# RFx procurement template

## Note to Australian Digital Health Agency and external organisations

This document is a generic template designed to support your procurement process by offering a template and instructions for use. Staff and external agencies intending to use this template will need to select and customise the sections in this template to meet their specific procurement requirements and should seek appropriate professional guidance as required.

## Disclaimer

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## Instructions for the Buyer

RFx is a generic acronym used to cover an assortment of tender types, such as Request for Quote (RFQ) and Request for Proposal (RFP). This template serves as a guide and can be tailored to meet the specific needs of your procurement, whether it is an RFP, RFQ or other. The sections may vary depending on the procurement method being used. You may wish to add or remove sections to ensure it aligns with your procurement requirements. We recommend seeking appropriate advice from your internal procurement or legal team before using or modifying the template.

Everything in **red** is information for the buyer (that’s you). Delete these red parts throughout the document, prior to publishing the RFx. Anything shaded in **YELLOW** is customisable. When you have completed these areas please un-shade them.

| **Before you release your RFx…** |  |
| --- | --- |
| 1. **Review and customise the sections in this document highlighted YELLOW.**
 | [ ]  |
| 1. **Delete all instructions and tips (RED).**
 | [ ]  |
| 1. **Remove the customised areas highlighted YELLOW.**
 | [ ]  |
| 1. **Delete pages 1 and 2**
 | [ ]  |

[insert Buyer (agency) logo]

# [RFx Title]

by: [insert name of the Buyer]

for: [insert name of procurement]

ref: [insert procurement reference number]

[RFx] released: [DD MM YY]

Deadline for Questions: [DD MM YY]

Deadline for Responses: [TIME DD MM YY]

[Name of Buyer]

[Website]

[Street address]

[City]

### Introduction

Provide a short high level statement to give an overview of your organisation and how this RFx aligns with its business or policy objectives.

[Example: Our organisation plays an important role in shaping and delivering healthcare to the xx community. We develop and deliver policy, services, advice and regulation to support clinical care to support the health and wellbeing of xx community.]

## Procurement method

This section should name and briefly describe your procurement method. You can find definitions at the end of Section 3.

Procurement methods:

* Open tendering
* Selective tenders
* Request for information (RFI)
* Request for proposal (RFP)
* Request for quotations (RFQ)
* Single Source Procurement
* Two-staged tendering
* Request for tender (RFT)

Make sure to you tailor the [RFx] references throughout this document highlighted in YELLOW to align with your chosen procurement method.

This [RFx] is issued by [insert full legal name of Buyer], referred to below as “the Buyer” or “we” or “us”. An [Rfx] is a [Insert definition of procurement method as needed].

### What we need

Briefly summarise the information you need in one or two paragraphs. Make sure the content is written in plain English, is concise. Avoid jargon and acronyms. Include any relevant background. Give context where possible.

[**Example**: Interoperability is key to improving the consistency and quality of care for Australian residents. The organisation is seeking an interoperable Laboratory Information System (LIS) to integrate with its core clinical systems.]

### Why should you respond?

Motivate respondents. Let them know what is in it for them. What difference can they make? Why is this work important?

[**Example**: This is a unique opportunity to assist us to understand the market and help us to ensure we deliver high quality care to residents of Australia.]

## Key information

### Context

1. This [RFx] seeks [proposals | quotations | information] that will help [organisation name] [purpose of procurement].
2. Reference number: [insert procurement reference number]

### Our timeline

Times are in [time zone]:

| **Deadline for Questions from Respondents:** | [time] [DD MM YY] |
| --- | --- |
| **Deadline for the Buyer to answer questions:** | [time] [DD MM YY] |
| **Deadline for Responses:** | [time] [DD MM YY] |

### Point of Contact

**Name:** [insert the name of the contact person]

**Title/role:** [insert their title or role and the unit they work in]

**Email address:** [insert email address]. [Delete if not applicable]

### Developing and submitting your information

1. Take time to read and understand the [RFx]. Pay close attention to our Requirements. These are detailed in [Section 2](#_Our_Requirements) of this document.
2. If you have questions, reach out to our Point of Contact before the Deadline for Questions (see 1.3 above).
3. Submit your Response before the Deadline for Responses [via response form or alternative method].

Buyers: make sure that you attach or include a hyperlink to the relevant Response Form or provide alternate instructions for submitting a response in this section.

### Address for submitting your Response

Submit your Response to the following address: [insert agency email address or other method for submission].

**We will not accept Response sent by post or delivered to our office.** [Delete if not applicable]

## Our Requirements

**Read these instructions and then delete them before releasing the RFx.**

Describe what you want to know.

