Principal of The University of Sydney on 11 July 2008.

Dr Spence is an alumnus of the University, having graduated with First Class Honours in English, Italian and Law (BA (Hons)'85 and LLB (Hons)'87). Before leaving for the University of Oxford in 1988 to undertake doctoral studies, Dr Spence lectured in Law at the University and also worked for the Australian Copyright Council.

At Oxford, Dr Spence obtained his DPhil and continued to develop his career there over the next 20 years. He became a Fellow of St Catherine's College and a Lecturer of the University of Oxford in 1992. In 2005 he also obtained a Postgraduate Diploma in Theology from the University of Oxford.

Samantha Mostyn Institute for Sustainable Solutions The University of Sydney



Ms Sam Mostyn is currently the Director of the Institute for Sustainable Solutions.

Sam has enjoyed a diverse and high profile career. She has been in leadership roles in law, financial services, insurance, telecommunications and

broadcasting organisations, complemented by diverse interests and non-executive directorships in sport, indigenous affairs and reconciliation, medical research, the creative and cultural industries including arts and museum, and non profit and social entrepreneurship.

Sam serves as a member of both the NSW and QLD Climate Change Councils, and chairs the Stakeholder Advisory Council of the Climate Adaptation Flagship a collaboration between CSIRO and the Federal Department of Climate Change. In 2008, she facilitated the Climate Change stream of discussions at the Prime Minister's 2020 Summit in Canberra, and most recently presented the business case for action at the NSW Premier's Green Skills Summit in Sydney.

Sam has been involved in a number of initiatives designed to build respect and inclusion for Australia's indigenous people. In addition to serving on the board of Reconciliation Australia, she has worked with many organisations to develop indigenous employment and leadership programs, and acts as a mentor to a number of indigenous leaders and entrepreneurs. Through her involvement in the AFL she has supported the increased focus on reconciliation through sport.



Dr Suzanne Grob

Principal Procureability



Dr Suzanne Grob was recently awarded a PhD for her thesis examining the implementation of sustainable procurement in public and corporate organisations in Australia. Since training as an architect Suzanne has had several management roles gaining experience in strategy formulation, corporate and business planning. Over the past eight years she has had an instrumental role in public sustainable procurement at the state and national levels. She is currently the Principal of Procureability a small consultancy specialising in sustainability and procurement projects and research. Suzanne chaired the working party to develop the Australia and New Zealand Government Framework for Sustainable Procurement on behalf of the Australasian Procurement and Construction Council and went on to project manage some of the implementation projects.

ABSTRACT:

Framing the path of Sustainable Procurement

Suzanne's presentation will outline the role and impact of organisational purchasing on sustainability. Sustainable procurement moves the decision making process beyond green and the bottom line by considering environmental, economic as well as social aspects. She will also present several frameworks developed for sustainable procurement and discuss their suitability to the tertiary education sector. One of these is the Australia and New Zealand Government Framework for Sustainable Procurement and the work that has flowed from the implementation projects undertaken by the Australasian Procurement and Construction Council.



Travis Hughes

Travis Hughes, AGL Energy Limited



Travis Hughes joined AGL in 2009 in the role of Strategic Advisor in the Carbon Management Services (CMS) business. Travis works alongside CMS project and technical streams to assist AGL's major customers understand and manage carbon risk, and identify innovative ways to head towards sustainability.

Travis is a carbon management specialist, with over 10 years experience in greenhouse gas management, assessment, emissions estimation and verification.

Between 2002 and 2006, Travis was based in the UK and consulted to the electricity supply and oil and gas sectors with respect to managing obligation and identifying opportunities under the UK and EU Emission Trading Schemes (ETS).

ABSTRACT:

What does a delayed ETS mean for a future cost of carbon, how will this impact the national energy market and future energy procurement?

The recent announcement by the Rudd Government to delay the Carbon Pollution Reduction Scheme (CPRS) until 2012 increases uncertainty regarding the impact of a carbon price applied to the Australian economy in general terms, and more specifically, on future energy procurement.

Nonetheless there remains many examples of existing 'green' regulation (for example the Renewable Energy Target), and societal trends (for example GreenPower and uptake of small scale solar systems) which reflect either explicitly or implicitly, a cost of carbon.

From a business and organisational perspective, proving the business case for sustainable/ green/ environmental initiatives including energy efficiency programs, has always required consideration of regulatory uncertainty. The delayed ETS impacts upon the business case of these initiatives – but does not remove it.

This presentation will provide context to the delayed ETS through discussion of the wholesale energy market, definition of an emissions trading scheme and the consequent impact of its delay (both domestically and in an international context).

The presentation will also provide some options for businesses to improve sustainability whilst managing the risks presented by the uncertain regulatory environment.



Session Presenters and Facilitators

Bronwyn Rice

Procurement Manager, Finance Division
The University of New South Wales

Bronwyn Rice has been working in the area of environment and sustainability for over 20 years starting out as a landscape and Permaculture designer. Bronwyn has qualifications in horticulture, landscape management and Permaculture along with a Master of Social Ecology in Organisational Development and more recently, Procurement Certification with the NSW Department of Commerce.

Bronwyn joined the University of NSW's Environment Unit as Green Office Coordinator with a major program area of promoting environmentally preferred procurement across the university. After a stint as Procurement Project Officer for Facilities Management Bronwyn took up her current role as a Procurement Manager with the UNSW Procurement Unit in July 2009.

ABSTRACT:

Green Cleaning at UNSW. A case study in sourcing and implementing a sustainable service model.

In this presentation Bronwyn and Edgar discuss the process of developing an innovative sustainability driven services specification and how this, coupled with robust contract management mechanisms, has delivered a 'green cleaning' supply that is both sustainability best practice and cost effective.

Edgar Aitenza

Procurement Specialist,
The University of Sydney

Edgar's current role at the University of Sydney focuses in managing spends across a diverse category range such as Cleaning, Imaging & Copy Devices, Energy and Leasing. Prior to this, he has worked in various procurement roles in industries such as IT, media and education.

Edgar holds a Bachelor of Science in Industrial Engineering from the University of the Philippines and a Master of Business and Technology from UNSW. He is an Associate Member of the Chartered Institute of Purchasing and Supply and is currently finishing a graduate diploma in Purchasing and Supply.



David Baggs

Technical Director & Principal Consultant
Ecospecifier Global

A multi-award winning eco-architect and author, David Baggs, delivers powerful presentations for industry and international conferences on green building and materials intelligence.

A vocal advocate, educator and guide in a world ready to be greener, David challenges the way for new frontiers of ecologically sustainable design to be realised, producing robust presentations that tap into major worldwide issues as well as his own significant experience and expertise developed over nearly 30 years in the Green Building and Product sector delivering world leading green projects.

