



Template Redevelopment Project (TRP) – Overview Guideline

Guideline describing the TRP Pilot, core templates
and new terminology

July 2024



Contents

1. INTRODUCTION	2
1.1 Template Redevelopment Project (TRP)	2
1.2 Overview Guideline	2
1.3 TRP Pilot Phase 1 Scope	3
1.4 Feedback and Questions	3
2. OVERVIEW OF DOCUMENTS	3
2.1 TRP Templates	3
2.1.1 <i>RFO / Request for Offers</i>	3
2.1.2 <i>Response Form</i>	4
2.1.3 <i>Request Conditions</i>	4
2.1.4 <i>Standing Offer Conditions</i>	4
2.1.5 <i>Contract Conditions</i>	4
2.2 Key Documents	5
3. DOCUMENT FRAMEWORK	6
3.1 Request for Offers (RFO)	6
3.1.1 <i>Overview of RFO Parts</i>	6
3.1.2 <i>Completing and Submitting Documents</i>	7
3.2 Response Form	7
3.2.1 <i>Attachments to the Response Form</i>	8
3.2.2 <i>Overview of Response Form Sections</i>	8
4. TERMINOLOGY	10

Document Control & Licence to Reuse

This guideline document has been developed by the Department of Finance in connection with the Template Redevelopment Project (TRP) Pilot – Phase 1.

Refer to the Template Redevelopment Project page on WA.gov.au for more information about the TRP Pilot and related templates.

If you have any queries in relation to this guideline, contact TRPAdvice@finance.wa.gov.au.

Document Control Record

The current version of this guideline is available from WA.gov.au. The document history is set out below.

PUBLICATION DATE	VERSION	REVISION NOTES
July 2024	1	Release

Licence to Reuse

This template is licensed under a [Creative Commons Attribution 4.0 International Licence](https://creativecommons.org/licenses/by/4.0/).



Attribution

© Government of Western Australia (Department of Finance) 2024

You are free to reuse the work under the CC BY licence, on the condition that you attribute the Government of Western Australia (Department of Finance) as author, indicate if changes were made, and comply with the other licence terms. The licence does not apply to any branding or images.

Western Australian Coat of Arms

The CC BY licence does not apply to the Government of Western Australia Coat of Arms. Non-governmental organisations may not use the Coat of Arms in any format without authorisation. Permission to reuse the Coat of Arms may be sought from the Department of the Premier and Cabinet. Refer to the Common Badging page on WA.gov.au for more information.

1. INTRODUCTION

1.1 Template Redevelopment Project (TRP)

Following the commencement of the *Procurement Act 2020 (WA)* and the WA Procurement Rules, the Department of Finance has worked with the State Solicitor's Office to develop a new suite of whole of government procurement template documents. This project is called the Template Redevelopment Project (TRP).

The new documents have been developed to support the following objectives:

- Alignment of procurement documents to the WA Procurement Framework.
- Implementation of a core suite of templates that may be adapted for all procurement types (goods and services, including community services, and works), providing improved clarity and consistency across procurement documents.
- Greater clarity and functionality for all users through modern drafting, consistent terminology and cross-references, and improved document formatting and structure.
- A more logical and user-friendly document framework and content layout offering improved accessibility for suppliers, contract developers and contract managers.

To ensure fitness for purpose, the TRP templates will be piloted on select Finance-facilitated goods and services procurements before implementation across the sector.

1.2 Overview Guideline

This guidance document provides an overview of the TRP, the Phase 1 Pilot and core templates.

The guidance covers:

- the scope and duration of the pilot
- the new suite of templates and conditions documents, and
- the main changes in terminology between the existing goods and services procurement templates published by the Department of Finance and the TRP templates.

