# PROJECT DEVELOPMENT AND DELIVERY PLAN

**FILE REFERENCE:** AF27045839

**PROJECT A9015**

**LAND 400 – LAND COMBAT VEHICLE SYSTEM FACILITIES PROJECT**

PUCKAPUNYAL MILITARY AREA, BANDIANA, VIC;
ADELAIDE, CULTANA, SA;
TOWNSVILLE, SHOALWATER BAY, SE QLD, QLD

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## Executive Clearance*

I have reviewed this Project Development and Delivery Plan (PDDP) and recommend that it proceed for Executive Review and Approval.

GPCAPT Paul Harte
Position: DNP
Sign: [Signature]
Date: 7.11.16

## Executive Review and Approval

* Refer to the DEQMS for Executive Review and Approval delegations

## ENDORSEMENT

I have reviewed and endorse/do not endorse this Project Development and Delivery Plan (PDDP) in accordance with the Executive Review and Approval Process on the DEQMS.

Name: Mr Bob Baird
Position: DPA
Sign: [Signature]
Date: 7.11.16
ENDORSEMENT
I have reviewed and endorse/do not endorse this Project Development and Delivery Plan (PDDP) in accordance with the Executive Review and Approval Process on the DEQMS.

Name: BRIG Noel Beutel
Position: DGCFI
Sign: ________
Date: _____ Nov 16

APPROVAL
I approve this Project Development and Delivery Plan (PDDP) in accordance with CFI Delegations Business Rule on the DEQMS and endorse it to proceed.

Name: Mr Chris Birrer
Position: FASI

PDDP AMENDMENT LIST

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**CONTACT OFFICER TO COMPLETE**

**FOR:** FIRST ASSISTANT SECRETARY INFRASTRUCTURE

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**DOCUMENT TITLE:** PDDP - LAND 400 LCVS PROGRAM

**DATE SUBMITTED TO FASI OFFICE:**

**DUE DATE:**

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**NOTES:** FASI,

"This is an updated PDDP reflecting endorsed changes to a program approach for L400 LCVS allowing DEC. This will allow the project team to engage a PMCA to consider PDLC studies under a program rather than phased approach. The intent is to engage a new PMCA early 2017 in order to allow approximately ten months for PDLC studies."

CONTACT NAME: LTOC ROB HAERTSCH

**CONTACT NUMBER:** (02) 6266 3563

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**FASI TO COMPLETE**

**COMMENTS:**

- Signed
- 14/11/16
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REFERENCES
A. LAND 400 Phase 2 Land Combat Vehicle System Facilities Project PDDP dated 2 Jun 15
B. Amendments 1 – 6 to LAND 400 Phase 2 Land Combat Vehicle System Facilities Project PDDP dated 2 Jun 15 to 19 July 16
C. Defence Estate Quality Management System
E. AF25642044 LAND 400 / ACR Permanent Facilities Course of Action Analysis Back Brief presented to HMSP-A on 4 Jul 16
F. AF25790928 LAND 400 / ACR Permanent Facilities - Summary of COA Analysis back brief – dated 04 Jul 16

PURPOSE
1. The purpose of this Project Development and Delivery Plan (PDDP) is to detail the LAND 400 Land Combat Vehicle System (LCVS) Facilities project’s:
   a. the need for combining the development and delivery of the Land 400 LCVS Phase 2 and 3 development and delivery;
   b. the scope of the second and third phases;
   c. risks to the development, approval and delivery of scope and the strategy to mitigate these risks;
   d. methods of procurement that are consistent with the Commonwealth Procurement Rules and mandatory Defence policy; and
   e. to obtain Executive approval of the proposed project development and delivery activities, addressing identified risks in accordance with the management arrangements and resources described in this plan.

2. This PDDP supersedes the LAND 400 Phase 2 PDDP (References A and B). This PDDP addresses the combined LAND 400 LCVS Phases 2 and 3 facility requirements with a combined, coordinated and more efficient programmatic delivery approach. The combined LAND 400 LCVS Phases 2 and 3 facilities project is to be referred to as the A9015 LAND 400 LCVS Facilities project.