ABSTRACT:

Next Generation Procurement: Productivity gains using BIM and GreenTag

The emerging use of Building Information Modelling (BIM) is generating significant productivity gains in the education and government sectors not only in the procurement of buildings but also in the management of facilities. GreenTag is ecospecifier's world first Green Building Council of Australia approved third party product rating certification system that is underpinned by a revolutionary new BIM based life cycle assessment (LCA) tool, LCADesign. This paper explores GreenTag, BIM, LCA and LCADesign to show the pathway to current and future productivity gains in facilities management.

Bart Meehan

Associate Director, Facilities and Services
The Australian National University

Bart Meehan is Associate Director, Facilities and Services, The Australian National University. He is responsible for the ANUgreen program, as well as coordinating campus sustainability initiative as part of several international networks in Europe, Asia and USA.

Bart is also a board member of the ANU Climate Change Institute, as well as being on the Board of TEFMA.

Andrew Smith

Director, Facilities and Services Group
Swinburne University of Technology

Dr Andrew Smith has been at Swinburne University of Technology since 2000, and has been in the role of Director, Facilities and Services Group since 2007. His portfolio has him responsible for the University's \$266M Capital Management Plan, Space Planning, University Security, Repairs and Maintenance and Timetabling.

Dr Smith's formal qualifications include a BSc(Hons) and PhD from the University of Melbourne. Dr Smith also has teaching and research experience at the University of Melbourne, prior to coming to Swinburne.

Dr Smith has been a TEFMA Director since 2009.



Christopher Wilson

Carbon Planet

Chris is responsible for greenhouse gas and energy efficiency assessments and specialises in providing Carbon Planet's clients with practical and sustainable energy efficiency and emissions reduction strategies.

Chris has several years experience in environmental science, as applied to the sustainability industry. Prior to joining Carbon Planet in 2007, he worked as an Energy Auditor for FieldForce Environmental Services.

Chris' approach focuses on implementing management systems to drive sustainability, addressing Triple Bottom Line (TBL) considerations through targeting key areas for change.

Chris holds a Master of Environmental Management from The University of New South Wales and a Bachelor's Degree in The History & Philosophy of Science from Griffith University. He is certified as an Associate Environmental Auditor through RABSQA (an international personnel and training certification provider) and a full Member of EIANZ, the professional association for Australasian environmental practitioners.

Greg Hanna

Education and Research Sector Leader Capital Insight

Greg is a member of TEFMA and has over 25 years experience in the construction and facilities industry. He is the Education and Research Sectors Leader for Capital Insight Pty Ltd, a specialist independent project management and advisory consulting firm.

Originally having trained and practiced as an architect in both private and public organisations, over the years

he has gained a greater awareness and appreciation for the dynamics and forces which govern large institutions. In the last ten years Greg has been working in private firms consulting in the fields of project management and strategic advisory services. Greg's clients have included The University of New South Wales, University of Technology Sydney, The University of Sydney, Taronga Zoo, Centenary Institute, Reserve Bank of Australia, Austrade, Newcastle Ports Corporation, Department of Immigration and Multi-Cultural Affairs, Sydney Airport, KPMG, IAG, Travelex, Allianz, Hutchison Telecom Australia, Deutsche Bank and Macquarie Bank.

Jan Rose

Higher Education Services

Leaving university with a double in Business & Information Systems, Jan's career was originally focussed in IT Systems, moving into Management and eventually her own consultancy company. Jan is a qualified and experienced Project Manager and has worked in areas as diverse as Federal Government, television, radio, engineering and the mining and exploration sector.

In 2006, Jan started to work with the Australian Procurement Network Consortium on behalf of HES as the Project Director for a benchmarking programme funded by DEEWR and involving 29 universities. The programme ran for 3 years and when it finished, Jan has continued to support the management for what is now the Australian Universities Procurement Network as it moves forward under a new model.



Seb Crawford

The Watershed

Seb has worked in environmental management for over 15 years. He spent 7 years working on climate change and energy issues with environmental NGOs such as Greenpeace and the Nature Conservation Council, followed by a number of years with the NSW Parliament working on environmental policy and legislation. More recently he established the Sustainable Choice program, a sustainable procurement program for NSW local government. He is currently the manager of the Watershed, a green living centre in Newtown that runs a range of sustainability initiatives for local residents and businesses.

ABSTRACT:

Sustainable Procurement tools: Third party certification schemes

This presentation will look at eco certification schemes as a tool for the procurement professional. It will examine the difference between independent third party eco labels based on life cycle assessment, certification schemes for single products, and green tick labels devised by manufacturers. The presentation examines the strengths and weaknesses of different schemes, environmental rigor and broader risk factors for the procurement practitioner to consider.

Peter Weightman

Procurement Australia

Peter is a Project Manager with Procurement Australia and facilitates as an agent for over 200 clients' Electricity and Natural Gas Contracts to Buildings and Public Street Lighting. Peter has eleven years experience in energy project management/marketing including, contract surveillance, administration, service management, records and data management & tendering. The contracts he facilitates focus on competitive price through a quality assured tender process, quality client support services including contract surveillance throughout the term of the contract and continuous improvement through best practice. His priority is to deliver desired outcomes and service in line with the clients' needs including "green options" by bridging the gap between the supplier and the client. Peter is a Level 3 Coach with extensive, hands-on experience in the AFL football industry at both AFL national and Victorian State levels as Senior Coach, Development Coach, Football Manager, Club Administrator, Recruiting Manager and Mentor.

Peter presents a proven excellence in leadership and management skills, demonstrated skills in team building and performance management, strong interpersonal and communication abilities, plus energy, optimism and the desire to be a member of an effective result driven team. Peter is a "thought leader" guided by a philosophy embraced by common sense, empathy with the client, hard work and integrity.



Panel Members

Fiona Martin

University of Technology Sydney

Fiona Martin is an environmental engineer who has worked in the environmental and sustainability sector for 15 years. Her experience includes the development and coordination of environmental management systems within the waste, electricity and construction industries. She has also worked as a Lead Auditor for ISO 14001 and ISO 9001 management systems for a major certification body, and more recently has focussed on green building and resource efficiency.

She currently works in the Program Management Office of UTS, where she manages the university's Environmental Sustainability Initiative, as well as overseeing the quality management systems associated with a construction program of almost \$1 billion value.

John Sullivan

The Australian National University

John Sullivan is the Manager of the Energy & Sustainability office at the Australian National University. The ANU covers an area of approximately 150 hectares and is located within the centre of Canberra City. The ANU provides a place of work and study for over 15000 staff and students. John works with the other Sustainability office members to administer the Environmental Management Plan aimed at reducing the environmental impact of the University's operation.