1.3 TRP Pilot Phase 1 Scope

During Phase 1 of the Pilot the TRP templates (listed below at section 2.1) will be piloted on procurements that meet the following criteria:

TRP PILOT PHASE 1 – PROCUREMENT CRITERIA	
Type :	Finance-facilitated goods and services procurement processes, including single-agency Standing Offers (excluding Common Use Arrangements). Cooperative Procurement Arrangements will be assessed for inclusion in the Pilot on a case by case basis for pilot suitability.
Value :	From \$250,000 up to less than \$5 million.
Term :	Contracts up to five years (including extensions).

The following procurements are excluded from Phase 1 of the TRIP Pilot:

PROCUREMENTS EXCLUDED FROM THE TRP PILOT PHASE 1
<ul style="list-style-type: none">• Common Use Arrangements• Cleaning services, ICT and building maintenance procurements.• Community services and works procurements.• Single agency procurement processes where Finance is not involved.• Procurements below \$250,000 or above \$5 million, even if Finance is involved.

1.4 Feedback and Questions

If you have feedback on using the new templates, or the content and structure of the templates or the supporting material, you can provide feedback by completing the by contacting TRPAdvice@finance.wa.gov.au.

2. OVERVIEW OF DOCUMENTS

This section provides an overview of the core TRP templates and explains how the new templates compare to the existing templates.

2.1 TRP Templates

There are five core TRP templates. See below for a description of each document.

2.1.1 RFO / Request for Offers

- This document is similar to Part A and Schedule 1 of the existing non-TRP Request templates for goods and services procurements.

- It is the main approach to market document and includes information about the Request process, Offer submission requirements, policy, evaluation and pricing requirements, contract details and specifications.

2.1.2 Response Form

- This document is similar to Part B and the schedules (other than Schedule 1) of the existing non-TRP Request templates for goods and services procurements.
- The Response Form is the main document to be completed and returned by Respondents to document their Offer.
- When completed, it will contain important details such as legal entity information, compliance and disclosure information, responses to the qualitative requirements, and the offered price.

2.1.3 Request Conditions

- The content in the TRP Request Conditions is similar to the content in Part A of the existing Request Conditions and General Conditions of Contract (**RC&GCOC**) for goods and services procurements.
- The terms and conditions contained in the TRP Request Conditions govern the Request process, including the submission and evaluation of Offers.

2.1.4 Standing Offer Conditions

- The TRP Standing Offer Conditions contain similar rights and obligations to those in the Head Agreement provisions in the General Conditions of Contract in Part B of the current RC&GCOC.
- The Standing Offer Conditions are only applicable to Standing Offers established using the TRP templates. As such, they will not apply to every procurement.

2.1.5 Contract Conditions

- The TRP document framework anticipates different Contract Conditions for different types of procurements. The applicable Contract Conditions for goods and services contracts formed as part of the Pilot are the TRP General Conditions of Contract.
- The content in the TRP General Conditions of Contract is similar to the Customer Contract provisions in the General Conditions of Contract in Part B of the current RC&GCOC.
- The Contract Conditions apply to any Contract formed as a result of a Request documented by TRP templates or formed a Standing Offer established using TRP templates.

2.2 Key Documents

The table below compares key terminology used in the existing non-TRP goods and services templates (for procurements valued at \$250,000 and above) and the TRP templates.

Table 1: Non-TRP and TRP Templates and Conditions

Current Templates & Conditions	TRP Templates & Conditions
Request	RFO / Request for Offers
	Response Form
Part A – Request Conditions <i>Request Conditions and General Conditions of Contract (RC&GCOC)</i>	Request Conditions
Part B – General Conditions of Contract <i>RC&GCOC</i>	Standing Offer Conditions
Part A – Request Conditions <i>RC&GCOC</i>	Contract Conditions (General Conditions of Contract)

3. DOCUMENT FRAMEWORK

The TRP templates comprise a document framework that will provide clarity and consistency for all users. This section provides an overview of the RFO and Response Form documents, and how they are issued and completed.

3.1 Request for Offers (RFO)

The RFO document is the main approach to market document. Its objective is to:

- explain what the procurement is for (the State agency’s requirements);
- describe the process that will be followed while undertaking the procurement (the submission and evaluation process); and
- outline how the contract will operate once it is formed.