3. The recommended Evaluation Protocol (available at Reference C) details the policies and procedures which will govern the evaluation of offers. The evaluation criteria for each procurement activity are detailed at Annex A.

4. In accordance with the Capital Facilities and Infrastructure (CFI) Branch Business Rule on Financial Delegations, approval of this PDDP also constitutes an ‘Endorsement to Proceed’ under the Public Governance, Performance and
Accountability Act (*PGPA Act*). Such endorsement, however, does not preclude the requirement for gaining all prerequisite Departmental, Government and / or Parliamentary project approvals and all associated financial approvals under the *PGPA Act*.

**OVERVIEW**

**BACKGROUND**

7. The LAND 400 LCVS capability acquisition background is detailed in the LAND 400 LCVS Facilities Initial Business Case in Section 4 (Reference D).

8. Each LCVS capability requirement will have its own Government First and Second Pass approvals under separate phases outlined below:
COMPLETION OF CURRENT PM/CA SERVICES AND TENDERING FOR COMBINED PHASE 2 AND 3 PM/CA SERVICES

13. Current PM/CA. The expansion of scope, in the order of 250%, is a significant material change. CFI’s PD National Land and the LAND 400 CFI SPO both believe that best outcome for the project requires PM/CA services to the retendered and the current PM/CA Services to be completed at the completion of the Initial Planning Phase and not exercise the options for Planning and Delivery phases. This course of action is recommended to provide transparency with industry, address the significant material change, reflect the new program approach and ensure best
value for money. This approach is supported by the Probity Advisor and the Legal Advisor.

14. CFI will provide tenderers access to the IBC to inform their tender preparation. Given the sensitivities and ongoing independent studies around the future location of the document will only be distributed to tenderers who have signed a deed of confidentiality. This deed will be supplied with the tender documents. The CFI Project Team will conduct an Industry Briefing at the beginning of the tendering period to provide tenderers with background information on the project.

PROJECT SCOPE AND DESCRIPTION
s47(E)(d)
PREVIOUS CONSIDERATION

19. The previous consideration for this project is detailed below;
   a. The CSIR Part 2 was approved on 10 July 2013,
   b. Government First Pass Approval (via NSC) was achieved on 9 Dec 14 for Phase 2 capability only,
   c. IBC endorsed by Capability Manager in Sep 16, and
   d. IBC endorsed by DEC to proceed to Preliminary Detailed Business Case (PDBC) development on 03 Nov 16.

ISSUES AND RISK ASSESSMENT

20. Periodic Risk Management Workshops will be key project milestones during the development and delivery of the works. An initial risk assessment was undertaken as part of the IBC development. This has been updated and tailored to this proposed PDDP as follows:
21. Further risks will be assessed monthly upon engagement of the PM/CA. The PM/CA will be responsible for creating and maintaining a project risk register as per their monthly reporting responsibilities.
PROCUREMENT REQUIREMENTS

Probity Adviser

25. Given the value and risk of the project, CFI contracted to provide Probity services for the LAND 400 Phase 2 Facilities Project. This role was to report and sign-off on the conduct of the tender processes for the following:
   a. PM/CA engagement; and
   b. Invitation to Register Interest (ITR).

26. The probity advisor services required for LAND 400 LCVS Facilities works is substantially the same as for the existing LAND 400 Phase 2 works, with the exception of a PM/CA re-engagement.

27. is recommended to remain the Probity Advisor, and for expediency and value for money, a variation of services will be sought to extend the services to the LAND 400 LCVS Facilities Project (References A and B).

Legal Service Provider

28. was contracted to provide legal services for the LAND 400 Phase 2 Facilities Project. Extension of this engagement for the LAND 400 LCVS Facilities Project will provide efficiencies given the familiarity with the risks associated with the project, their previous work on Phase 2 design brief documents and the need to swiftly complete the PM/CA procurement process in order to meet tight milestones (References A and B). Further, the Legal Services Coordinator at the Directorate of External Legal Services advised that going back to market would be unlikely to represent value for money for the Commonwealth, and that a variation of services to extend the services to the LAND 400 LCVS Facilities Project would be the most appropriate way forward.