John has worked with the Facilities and Services Division for 20 years in all areas of Building maintenance and operation. Whilst working with the ANUgreen team he has developed the Universities award winning waste and

recycling programs, and works with project managers, students, academic, general and technical staff to allow for the technical and cultural changes required to reduce the university's environmental impact.

This activity over the years has led to the ANUgreen program receiving many major awards and a range of other accolades.

George Diaz

Perpetual Property Care

George Diaz is Managing Director of Perpetual Property Care.

Perpetual Property Care is one of two contractors implementing green cleaning at UNSW.

Anne Prince

APrince Consulting

Anne Prince has over 25 years experience in waste management at local, regional, state and international levels gained in Australia, Europe and Asia whilst employed in local government, community, commercial and industry sectors.

Anne started her own consultancy APrince Consulting now trading as APC Environmental Management in 1997 which undertakes a wide range of work for the private and public sector.

In addition to running her own consultancy Anne was appointed as the inaugural CEO of Australian Council of Recyclers in 2002 a position she held till 2009 when she was appointed to the Zero Waste South Australia board.



Tony Candy

SITA Environmental Solutions Australia

Tony has worked in the industry for a period of 9 years, all of which have been for SITA. During this time Tony has held positions of: Territory Manager, Business Development Manager, Key Accounts and NSW New Business Manager.

Tony has been employed in his current role of NSW Sales Development / Key Accounts Manager for a period of 3 Years.

Tony is responsible for developing new business on a state and national level, and for tender proposals and the implementation of the services to new clients as well as Account Management to a portfolio of major national clients.

It is Tony's responsibility to attend regular monthly business reviews with SITA customers, customer reporting and regular site audits to establish opportunities to reduce waste to landfill and costs through new technology.

Hamid Popal

Renewable Intelligence

Hamid Popal is the Managing Director of Renewable Intelligence Pty Ltd which he founded in 2005. Renewable Intelligence specialises in the development of long term energy and investment strategies for major users as well as energy companies and infrastructure funds.

Over the last five years Hamid has acted as commercial advisor to large energy companies and infrastructure funds related to over \$5B of energy projects and investments. Over the last 20 years Hamid has developed

co generation and renewable generation projects with investments exceeding \$500m.

Hamid has a deep knowledge of the Australian energy market, energy applications and renewable and low emission generation technologies.

Hamid is passionate about developing energy and investment strategies for major energy users and market players that will achieve commercial, environmental, security, operational and sustainability objectives over a 10 to 20 year horizon. www.renewableintelligence.com.au

Chris Collins

The University of New South Wales

Chris Collins is the UNSW Energy and Water Manager. He has an extensive background in renewable energy and energy efficiency having worked as a consultant in both private practice and at high levels within government. He is a professional engineer by training and is committed to using his technical background to improve UNSW's energy use.

Chris heads a team which has developed projects to improve existing energy use at the university by introducing a number of energy reducing initiatives. These include replacing halogen down-lights with more efficient CFLs and LEDs, better design of new buildings and fit-outs to improve thermal comfort, getting more on-site heat and power generation on-campus from cogeneration installations and from renewable energy, solar/gas water heating, wind and PV power projects.



What is sustainable procurement?



Sustainable development is “development that meets the needs of the present without compromising the ability of future generations to meet their own needs.”

Sustainable procurement is “a process whereby organisations meet their needs for goods, works and utilities in a way that achieves value for money on a whole life basis in terms of generating benefits not only to the organisation, but also to society and the economy, whilst minimising damage to the environment.”

Quick references:

Report of the World Commission on Environment and Development: Our Common Future (Brundtland Report)
www.un-documents.net/wced-ocf.htm

Australian Procurement and Construction Council www.apcc.gov.au

UK Sustainable Procurement National Action Plan www.defra.gov.uk/sustainable/government/documents/full-document.pdf
www.defra.gov.uk/sustainable/government/publications/procurement-action-plan/index.htm



Useful references

Procurement Framework & Benchmarking

From our workshop participants

- Institute of Sustainable Solutions
www.sydney.edu.au/sustainable_solutions/
- Australian Universities Procurement Network
www.hes.edu.au/page/aupn-initiative---forums/
- Australasian Procurement and Construction Council
www.apcc.gov.au/Resources/News/SustainableProcurement/tabid/197/Default.aspx
- The Watershed
www.marrickville.nsw.gov.au/environment/thewatershed/shopfront.htm
- Ecospecifier
www.ecospecifier.org

Other useful references

- New Zealand Ministry for the Environment Sustainable Procurement
www.mfe.govt.nz/issues/sustainable-industry/tools-services/subjects.php?id=29
- New Zealand Ministry of Economic Development
www.med.govt.nz/templates/ContentTopicSummary____29536.aspx
- New Zealand Sustainable Business Network
www.sustainable.org.nz/index.php?page=
- Australian Federal Department of the Environment, Water, Heritage and the Arts - Environmental Purchasing Guidelines
www.environment.gov.au/sustainability/government/purchasing/index.html
- Australian National Packaging Covenant
www.packagingcovenant.org.au/
- Australian Federal Department of the Environment, Water, Heritage and the Arts - National Waste reduction and purchasing guidelines
www.environment.gov.au/settlements/publications/government/purchasing/waste-reduction.html



Delegate Information & FAQs

To ensure that your visit to Sydney and experience of the Procuring the Future Workshop is as enjoyable as possible, this is a list of Frequently Asked Questions which will hopefully provide you with all of the information you need. We encourage you to read through this information before you attend, and let us know if we haven't answered something that you have been wondering about. A delegate list is available to download from the Workshop website.

How do I get from Sydney Airport to my hotel?

Airport shuttle: can be booked in advance online www.kst.com.au or contact +61 (2) 9666 9988, costs \$14 per person one way to/from the Domestic terminal. (Rate subject to change)

Taxi: approximately \$25 from the Domestic Terminal.

Train: approximately \$13.50 one way.

For more information, please visit www.cityrail.info

How do I pay for my accommodation?

To secure your booking, your credit card number was provided to the hotel you selected – no deposit was charged to your credit card at that time. On check out you will be responsible for payment of all nights' accommodation and any incidentals. If you arrive 24 hours later than your indicated arrival day you may find that your card has been charged with a fee by the hotel. If you have any queries relating to your accommodation booking please see the staff from Leishman Associates at the registration desk, or alternatively the staff at your hotel.

What & where is the workshop venue?

The 2010 TEFMA Procuring the Future Workshop will be held at The University of Sydney, Darlington Centre, 174 City Road.

Where can I park my car?

There is parking available in front of the Darlington Centre, the costs are as follows:

Weekdays: 6am – 3pm, Monday to Friday
\$24 flat rate (valid to 6am on the next morning)

Evening rates: 3pm – 6am Monday to Friday
\$6 flat rate (valid to following 6am only)

Where and when do I register?