3.1.1 Overview of RFO Parts

The table below lists the RFO Parts and provides a brief description of what they contain.

RFO Part	Description
Part A: Overview	Background information and an overview of the procurement.
Part B: Documents and Information	Lists the documents describing the request and the documents that the Respondent must complete and submit. Provides information about tender briefings and contact persons.
Part C: Offer Requirements	Part C covers a variety of different requirements that apply to Offers, including the Offer Validity Period, mandatory prequalification requirements, and how to submit an Offer.
Part D: Government Policy Framework	Provides information on the application of certain government policies, strategies and regulatory schemes.
Part E: Assessment of Offers	Describes how Offers will be assessed (the evaluation of Offers process).
Part F: Specification	Outlines the Specification, including the Statement of Requirements.
Part G: Pricing Requirements	Specifies the pricing requirements.
Part H: Standing Offer Details	If the Request will establish a Standing Offer, then Part H will describe specific requirements that apply to this arrangement.
Part I: Contract Details	Describes specific requirements that apply to any Contract resulting from the Request.

Part J: Glossary	Lists key defined terms used in the RFO and the Response Form, and where they are defined.
Schedules 1-3	<p>Schedules 1-3 are optional and may apply depending on the requirements of the procurement. They respectively address:</p> <ul style="list-style-type: none"> • Standing Offer Orders • Pro Bono Legal Services • Unconditional Performance Guarantee <p>The Requesting Agency may include additional schedules as required.</p>
Annexure 1: Standing Offer Buying Rules	This Annexure will apply if the Request is for a Standing Offer procurement and will provide information about the Standing Offer Buying Rules.

3.1.2 Completing and Submitting Documents

Part B and Part C of the RFO are particularly important as they contain information about how to complete and submit an Offer in response to a Request.

(a) Part B (Documents and Information)

Part B describes:

- The documents that apply to the Request process and describe the Requesting Agency’s requirements for the procurement.
- The documents issued for completion and submission by the Respondent.
- The terms and conditions applicable to the Request (and if applicable, a Standing Offer) and any Contract resulting from the Request.
- How to access the documents.

(b) Part C (Offer Requirements)

Part C provides important information about the Offer requirements, including the:

- Closing Time.
- Offer Validity Period.
- Format that Respondents must use to submit their Offer.
- Other documents that Respondents must submit (other than the Response Form and its attachments).

3.2 Response Form

The Response Form is the principal document that Respondents will use when completing and submitting an Offer. The Response Form is comprised of core sections (e.g. Respondent’s details, compliance and disclosure, insurances, qualitative requirements,

specified personnel, referees and pricing), as well as optional sections to be selected if they are applicable (e.g. mandatory pre-qualification requirements and alternative proposals). Refer to section 3.2.2 for more information.

3.2.1 Attachments to the Response Form

The Requesting Agency has discretion to allow Respondents the option of submitting information in an attachment for all or selected questions in the Response Form.

Each section of the Response Form will specify whether the Requesting Agency:

- requires the Respondent to submit evidence in support of a statement made in the completed Response Form as an attachment; or
- gives the Respondent the option to provide additional information as an attachment.

3.2.2 Overview of Response Form Sections

The table below lists the Response Form Sections and provides a brief description of what they will contain if completed.

RFO Part	Description
Section A: Respondent's Details	Information about the Respondent, such as legal entity name and business details.
Section B: Mandatory Prequalification Requirements	Addresses mandatory prequalification requirements if these are specified in the RFO.
Section C: Compliance and Disclosure	Responses to compliance and disclosure requirements, including details of any departures from the Standing Offer Conditions (if applicable) and/or the Contract Conditions.
Section D: Insurance Requirements	Information about the Respondent's insurances.
Section E: Qualitative Requirements	The Respondent's responses to the qualitative requirements.
Section F: Specified Personnel	Details of Specified Personnel, if the RFO requires the Respondent to provide this information.
Section G: Referee Details	Details of the Respondent's referees.
Section H: Pricing	If applicable, Respondents will provide pricing information in this Section.
Section I: Alternative Proposal	Information relating to an alternative proposal, if this is permitted under the RFO.