**Explain clearly and concisely what information you need to help you determine the requirements for your procurement plan.**

When you have completed this Section please remove the YELLOW highlighted areas, and delete all the instructions in **RED**.

### Background

This request relates to [insert a short/general overview and context of a proposed procurement, business or policy that it relates to].

### Key outcomes

Key outcomes are about what we are requesting and why. This [RFx] relates to the possible purchase of [describe the specific goods or services]. The outcomes that we want to achieve are [insert key outcomes in table below].

| #1 | [describe first key outcome / question] |
| --- | --- |
| #2 | [describe next key outcome / question] |
| #3 | [describe next key outcome / question] |
| #4 | [describe next key outcome / question] |

To add new rows to the table, click or tap an existing row, and hit the ‘+’ button that appears on the far right.

### Requirements

Identifying procurement requirements is an important step in the procurement process. It ensures all required goods and services are clearly defined and aligned with organisational objectives.

### Functional requirements

List the **functional requirements** here that you have gathered, that need to be met. [Delete if not applicable]

### Non-functional requirements

List the **non-functional requirements** here that you have gathered, that need to be met. [Delete if not applicable]

### Other

Other sections listed below may need to be added as required depending on your procurement method:

* Relevant procurement details
* Value for money
* Security compliance
* Interoperability
* Detailed information table (may include hyperlinks)
* Details (time, duration, date) of briefings and other communication activities
* Special terms for compliance

## Terms and Definitions

You can find definitions at the end of this Section.

Add relevant **terms** specific to your procurement and organisational policies.

## Definitions

Add **definitions** below that relate to your procurement and requirements.

In relation to the [RFx] the following words and expressions have the meanings described below.

|  |  |
| --- | --- |
| Buyer  | The organisation that has issued the [RFx].  |
| Deadline for Answers | The deadline for the Buyer to respond to questions submitted by a Respondent. |
| Deadline for Responses  | The deadline for delivering or submitting Responses to the Buyer. |
| Deadline for Questions | The deadline for submitting questions to the Buyer. |
| Functional requirements | Functional requirements refer to the specific capabilities, features, and behaviours that a digital health system or technology must have to meet the clinical, operational, and user needs of the organisation. These requirements outline what the system should do to achieve its intended purpose, focusing on the tasks and services it should perform rather than how it should be implemented. |
| Non-functional requirements | Non-functional requirements refer to the characteristics and qualities of a digital health system or technology that define how the system performs its functions rather than what it does. These requirements contribute to the overall user experience and operational efficiency. |
| Open tendering | A competitive bidding procedure that allows suppliers to bid for an organisation’s contract. This method provides the most competition among suppliers and encourages new or emerging vendors to bid and obtain more work. Note that not all who bid are suitable for the contract, especially complex acquisitions, and it takes time to evaluate all the tenders to get the required standard. |
| Point of Contact | The Buyer and each Respondent are required to appoint a Point of Contact. This is the channel to be used for all communications during this procurement process. |
| Respondent  | A person, company or organisation that submits a Response to the [RFx]. |
| Response | The response a Respondent submits in reply to the [RFx].  |
| Response Form  | The form and declaration prescribed by the Buyer and used by a Respondent to respond to the [RFx]. |
| Request for proposal (RFP) | A request for proposal (RFP) announces a project and invites qualified contractors to bid. This is a popular procurement method that allows vendors to offer their goods and services. It involves creating a statement of work outlining the company’s needs, timeline, and instructions for preparing proposals. Vendors typically submit a technical proposal and a sealed financial proposal, which is only opened if the technical proposal is approved. |
| Request for quotations (RFQ) | A Request for quotations (RFQ) also known as an invitation to quote (ITQ) is a simple and quick way to procure small-value, off-the-shelf goods or services. Unlike other methods, it requires minimal paperwork and is non-competitive since the company selects which vendors to request quotes from. Typically, at least three vendors are invited to submit quotes, and the best one is chosen based on how well it meets the requirements. |
| Request For Information (RFI) | A Request for Information (RFI) is a formal process used to gather detailed information from potential suppliers about a good or service. It helps organisations understand the market and identify suitable vendors. The RFI outlines the organisation’s requirements and asks vendors how they can meet them. It helps narrow down potential suppliers and focuses on identifying differences among vendors to address the organisation’s needs and concerns. |
| Single source tendering | A single source tendering process is a non-competitive method where goods or services are purchased from a single vendor. It requires strict management approval before being used. |
| Two-stage tendering | A two-stage tendering process invites bids in two steps:1. Bidders submit proposals with all details except pricing.
2. Selected bidders provide price specifications in the second stage.
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