The Registration Desk will open on Monday 5 July from 07.30am to 05.30pm. The Registration Desk will be located in the foyer of the Darlington Centre.

At registration you will receive a document wallet and your name badge. The Registration Desk will be open throughout the Workshop to assist delegates.

Name badge

Please wear your name badge at all times while attending the Workshop. It confirms your entry into sessions and social functions – and it will make it a lot easier for Workshop staff to identify you and for other delegates to identify you and vice versa.

Are morning and afternoon refreshments and lunches part of my registration?

Yes, all daily workshop catering – arrival tea and coffee, morning and afternoon refreshments and lunch are included in your registration.



I am a Speaker, what should I do?

Firstly, thank you very much for contributing to the program. Your involvement is very important, and our aim is to make sure you are well looked after and that your presentation runs as smoothly as possible.

All speakers should present themselves to the Registration Desk at least 2 hours prior to their scheduled presentation time, to upload their presentation. Speakers are also requested to assemble in their session room 10 minutes before the commencement of the session, to meet with their session chair and to familiarise themselves with the room and the audio visual equipment.

I have special dietary requirements – will I be served the correct food?

The caterers at each function have been advised of your special dietary requirements. Please remind the staff as they come to serve you of your requirements.

Can I book additional tickets for the Workshop Dinner?

Yes you can. The Workshop Dinner is included in the cost of a full Workshop registration – so there is no need to book additional tickets.

Tickets are available for partners or other accompanying persons by contacting Leishman Associates.

The cost is \$115.00 for the Workshop Dinner. **IMPORTANT:** Where possible this should be done prior to your arrival in Sydney.

Tour of Law Building and Public Domain: 5.15pm – 6.00pm, 5 July

You will view the new Law building with state of the art research and learning facilities.

Assemble at the registration desk at 5.15pm for departure.

Pre – Dinner Drinks: 6.00pm – 7.00pm, 5 July

The Pre-Dinner Drinks will be held in the foyer of the Forum Restaurant.

Workshop Dinner: 7.00pm – 10.00pm, 5 July

The Workshop Dinner will be held at the Forum Restaurant within the Darlington Centre.

IMPORTANT: Please advise Leishman Associates if you can not attend the dinner.

brigitte@leishman-associates.com.au or +61 3 6234 7844

Hopefully this information will help you plan for and enjoy your experience of Sydney at the TEFMA Workshop. We look forward to welcoming you.

Should you have any queries, please contact a designated member of our team.

Workshop Manager

brigitte@leishman-associates.com.au

Registration / Accommodation enquiries

nicole@leishman-associates.com.au

Sponsorship enquiries

natasha@leishman-associates.com.au





tefma

Procuring the future

Templates

Procurement reference documents provided by
your colleagues in other Universities.



Generic Procurement Plan template

This plan outlines the key steps for a sourcing project. Simple low risk projects may not need elaborate answers to every step, but each step should be given some consideration.

The template does not provide specific sustainability information, as each Good or Service has its own particular sustainability performance criteria.

Name of procurement project and corporate file number

Desired procurement objectives

The objectives ultimately provide the assessment as to the success of the procurement or otherwise.

Invitation Document type to be used

In all cases for FM procurement, documents will be based on FM templates, such as the FM-Request For Tender template.

Procurement timetable

Determine key milestones and deadlines around which procurement activities are scheduled.

Contract value and term

Determine the term of the contract and extensions at what interval (eg 3yrs +1+1, or 5yrs +2+2) per annum and total contract value over the term of the contract, including extensions.

Required approvals

Level of delegation required to approve funds and what procedures apply at this level of delegation (eg submission to Finance Committee, Memo to Chief Operating Officer, etc.)

Procurement rationale

Attach documents to support approval, which must include (but are not necessarily limited to):

- Business Case
- Cost Analysis
- Risk Assessment
- Project approvals
- Pre-tender estimates

Method of procurement

- Request for quotation if under \$100,000.00.
 - o Each university sets its own value threshold for the method of Procurement. The progression is usually 1. verbal quotes; 2. written quotes; 3. Request for Tender.
- Competitive Tender if over \$100,000.00;
 - o Open single or multi-stage, selected or pre-qualified vendor process. Include rationale for basis of method, for example, if pre-qualification include details of the basis upon which vendors are pre-qualified; should demonstrate the proven performance, financial and technical capacity of the vendor.
- Market research that may be required.

Project risk assessment

Risks associated with the procurement of the goods or service; and the selected method of procurement. Include mitigation strategies when required.

Some typical risks might include:

- Appointment of a suitable organisation with sufficient lead time for a smooth transition on to site;
- Change processes underway across the university; people in key roles leaving, changed procedures and delegations;



- Project program meets required approval deadlines, eg Finance Committee
- Ability to sufficiently document requirements of good or service to ensure adequate response from the market.

Quality assurance (project management)

- Internal document version and approval control mechanisms;
- Internal document naming protocols

Quality assurance (contract management)

- Management systems required of suppliers, or accreditations required, for example
- ISO 9001:2000, ISO 14001:2004;
- Any systems of measurement, analysis and improvement to be employed (eg audits, benchmarking, performance reviews, etc).

Terms and conditions

If the Procurement Plan proposes to use something other than the FM RFT template, then these requirements must be covered off in the documentation to be issued and university legal approval sought.

- Instructions to Respondents provides information on how, when, where and in what format responses are to be submitted;
- Commercial Conditions include clauses on confidentiality, conflict of interest, warranties, terms of payment, right to negotiate, etc. It is essential if any special terms and conditions are proposed (eg fixed price, Free in Store delivery, warranty to include servicing on site) these are included with the RFT or RFQ.
- The Proposed Agreement is also attached to the RFT / RFQ. The Procurement Plan identifies the Solicitor / Legal Advisor who will draft the agreement and allows sufficient time for legal review.

Probity issues and management

Includes for example:

- Adherence to relevant approved Tendering Policy and associated procedures.
- Use approved FM templates.
- Membership of Project Control Group or Steering Committee;
- Approvals processes and milestones, including capacity to proceed to contract;
- Membership of Tender Evaluation Panel;
- Appointment of a Probity Advisor for high risk, high profile projects.

Personnel and stakeholders

- Identifies key stakeholders and critical personnel for project execution.
- Determines method by which adequate input will be obtained on technical and commercial requirements of the service or goods from key stakeholders.

Strategies for briefing potential bidders

- Whether a pre tender site visit and briefing will be provided, whether the briefing is mandatory;
- How inquiries over the tender period will be managed, for instance a special purpose email address may be established for the duration of the tender.