Project Manager/Contract Administrator (PM/CA) – required services

29. The PM/CA services required are for development and delivery of the LAND 400 LCVS requirements. As the Project will produce a PDBC and a DBC before delivery, the PM/CA will be required to deliver services in three stages, in accordance with the Scope of Works described in the Defence Infrastructure Panel (DIP):

   a. PDBC:
      (1) Develop project functional requirements through a scope validation exercise at all locations,
      (2) Identify project risks and key issues,
      (3) Engagement and management of the environment and heritage sub consultants,
      (4) Engagement and management of a cost planner sub consultant,
(5) Develop a Planning Study to support a 5% Master Plan Feasibility Report,
(6) Site Selection Board process,
(7) Organise and minute monthly Project Control Group meetings,
(8) Organise and minute quarterly Project Governance Board meetings,
(9) Develop the PDBC for Defence approval, and
(10) Conduct ITR process for the

b. Planning Phase:
(1) Conduct RFT and management of the during planning phase,
(2) Develop 30%, 50 and 90% design reviews,
(3) Manage procurement activities,
(4) Organise and minute monthly Project Control Group meetings,
(5) Organise and minute quarterly Project Governance Board meetings,
(6) Develop the DBC for Defence approval, and
(7) All tasks necessary for Government and Parliamentary Approvals.

c. Delivery Phase:
(1) Management of the during construction delivery,
(2) Organise and minute monthly Project Control Group meetings,
(3) Organise and minute quarterly Project Governance Board meetings, and
(4) Administer Handover and Takeover processes.

30. PDBC works will be broken in to five tasks as milestones for the purpose of tendering:
   a. Task 1 - Start up and engage sub-contractors;
   b. Task 2 - Conduct Planning Study – 5% MPFR at ;
   c. Task 3 - Conduct Planning Study – 5% MPFR at ;
   d. Task 4 - Conduct Planning Study – 5% MPFR at ; and
   e. Task 5 - Develop a P70 Cost Plan and producing a PDBC.
Project Manager/Contract Administrator – Engagement
33. The PM/CA will be engaged via the Defence Infrastructure Panel (DIP) using the PM/CA development sub-panel agreement and scope of services.

34. CFI will issue the PM/CA Request For Proposal (RFP) once First Pass approval is received (Nov 16). There are sufficient funds in the current project development funds to engage a PM/CA for PDBC tasks 1 and 2. Funding for the balance of works for the remaining tasks will be available post-Investment Committee (IC) in Dec 16. CFI will engage the PM/CA for the PDBC task 1 and 2, with the additional tasks subject to funding approval.

35. The engagement of the PM/CA will be conducted as per the process at Reference C, in accordance with the DIP Manual Volume 1 – Engaging Consultants under the DIP, and as summarised under the following task order:

   a. Task 1 – Endorsement to Proceed (PDDP);
   b. Task 2 – Project Team will prepare a "Template 1 Request for Proposal" letter for each member of the PM/CA panel. The Request for Proposal Letter comprises "Template Letter 1 - Annexure A Brief" and "Template Letter 1 - Annexure B Contract Particulars";
   c. Task 3 – DIP members will submit a response in accordance with the process described in the RFP Letter;
   d. Task 4 – The evaluation board listed in Annex B will evaluate the Proposals in accordance with the approved Evaluation Protocol. A Tender Evaluation Board Report (TEBR) will be prepared for delegate approval; and
   e. Task 5 – Project Officer will prepare either a Letter of Acceptance / Letter of Non Acceptance for issue to participants.

36. The RFP evaluation will be subject to comparative analysis and will be assessed using the criteria at Annex A.

37. The PM/CA will be required to provide a fixed price PDBC (broken in to tasks), planning phase and delivery phase fee proposal. Tenderers will provide a Detailed Consultants Activity Proposal (DCAP) in response to RFP documentation issued. The DCAP will not be page limited and will be evaluated against criteria found in Annex A.
Environmental and Heritage Consultants
39. Environmental and Heritage Consultants are required during the PDBC and DBC planning phases to define environmental impacts specifically with regard to the EPBC Act and applicable Defence policy. These consultants will be engaged as specialist sub-consultants to the PM/CA.