<p>Section J: Attachments</p>	<p>A checklist for the Respondent to identify all sections of the Response Form to which it has submitted an attachment.</p> <p>The Requesting Agency may include this optional Section if the RFO is complex and Respondents need to submit a number of attachments together with the Response Form.</p>
<p>Appendix 1: Maintenance Agreement Form</p>	<p>The Requesting Agency may include this optional Appendix if the RFO requires Respondents to complete a Maintenance Agreement Form.</p>
<p>Appendix 2 and Exhibit A.</p>	<p>The Requesting Agency may choose to include additional Appendices and/or Exhibits for the Respondent to complete.</p>

4. TERMINOLOGY

The TRP templates seek to improve clarity for all users through precise and consistent terminology. If you are using the TRP templates, it is essential that you familiarise yourself with the key defined terms.

The TRP definitions listed below are sourced from the TRP Request Conditions, Standing Offer Conditions and TRP General Condition of Contract as applicable. In some cases the definition appears in all three conditions documents. The primary source of each definition is listed in the 'Source' column below – Request Conditions (RCs), Standing Offer Conditions (SOCs) and General Conditions of Contract (GCs).

Part J of the RFO also provides a Glossary that lists defined terms used in the RFO and the Response Form, as well as the source of the definitions.

Table 2: Key Terminology – Parties

TRP Defined Term	Source	Meaning	Equivalent RC&GCOC Term
Requesting Agency	RCs	State agency that issues the Request Documents. State agency that manages the Standing Offer (if applicable).	Contract Authority
Respondent	RCs	Person / entity that submits an Offer.	Respondent
Eligible Customer	SOCs	Agency or Authorised Body that may form a Contract under a Standing Offer.	Potential Customer
Customer	GCs / SOCs	Agency that has issued a Letter to the successful Responded to form a Contract under the Request. Agency or Authorised Body that has issued a Standing Offer Order to a Supplier to form a Contract under the Standing Offer.	Customer
Supplier	SOCs	Respondent whose Offer is accepted and receives a Letter of Appointment to the Standing Offer.	Contractor
Contractor	GCs	Respondent whose Offer is accepted and receives a Letter establishing a Contract. Supplier who receives a Standing Offer Order establishing a Contract.	Contractor

Table 3: Key Terminology – Concepts and Documents

TRP Defined Term	Source	Meaning	Equivalent RC&GCOC Term
Request	RCs	<p>Conceptual term covering the act of issuing a request for supply, the terms and details of which are documented by the Request Documents.</p> <p>The defined term “Request” in the TRP documents is subtly different to the equivalent term in the GCoC. The GCoC definition is used to refer to the Request document, whereas the TRP documents have separate definitions for the documents (the Request Documents and the RFO and Response Form).</p>	Request
Request Conditions	RCs	The conditions applicable to the Request process, and the submission and evaluation of Offers.	<i>Part A of the Request Conditions and General Conditions of Contract</i>
Request Documents	RCs	The RFO and the Response Form, including any document incorporated therein and any Addendum.	<i>No direct equivalent</i>
RFO / Request for Offers	RCs	<p>The approach to market document describing the request for offers process, Standing Offer Details, Contract Details, specification and other requirements.</p> <p>The definition of RFO in the TRP Request Conditions covers the actual RFO document, together with any additional documents incorporated by reference in the RFO and any Addenda.</p>	<p>Request</p> <p><i>(Content is similar to Part A and Schedule 1 of the current templates)</i></p>
Response Form	RCs	<p>The main document for completion by the Respondent to document their Offer.</p> <p>The definition of Response Form in the TRP Request Conditions covers the actual Response Form document, together with any additional documents incorporated by reference in the Response Form and any Addenda.</p>	<p><i>No direct equivalent.</i></p> <p><i>(Content is similar to Part B and Schedules other than Schedule 1 in the current templates)</i></p>