Resource requirements

- Internal: resource commitments from the unit leading the procurement (development of RFT documentation, administration, record keeping, filing, submissions and approvals, secretariat for panels and PCG) and others (eg participation in Evaluation panels, stakeholder workshops, venues, funding).
- External: Engagement of consultants, including legal advice for drafting the contract and throughout negotiations, subject expert advice, specialised equipment, etc.



Relationships and dependencies between various procurement related activities

- Identifies critical relationships and dependencies requiring anticipation and management through the project program, risk assessment, approvals, absence due to leave, etc.

Tender Evaluation Plan

- This plan sets out the method and criteria to be used in the evaluation process and refers to the desired objectives of the Procurement. The Tender Evaluation Plan should be prepared prior to inviting Tenders.
- Evaluation criteria should conform to the FM Tendering Policy, with a priority on value for money.
- Criteria are published with the RFT or offer documents, but do not include weightings.
- The evaluation criteria establish the information sought from Respondents and so should be clarified prior to issuing the RFT.
- The evaluation method establishes the way the information will be assessed; including procedures and briefings for evaluation panels, whether short lists will be derived and at what step, Vendor interviews, use of spreadsheets and/or hard copy workbooks to record evaluation panel members scoring.
- Provision should be made to collect and keep on file notes made by individual Tender Evaluation Panel members, as these may be required at a later date, especially if an unsuccessful Tenderer disputes the outcome.
- The Tender Form sets out returnable schedules that gather information to satisfy the evaluation criteria in a form that allows like for like comparison between Tenderers.

- Relevant standard of performance, incentives and disincentives
- Identifies relevant benchmarks, industry standards and other mechanisms, such as Key Performance Indicators by which it is intended the contract will be managed.
- Preliminary assessment for incentives and disincentives, or penalties, by which to encourage continuous improvement in the delivery of the service or goods over the term of the agreement.

Appropriation approvals and processes to support whole of life for the project

- Anticipates end of life issues and actions, such as specialised disposal requirements (eg hazardous and toxic materials, decommissioning major plant).
- Considers disengagement / end of contract deliverables and associated liquidated damages if appropriate.



Green Cleaning Specification

UNSW Facilities Management RFT Specification 2008

Overview

Sustainability and Environmentally Preferred Cleaning Services (aka 'Green Cleaning'):

Green Cleaning is commonly defined as "cleaning to protect health without harming the environment".

Green Cleaning utilises cleaning methods, materials and equipment that improve the health of buildings through improved indoor air quality (IAQ) and minimise impacts on the environment. This means more than just substituting for chemicals. Methods include preventing dirt from entering buildings (outside influence of Contractor), using efficient cleaning methods that dramatically minimize chemical use, using efficient product dilution control systems, selecting high-filtration vacuum systems, minimizing waste through reduced packaging and by utilizing reusable products such as microfiber cloths.

Australian and international standards referenced in the development of the specifications and that will be referenced in the evaluation, selection and implementation of 'Green Cleaning' products and service delivery methods, include;

- Good Environmental Choice Australia (GECA) the standards program of the Australian Environmental Labelling Association (AELA), including:
 - o GECA 17-2006 for General Purpose Cleaners; and
 - o GECA 37-2008 for Cleaning Services;
- Green Seal – the most widely recognised environmental labelling standard active in the USA, such as for example, GS-42 Cleaning Services;
- Environmental Choice – the Canadian government's Eco-logo program of environmental certifications, such as CCD-148 Carpet and Upholstery Cleaners.

Continuous Environmental Improvement:

Service Providers have the potential to impact positively or negatively on campus wide environmental improvement strategies, such as energy and water conservation.

Specific Key Performance Indicators (KPI) have been identified for matters such as turning on and off lights, along with performance rating of equipment in use.

Respondents should indicate additional actions or initiatives they feel can contribute to achieving the university's strategic objectives, such as flexibility in rostering cleaners for either early morning or late evenings depending on what will provide optimum efficiencies for individual buildings.

These initiatives can be negotiated over the initial term for full implementation as the detailed requirements of the service are better appreciated and initiatives of the sort described are identified.

Length of Contract and cost savings expectations with regard to green cleaning:

Given the generous contract duration the University is expecting to gain cost savings including those achieved through performance benchmarking, and initiatives developed by the Service Provider through the increased use of technology and innovative operational processes and procedures throughout the term, including those associated with the staged implementation of 'green cleaning'.



Product and Equipment Selection:

The successful contractor/s will work with Facilities Management and Procurement to continually improve the selection and use of environmentally preferred cleaning products and methods. The intention of this is to:

- Build and share knowledge gleaned from the supply market;
- Avail ourselves of new products and methods as they become available;
- Continuously improve the health and safety of our environment for staff (including Contractor staff), students and visitors.

This activity will take various forms, including surveys and presentations from Suppliers of cleaning products and equipment. It is the expectation of UNSW that an appropriate level of management representation from the successful Contractor/s organisations will participate in these activities.

The use of cleaning products is a necessary component of achieving the required outcomes for the cleaning services. Ensuring minimal environmental impact through proper dilution rates, dwell times and application procedures is as critical to minimising impacts and costs as is the actual product selection. With this in mind, the rigour of Tenderers SOPs in relation to use of products and chemicals will be a factor in the evaluation of proposals.

'Green Cleaning' Technical Specification

Introduction

The green cleaning specification covers the following key areas:

- Cleaning products – chemicals and applicators
- Cleaning methods
- Cleaning Pilot Projects and transition to full roll-out.
- Cleaning equipment

Service Level Agreements detailed in the Statement of Requirements and their associated KPI's will continue to apply once the Green Cleaning model is campus wide.

Responses to materials and equipment proposed for green cleaning will be evaluated by application of the following process:

- Pass or fail against technical criteria set out in the Generic Specification and Appendix [insert number]
- Relative score against product requirements set out under the Generic Product Specification
- Relative score against equipment requirements set out in Appendix [insert number]
- Relative score on fitness for purpose of the product and equipment proposed

Generic Specification for Products

Green Cleaning Products should comply wherever possible with the following generic specification:

- Have clear labeling and information on use and disposal.
- Not be tested on animals
- Be designed for use in cold water in order to conserve energy.
- Be manufactured from renewable resources, such as bio-based solvents from citrus, seed, vegetable, and pine oils where ever available.
- Not contain substances classified as known or likely human carcinogens, mutagens, teratogens or other reproductive toxicants through the National Industry Chemical Notification and Assessment Scheme (NICNAS), including:
 - o Alkylphenol Ethoxylates (APEO) or their derivatives (APD)
 - o Ethylene diaminetetraacetic acid (EDTA) or its derivatives
 - o Class 1, 2a or 2b carcinogenic by IARC
 - o Any of the following risk phrases R42, R43, R48, R50, R51, R53, R58, R68