40. The PM/CA will be responsible for producing Environmental Reports in accordance with the requirements in Reference C.

CIOG Services
41. Chief Information Officer Group (CIOG) is responsible for the governance and coordination of the Defence Information Environment (DIE) for Defence and on a project-specific basis provides advice, analysis design installation, testing and commissioning of active ICT for CFI Branch.

42. CIOG will be required to assist CFI Branch in the Active ICT Design and procurement associated with this project, and will be engaged for both the Development and Delivery phases of the project.

43. The project will engage CIOG through an existing Customised ICT Request (CIR) that was registered through the CSIR process by Estate Planning Branch. The CIR will carry through the PDBC, DBC and Delivery phases of the project.

44. CIOG will commit to providing services through the development and design phase of the project. In the development phases CIOG will deliver a Project Definition Study (PDS) which will cover Active ICT design, scope, schedule, cost, issues and risks.

45. In the Delivery Phase of the project CIOG will undertake acquisitions for the design and procurement of required equipment, integration into the project’s facilities and for certification and acceptance into service of the active ICT equipment.

46. Active ICT Deliverables from the design to implementation phase will be outsourced through the DISIP Panel to the relevant regional Site Integrator.

RECOMMENDED CONSTRUCTION CONTRACTOR PROCUREMENT STRATEGY
47. This plan evaluates several delivery strategies for works associated with the LAND 400 LCVS Facilities.

48. The following considerations are taken into account in analysing the available delivery strategies:
   a. Timeframe for delivery,
   b. Stakeholder input,
c. Value for money considerations,
d. Commonwealth Procurement Rules,
e. Current project approval status,
f. Scale and scope of the requirement,
g. Resourcing and budget,
h. Obligations and opportunities under other existing arrangements, and
i. Market capacity to competitively respond to the procurement.

**LAND 400 LCVS IIS&S – DELIVERY**

49. The following delivery strategies are available:
   a. Head Contract (HC) (Construct Only);
   b. HC (Design and Construct);
   c. HC (Document and Construct);
   d. Managing Contractor Contract (MCC); and
   e. Public Private Partnership (PPP).
The following Commonwealth policies apply to the procurements for this project:

a. Indigenous Procurement Policy;

b. Building Code 2013 (procurements of construction services only); and
c. Federal Occupational Health and Safety Commissioner (procurements of construction services over $4.0m only).

PROJECT ADVERTISING

78. The encompasses ITR and RFT, and involves competitive approaches to the open market which will be advertised on AusTender.

79. The PM/CA procurement, which involve approaches to the DIP, will not be advertised on AusTender.

EVALUATION OF RESPONSES

80. Responses to the various procurements for this project will be evaluated in accordance with the approved CFI Branch Evaluation Protocol available on DEQMS.

81. When distributing submissions for evaluation, the Chairperson should ensure a suitable Tender Evaluation Pack, based on the approved template on DEQMS, is also distributed to the relevant evaluation board members.

82. The relevant evaluation criteria and weightings for respective procurements are detailed in the annexes to this PDDP.

83. The stakeholders for the project and the membership of the relevant evaluation boards are set out in Annex B to this PDDP.
RECOMMENDATIONS

84. In accordance with the DEQMS, it is recommended that:
   a. DPA and DG CFI endorse this Project Development and Delivery Plan (PDDP);
   b. FASI approve this PDDP including the proposed development and delivery strategy for this project;
   c. FASI authorise DGCFI to approve future routine amendments of this PDDP that materially comply with the development and delivery strategy and procurement methodologies;
   d. FASI approve the use of the standard Evaluation Protocol available on DEQMS for the project; and
   e. FASI approve the evaluation criteria and weighting, as detailed at Annex A, for the:
      (1) Request For Proposal,
      (2) Invitation To Register, and
      (3) Request For Tender.

Paul Harte
Group Captain
Director National Projects

Nov 16

ANNEXES:

A. Evaluation Criteria and Weightings
B. Stakeholders and Evaluation Board Memberships
1. **STAKEHOLDERS**

Key stakeholders for the project are identified in the table below. The Stakeholder Register will be maintained and updated throughout the development of the project.