TRP Defined Term	Source	Meaning	Equivalent RC&GCOC Term
Addendum	RCs	<p>The definition of Addendum in the TRP documents is broader than the RC&GCOC equivalent term.</p> <p>Under the TRP Request Conditions the Requesting Agency may issue an addendum to any Request Document (that includes the RFO document, the Response Form Document and any document incorporated by reference into those defined terms).</p>	Addendum
Offer	RCs	An Offer or (if relevant) an alternative proposal submitted by the Respondent/Contractor/Supplier in response to the Request.	Offer
Letter	GCs	The document issued by the Customer that accepts the Respondent's Offer (if the Contract is formed directly as a result of the Request). The Letter may specify amendments to the Contract Documents or any other applicable terms and conditions which the Customer and Contractor have agreed.	Letter
Contract	GCs	Directly equivalent to 'Customer Contract' under the General Conditions of Contract.	Customer Contract
Letter of Appointment	SOCs	The document issued by the Requesting Agency that accepts the Respondent's Offer (if the Request establishes a Standing Offer). The Letter of Appointment may specify amendments to the Standing Offer Documents and/or the Contract Conditions, or any other applicable terms and conditions.	Letter
Contract Documents	GCs	The General Conditions, the Request (excluding the Contract Details), the Offer, the Contract Details, the Standing Offer price list and Letter of Appointment (if applicable) and the Letter or, if buying of a Standing Offer, the Standing Offer Order.	Contract Documents
Contract Conditions	RCs / SOCs	The terms and conditions specified in the RFO as the conditions applicable to any Contract resulting from the Request. Part	<i>No direct equivalent</i>

TRP Defined Term	Source	Meaning	Equivalent RC&GCOC Term
		B.1.4.4 of the RFO specifies the TRP General Conditions of Contract as the applicable Contract Conditions for goods and services Contracts.	
General Conditions	GCs	The TRP General Conditions of Contract.	General Conditions <i>(Customer Contract provisions in Part B of the RC&GCOC)</i>
Standing Offer	SOCs	The agreement between the Requesting Agency and the Supplier, the terms and conditions of which are contained in the Standing Offer Documents.	Head Agreement
Standing Offer Documents	SOCs	The Standing Offer Conditions, Request Documents (excluding the Standing Offer Conditions, the Offer, the Standing Offer Details and the Letter of Appointment.	Head Agreement Documents
Standing Offer Conditions	SOCs	The Standing Offer Conditions describe the terms and conditions applicable to the supply of Standing Offer Deliverables.	General Conditions <i>(Head Agreement provisions in Part B of the RC&GCoC)</i>
Standing Offer Deliverables	SOCs	The goods, services and/or works described in the Standing Offer. This concept covers the Supplier's deliverables at the Standing Offer level and the supply that is available to Eligible Customers that seek to establish a Contract under the Standing Offer.	<i>No direct equivalent.</i>
Standing Offer Request for Supply	SOCs	This mechanism is available to an Eligible Customer if they need to request information from a Supplier before issuing a Standing Offer Order. The Standing Offer Request for Information and Supplier's Reply is similar to a quote process. The Eligible Customer specifies its requirements in the Standing Offer Request for Supply and the Supplier issues a Reply responding to those requirements. The Eligible Customer may, but is not required to, issue a Standing Offer Order relying on the information in the Reply.	<i>No direct equivalent.</i>

TRP Defined Term	Source	Meaning	Equivalent RC&GCOC Term
Reply	SOCs	A Supplier's response to a Standing Offer Request for Supply.	<i>No direct equivalent.</i>
Standing Offer Order	SOCs	Essentially the same as 'Order' under Part B of the RC&GCOC. May be preceded by a Standing Offer Request for Supply and Supplier's Reply process as described above.	Order

~ END OF DOCUMENT ~