- o No more than 1% reactive chlorine compounds (sodium hypochlorite) or active chlorine compounds (benzalkonium chloride, triclosan).
- Not contain hazardous chemicals, including regulated hazardous materials (e.g. products classified as hazardous waste; products that trigger OHS hazard communication requirements).
- Contain low or no levels of phosphates.
- Contain low levels of or no volatile organic compounds (VOCs), ie not more than 5% by mass. For products sold in concentrate, the VOC concentration will be assessed at the solution dilution rate as directed on the label, at the strongest ratio if multiple rates are provided.
- Have a low risk of flammability e.g. flash point > 93.3 degrees C.
- Be of low toxicity in aquatic species such as fish or aquatic invertebrates, e.g. LC50 or EC50 > 10 mg/L (chronic) reported on MSDS or other product literature
- Not contain chemicals that are strong irritants (e.g. fragrances and dyes)
- Fragrance free unless deodorising action required
- Not contain the following fragrances (Common Name & CAS number):
 - Moskusxylene 81-15-2
 - Moskusambrette 83-66-9
 - Moskene 116-66-5
 - Moskustibetin 145-39-1
 - Moskusketone 81-14-1
- Be fully biodegradable.
- Be provided as a concentrate wherever possible.
- Have low environmental impact packaging (made from recycled content and be recyclable).
- Packaging must not contain chlorinated plastics (PVC, CPVC, PCE, CSPE, CR)
- Be accompanied by training and documentation provided by suppliers or manufacturers on efficient, environmentally aware, safe and effective use.

Product Information

When completing the 'green cleaning' schedule in the proposal, Tenderers should submit the following for each proposed product:

- Current Material Safety Data Sheet (MSDS);
- Product Use Instructions, including your SOP;
- Sample Product Label; and
- Specified Test Results (if available)
- Whether product is available in bulk and concentrate
- Dilution rate for strongest strength application
- Recycled content in packaging and / or resin identification code
- GECA certification if available.

Dispensing Systems for Concentrates:

For products intended for multiple uses that come in a concentrated state, Tenderers should provide information on the proposed dispensing system and any infrastructure requirements for installation and use.

Green Cleaning Methods

Best practice cleaning methods apply to both conventional and green cleaning. Through your SOP or other material, you should provide information on the following:

- Cross – contamination avoidance procedures and technologies;
- Correct dilution rate controls;
- Use of PPE;
- Labelling and communications; including MSDS in first language of staff members; pictograms and colour coding systems for staff with English as a Second (or third) Language (ESL).



Transition to Green Cleaning

Pilot Projects

Four buildings on the campus have been selected for piloting Green Cleaning. The agreement of the building occupants has been obtained and the specification developed with their input. These buildings will be serviced using this Green Cleaning specification at contract commencement.

- [insert name of building/s]

The pilot will be reviewed monthly between the Contractor, FM Cleaning Supervisor and the FM Procurement Officer, with a major review at 3 months to set the parameters for a final Green Cleaning Transition Plan at the 6 month mark to extend this cleaning model to additional buildings.

The aim is that the service delivery model will extend to all buildings under the Contract by the end of the initial term, if not earlier. The university appreciates some buildings will be more readily converted to Green Cleaning than others and will assist in developing a strategic sequence for the roll out for documentation in the final Transition Plan.

**Note for RFT Schedules: Schedules for these Buildings should include a note for the Respondent to refer to this statement of requirements section when preparing and completing their submission. In particular the generic product specification and Appendix [insert number] that provides more detail on product requirements should be highlighted.

Green Cleaning Transition Plan (the 'template'):

The following key aspects should be covered in your plan for submission with your response to this RFT.

- Products and consumables;
 - o Environmentally preferred items
 - o Recycled content in packaging and packaging is recycled
 - o Recycled content in paper products (toilet paper, towels, etc), including pre or post consumer in origin
 - o Bulk and concentrate form for dilution
 - o Dispensing systems
- Equipment, including specifications for energy consumption, filtration systems, etc.
- Technology (microfiber cloths and mops, buckets, equipment to reach high places, difficult to reach places, colour coding systems, etc)
- Methods – also covered in SOP's
- Preparatory tasks (eg stripping polish and sealing resilient floor surfaces for modified maintenance regime)
- Infrastructure: modifications or installations to Cleaners Stores for storage, dispensing, preparation of tools and applicators, etc.
- Communications: team structure, documentation of SOP and training
- Timeframe for completion of individual actions, including staged roll out post pilot phase.

References:

USA Environmental Protection Agency:

Environmentally preferred purchasing program database: www.epa.gov/epp/pubs/cleaning.htm#product

Leonardo Academy Inc (USA):

'Sustainable Building Rating Systems and Janitorial Products', June 2006.

Australian Environmental Labelling Association: GECA 17-2006 for General Purpose Cleaners; and GECA 37-2008 for Cleaning Services;

Sustainable Choice (program of the NSW LGSA) Briefing Paper 'Cleaning Products and Services' 2007.

City of Seattle, Request for Proposal # JCT-022502 'Environmentally Preferable Janitorial Cleaning Products' 2002.



Green Cleaning Product Special Criteria

PRODUCT CATEGORY	APPLICATIONS	MINIMUM SPECIFICATION	NOTES TO SPECIFICATION
General Purpose Cleaner / Degreaser	For floors, marble, granite, quarry tile, vinyl, composition tile. Suitable for porcelain, linoleum, painted & unpainted walls, countertops, and metal surfaces.	Non-aerosol; may be concentrated or ready to use. Must have the ability to dissolve a wide range of fats, grease, inks, dirt, or petroleum hydrocarbons. Must be non-abrasive and rinse free.	
Glass and Perspex cleaner	Windows, mirrors, Perspex, situations where non-streak finish is required.	Must be non flammable, mild ammonia or alcohol based products preferred.	If general purpose cleaner not suitable.
Carpet Spot Cleaner	Spot removal of stains in carpets Non aerosol, fully biodegradable,	Compliant with generic product specification.	In most instances a mild detergent is suitable for this task.
Carpet Shampoo	For periodic maintenance of carpets	No optical brighteners.	No sodium lauryl sulphate as foaming agent. Compliant with generic product specification.
Upholstery Spot cleaner	As for carpet spot cleaner	Compliant with generic product specification	In most instances a mild detergent is suitable for this task.
Upholstery shampoo	As above	Compliant with generic product specification	In most instances a mild detergent is suitable for this task.
Floor Cleaner – if different to General Purpose Cleaner		pH neutral, fully biodegradable, no artificial fragrances. Compliant with generic product specification.	Exemptions where manufacturer's instructions specify different products during warranty period.
Floor Sealer	Non slip sealant to protect resilient floor finishes.	Least hazardous product in terms of flammability, hazard, dangerous goods rating and reactivity. No or only trace levels of metals, < 5% by concentrate volume glycol-ether and formaldehyde free	Containers not to be disposed of through general waste, follow instructions on packaging.
Basin, Tub and Tile Cleaner	Bathroom tiles, hand basins, sinks.	No phosphates, glycol ethers, dyes, chlorine and non caustic, compliant with generic product specification.	May require some abrasive action for stain removal.
Disinfectant / Germicide	For use in any public area only where specified. For use on walls, floors, restroom, water fountains, countertops, telephones, and garbage cans.	Compliance with generic product specification.	The University believes that combination cleaner -disinfectants are ineffective and result in over use of highly toxic disinfectants. Therefore no products will be combination cleaner - disinfectants.