**Table 1: Project Stakeholders**

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<td>LTCOL Rob Haertsch</td>
<td>Project Director</td>
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<td>MAJ Bernard Jones</td>
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<td>Andrew Triebe</td>
<td>Project Support Officer (Consultant)</td>
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<td>CASG (Sponsor)</td>
<td>COL Anthony Duus</td>
<td>Director Armoured Fighting Vehicles</td>
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<td>Wade Jefferies</td>
<td>LAND 400 Cost Analysis (Consultant)</td>
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<td>LTCOL Gregory Rowlands</td>
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<td>BRIG Haydn Kohl</td>
<td>DG Land Vehicle Systems</td>
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<td>Ms Sarah Myers</td>
<td>DG Combined Arms Fighting System</td>
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<td>Ms Kristy Woodward</td>
<td>Director LAND 400</td>
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<td>LTCOL Adam Hogan</td>
<td>PM Test and Evaluation</td>
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2. EVALUATION BOARD MEMBERSHIPS

Table 2 describes the composition of each Evaluation Board.

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A9015 - LAND 400 LAND COMBAT VEHICLE SYSTEMS (LCVS) FACILITIES PROJECT – PDDP VERSION 2 AMENDMENT 1

References:
A. AF27045839 – A9015 Land 400 LCVS Facilities Project – Project Development and Delivery Plan, approved 14 Nov 16
B. FOI 298/16/17 CN3409084 Item 1

AIM
1. This PDDP amendment reflects changes in the procurement process identified during the drafting of PM/CA RFP, including additions to the Scope of Services and changes to the Project Scope and Milestone Dates.

BACKGROUND
2. The approved strategy at Ref A requires the PM/CA to conduct three planning studies to develop a staged MPFR.
3. During the RFP drafting, contingent clauses were introduced due to the uncertainty surrounding the IC endorsement of a program approach and the necessity for flexibility in PM/CA services.
4. The PM/CA Panel members will not need to sign a deed of confidentiality in order to receive the LAND 400 IBC as an information document. Instead, the IBC will be made available to tenderers at, or immediately after, the Industry Brief.
5. The PM/CA engagement milestone date projected in Table 3 of Ref A has been adjusted to reflect updated timings.

8. In consultation with the Defence Legal team, the services provided by s22(1)(b)(ii) have not materially changed and no actions are required for extending the services of this firm.
ISSUES

9. The structure of the Capability Life Cycle and approvals process will change from January 2017. As such capability supporting projects will not need to present at the Defence Estate Committee; they will inform the Capability Manager Gate Review. It is unclear as to the facilities requirements to satisfy the Capability Manager Gate Review.

PROPOSED AMENDMENTS

10. Paragraph 14 be amended to:

CFI will provide tenderers access to the IBC to inform their tender preparation. CFI will conduct an Industry Briefing at the beginning of the tendering period, to provide tenderers with background information on the project and stress the sensitivities surrounding the future location of the LAND 400 IBC. At or after the Industry Briefing, tenderers will be issued with the LAND 400 IBC as an information document. Before the close of the tender, the tenderers will return the IBC to the Commonwealth and securely destroy any copies. The successful consultant will be re-issued with the IBC on or after the award date.

11. Insert a new paragraph under Paragraph 16:

12. Change the date at Table 3 Serial 7 to March 17.

13. Insert a new paragraph under Paragraph 28:

Project Support Officer Consultant

14. Paragraph 30 be changed to:

During PDBC Phase, the facilities works will be broken into works packages, with pre-agreed variations included for the activation of additional planning study tasks. These tasks will include:

a. start up and engage sub-contractors;

b. conduct planning studies for Works Package 1 -

c. conduct planning studies for Works Package 2 -

d. produce a MPFR informed by the planning studies conducted; and

e. develop a P70 Cost Plan and produce a PDBC.
The pre-agreed variations will be to conduct planning studies for up to six possible scenarios.

An indicative price will be sought to conduct planning studies at fleet be reallocated to this location.

15. Paragraph 31 be changed to:

Tenderers will be required to provide a lump sum fee estimate for the above tasks, with pre-agreed variations for the activation of the additional tasks. This activation will be subject to direction regarding future Army dispositions.