PRODUCT CATEGORY	APPLICATIONS	MINIMUM SPECIFICATION	NOTES TO SPECIFICATION
Toilet Bowl Cleaner	Must not be a combination cleaner / disinfectant.	Products containing the following ingredients are not acceptable: Bleach(Sodium Hypochlorite); Nitrilotriacetate; Paradichlorobenzene; Phenol Hydrochloric Acid; Nitrilotriacetic acid; Perchloroethylene; Tetrachloroethylene	High traffic toilets may require daily use of a stronger cleaner; these areas are identified in Schedule 1 by frequency of service. In every other location, a non acid cleaner is used daily, with stronger chemicals used once weekly or less frequently to provide a regular deep clean.
Deodoriser	Eliminates odours produced by cigar and cigarette smoke, urine and faecal matter, mildew, vomit, food spillage, garbage, cooked foods, pets and perspiration.	No aerosol dispensers.	Non-staining, for use in a pump spray container when applied manually.
Soap	Liquid hand soap for use in dispensers	Must not contain any of the following fragrances Common Name & CAS # Moskusxylene 81-15-2 Moskusambrette 83-66-9 Moskene 116-66-5 Moskustibetin 145-39-1 Moskusketone 81-14-1	
Microfibre cloths and mops	For use in specified cleaning task, in particular to substitute for application of chemicals.	Minimum 1 denier Colour coded	Minimum denier density to ensure optimum removal of particulates. Colour coded for compliance with cross contamination avoidance procedure.

Equipment

Tenderers should provide specifications for all proposed equipment including but not limited to:

- Weight and power in hp
- Noise level in dba
- Dust-bag capacity where applicable
- Mode of mounting, use, application (back mounted, self driving, etc)
- Cord length
- Dispensing system where applicable
- Brush speed, where applicable
- Water rating where applicable
- Energy Star rating where available
- Propane powered or other combustible fuel burning floor equipment must not be used
- Maintenance plan, including testing and tagging.
- For vacuums in particular, the filtration system and % extraction at micron size should be provided.

Tender Evaluation

Workbook

Job Name: _____

Tender number: _____

Panel member: _____

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Conflict of Interest

Conflict of Interest declaration

Each member of the selection panel is required to make the following declaration. If you cannot in good faith make this declaration it may require your exclusion from the tender process, so you are required to notify the Tender Evaluation Panel Facilitator immediately.

Given Names: _____ Surname: _____ Position: _____ Unit/Division: _____ Matter under consideration: Tender evaluation	Expected role/duties to be performed by the employee in dealing with this matter: Review and evaluate tenders and make a recommendation on the preferred Vendor. No private interests which have the potential to impact on the employee’s ability to carry out, or be seen to carry out, their official duties impartially and in the interest of Facilities Management have been identified.
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Declaration

I do solemnly and sincerely declare that, to the best of my knowledge and belief, there are no actual, perceived or potential conflicts of interest with respect to the evaluation of this tender, and I make this solemn declaration conscientiously believing the same to be true under and in accordance with the provision of the Commonwealth Statutory Declarations Act 1959.

Signature (Officer) _____ Date / / 2006

Disclosure Privacy Statement

The information you provide in this document is collected in accordance with the requirements of the Conflict of Interest Policy. Failure to disclose could result in adverse effects such as damage to reputation, misconduct or disciplinary proceedings or legal action.

Sensitive and Confidential Information

The University recognizes that the information provided by you in this disclosure is personal and sensitive. The University considers the information to have been given in confidence, and undertakes to treat it confidentially. The University will maintain confidentiality where it is necessary for the protection of essential public interests and the private and business affairs of persons and organizations in respect of whom information is collected. Controls are in place to prevent the indiscriminate release of information.

Disclosure within the University

In addition to the Head of School or administrative unit, the information you provide may also be disclosed to other relevant officers of the university, including members of the Disclosure Review Committee, an external or internal independent expert, the Deputy Vice-Chancellor (Academic) and Chair of the Audit Committee of Council. All such disclosures will, as far as is practicable and reasonable, be in a de-identified form.

Access and Retention

This document and any copies will be retained in the Office of the Deputy Vice-Chancellor (Resources), Facilities Management Department before being destroyed in accordance with the requirements of the State Records Act 1998 (NSW). Under the Privacy and Personal Information Protection Act 1998 (NSW) you have a right to find out what information the University holds about you and to inspect it.

1

Assessment of Vendor submissions

Evaluating tenders

The evaluation method employed for this tender is intended to identify the Vendor who meets the requirements of the Request For Tender (RFT) and in doing so offers the best value for money.

The selection criteria from section 1.6 of the RFT are:

- (a) conformity with tender documents;
- (b) capital cost compared with estimated cost;
- (c) construction period;
- (d) proposed alternatives;
- (e) contractor's construction personnel;
- (f) construction program;
- (g) proposed methods;
- (h) value for money;
- (i) tenderer's resources;
- (j) tenderer's current commitments;
- (k) tenderer's previous performance;
- (l) industrial relations and safety record.

Due to the specialised nature of some of the requirements of the RFT, it will be necessary to supplement the Evaluation Panel's capabilities to address those areas using specialist input.

Specialist advisers will review the tenders and submit a written report to the panel analysing and identifying how the responses meet the requirements. Specialist advice is intended to assist Evaluation Panel deliberations and are coordinated by the Evaluation Panel Facilitator.

Contractual matters will not be assessed by the Evaluation Panel but will be referred to the Legal Office.

Selection criteria and scoring

The first task the Evaluation Panel must carry out, prior to the consideration of tenders is to clarify evaluation criteria and then to assign the criteria a weighting to reflect its respective importance in the overall evaluation. The total of all weightings must equal 100%.

Evaluation criteria	Weighting %
(a) ability to demonstrate value for money;	
(b) the capacity of the vendor to achieve agreed budget targets;	
(c) ability of the proposed project team to deliver within the project timeframe;	
(d) quality of response to the RFT;	
(e) quality of the team offered;	
(f) ability to manage the risks of the project;	
(g) OH&S, ISO9000, ISO14000 management systems in place;	
(h) level of demonstrable understanding of the project brief and its challenges;	
(i) level of demonstrable specialist expertise offered;	
(j) knowledge of and ability to deliver the project to relevant UNSW standards;	
(k) tenderer's previous performance;	
(l) industrial relations and safety record.	

Vendor Evaluation Sheets

Vendor evaluation scoresheets are used to capture each Panel Members scoring for all of the evaluation criteria throughout each stage of the evaluation process.

Each Panel Member will “score” each Vendor against the evaluation criteria in these performance areas using the scoring indicator below as a guide.

Please note

Evaluation Panel Members are required to sign-off their evaluation notes made on each Vendor Evaluation scoresheet.

Scoring scale:

Exceeds requirements	100%
Meets requirements	75%
Meets requirements with minor exceptions	50%
Does not meet requirements but can be adapted	25%
Major non-compliance with requirements	0%

Vendor:

<i>Evaluation Segment/Performance Area</i>	<i>Performance Ranking</i>			<i>Comments</i>
	<i>RFT Response</i>	<i>Vendor Presentation</i>	<i>Overall Rating</i>	
(a) Capacity of vendor to achieve budget targets				
(b) Ability of project team to deliver in time-frame				
(c) Quality of response to RFT				
(d) Quality of team offered				
(e) Ability to manage project risks				
(f) OH&S, ISO9000, ISO14000 systems in place				
(g) level of demonstrable understanding of brief				
(h) level of demonstrable specialist expertise				
(i) knowledge of & ability to deliver to UNSW standards				
(j) tenderer's previous performance				
(k) industrial relations and safety record				
TOTAL				

Evaluation Panel Member Signature: _____ Date: _____ / _____ / 2006

Vendor:

<i>Evaluation Segment/Performance Area</i>	<i>Performance Ranking</i>			<i>Comments</i>
	<i>RFT Response</i>	<i>Vendor Presentation</i>	<i>Overall Rating</i>	
(a) Capacity of vendor to achieve budget targets				
(b) Ability of project team to deliver in time-frame				
(c) Quality of response to RFT				
(d) Quality of team offered				
(e) Ability to manage project risks				
(f) OH&S, ISO9000, ISO14000 systems in place				
(g) level of demonstrable understanding of brief				
(h) level of demonstrable specialist expertise				
(i) knowledge of & ability to deliver to UNSW standards				
(j) tenderer's previous performance				
(k) industrial relations and safety record				
TOTAL				

Evaluation Panel Member Signature: _____ Date: _____ / _____ / 2006

Vendor:

Evaluation Segment/Performance Area	Performance Ranking			Comments
	RFT Response	Vendor Presentation	Overall Rating	
(a) Capacity of vendor to achieve budget targets				
(b) Ability of project team to deliver in time-frame				
(c) Quality of response to RFT				
(d) Quality of team offered				
(e) Ability to manage project risks				
(f) OH&S, ISO9000, ISO14000 systems in place				
(g) level of demonstratable understanding of brief				
(h) level of demonstratable specialist expertise				
(i) knowledge of & ability to deliver to UNSW standards				
(j) tenderer's previous performance				
(k) industrial relations and safety record				
TOTAL				

Evaluation Panel Member Signature: _____ Date: _____ / _____ / 2006

Vendor:

<i>Evaluation Segment/Performance Area</i>	<i>Performance Ranking</i>				<i>Comments</i>
	<i>RFT Response</i>	<i>Vendor Presentation</i>	<i>Overall Rating</i>		
(a) Capacity of vendor to achieve budget targets					
(b) Ability of project team to deliver in time-frame					
(c) Quality of response to RFT					
(d) Quality of team offered					
(e) Ability to manage project risks					
(f) OH&S, ISO9000, ISO14000 systems in place					
(g) level of demonstrable understanding of brief					
(h) level of demonstrable specialist expertise					
(i) knowledge of & ability to deliver to UNSW standards					
(j) tenderer's previous performance					
(k) industrial relations and safety record					
TOTAL					

Evaluation Panel Member Signature: _____ Date: _____ / _____ / 2006

2

Vendor presentations

Stage Two involves Vendor presentations to allow each Tenderer to show the Evaluation Panel Members that their proposal provides the best value for money for the University. Proposals from one Tenderer must not be discussed with other Tenderers.

Care should be taken to ensure that all working papers associated with the evaluation process are not in plain view during presentations and are secured during and after the evaluation is complete.

Asking Questions

It is anticipated that initial reviews of Vendor submissions will raise issues that require clarification. You do not have to ask all the Vendors the same questions.

However this requirement to request further information should be balanced with the need to ensure that all Vendors are provided with equal opportunity to provide all relevant information.

In order to facilitate fairness and transparency of process but also make the most of the presentations, Evaluation Panel Members are encouraged to ask questions of each Vendor.

Questions asked will be documented by the Facilitator of the Evaluation Panel.

3

Comparative review

After the Vendor presentations have been concluded, the Evaluation Panel will meet to discuss all submission material and to reach an agreement on the preferred Vendor.

To ensure probity, and as unsuccessful suppliers are likely to be disappointed and may attempt to bring their submission back into contention, it is essential that the reasons for rejecting a submission be consistently applied, and that the reasons for the rejection of non-preferred Vendors will be fully documented by the Evaluation Panel Facilitator.

Checking Vendor references

Vendor references will be checked in parallel with Evaluation Panel deliberations.

Requests to check particular aspects of a Vendor's performance may be made to the Facilitator who will provide response information to Panel Members in the final stages of the evaluation process. Reference check feedback will also form part of the final report.

Tender Evaluation Panel Summary Report

The final report of the Evaluation Panel is called the Tender Evaluation Panel Summary Report. It will be compiled by the Facilitator of the Evaluation Panel and signed off by each Panel Member.

The Tender Evaluation Panel Summary Report is then forwarded to the Project Control Group for authorisation and also forms part of the sign-off paper work that is forwarded to the Deputy Vice Chancellor (Resources).

Preferred Vendor Recommendation

The deliverable from this process is a recommendation to the Project Control Group which will take one of the following forms;

1. Identification of a Preferred Vendor.
2. Requirement to re-visit one or more Vendors and the reasons why.
3. Identification that none of the Vendors are suitable and the reasons why.

Activities occurring in parallel with Evaluation Panel deliberations

- Vendor reference checks
- Specialist Advice
 - quantity surveyor
 - architectural
 - other as requested by the evaluation panel