16. Paragraph 32 be deleted.

17. Paragraph 34 be changed to:

CFI will issue the PM/CA RFP on or around 20 Jan 17.

18. Table 1: Project Stakeholders be updated to:

<table>
<thead>
<tr>
<th>Organisation</th>
<th>Name</th>
<th>Position</th>
</tr>
</thead>
<tbody>
<tr>
<td>E&amp;IG - CFI</td>
<td>LTCOL Rob Haertsch</td>
<td>Project Director National Projects</td>
</tr>
<tr>
<td></td>
<td>MAJ Andrew Oxlade</td>
<td>Senior Project Officer</td>
</tr>
<tr>
<td></td>
<td>Andrew Triebe</td>
<td>Project Support Officer (Consultant)</td>
</tr>
<tr>
<td>CASG (Capability Sponsor)</td>
<td>BRIG Haydn Kohl</td>
<td>DG Land Manoeuvre Systems</td>
</tr>
<tr>
<td></td>
<td>BRIG Gregory McGlone</td>
<td>DG Combined Arms Fighting System</td>
</tr>
<tr>
<td></td>
<td>Ms Kristy Woodward</td>
<td>Project Director LAND 400</td>
</tr>
<tr>
<td></td>
<td>LTCOL Garratt Plunkett</td>
<td>Project Manager LAND 400 Land Systems Division</td>
</tr>
<tr>
<td></td>
<td>LTCOL Gregory Rowlands</td>
<td>Project Director LAND 400 Phase 4 ITS and CASG Facilities POC</td>
</tr>
<tr>
<td></td>
<td>Mr Edward Gonzalez</td>
<td>Project Manager LAND 400 Phase 4 ITS</td>
</tr>
<tr>
<td></td>
<td>LTCOL Chris McKendry</td>
<td>Project Manager Test and Evaluation – LAND 400</td>
</tr>
<tr>
<td>AHQ (Capability Manager)</td>
<td>MAJGEN Kathryn Toohey</td>
<td>Head Modernisation and Strategic Planning - Army</td>
</tr>
<tr>
<td></td>
<td>BRIG Christopher Mills</td>
<td>Director General Modernisation - Army &amp; LAND 400</td>
</tr>
<tr>
<td></td>
<td>COL Anthony Duus</td>
<td>Director Armoured Fighting Vehicles</td>
</tr>
<tr>
<td>Name</td>
<td>Role</td>
<td></td>
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<td>----------------------</td>
<td>-------------------------------------------</td>
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</tr>
<tr>
<td>Wade Jefferies</td>
<td>Deputy Director Armoured Fighting Vehicles</td>
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<tr>
<td>LTCOL Paul Wright</td>
<td>SO1 Infrastructure</td>
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<tr>
<td>LTCOL David Robertson</td>
<td>SO1 Armoured Mobility</td>
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<tr>
<td>MAJ John Levers</td>
<td>SO2 LAND 400</td>
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<tr>
<td>LTCOL Gav Ware</td>
<td>SO1 CAV (CRV)</td>
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<tr>
<td>MAJ Jason Holman</td>
<td>SO2 CAV (CRV)</td>
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<td>LTCOL Leo Purdy</td>
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<tr>
<td>Phillip Gowlett</td>
<td>SO Science LAND 400</td>
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<tr>
<td>MAJ John Cottis</td>
<td>SO2 Armoured Development – L8160 / L907-2</td>
<td></td>
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<tr>
<td>LTCOL Scott Jamieson</td>
<td>SO1 Engineer Systems</td>
<td></td>
</tr>
</tbody>
</table>

19. Paragraph 80 include:

Due to the size and complex nature of this project, the evaluation will be significant with large volumes of material to evaluate. As such, the project will seek the services of the AWARD evaluation software that will be procured to aid the evaluation process. The software can be funded within the available development funds at a cost of approximately $10,000. Lisa Drummond, DDPA, will assist the team in establishing the AWARD services and will provide user support during the evaluation. This will also be conducted as a ‘pilot’ for using this program to support CFI Branch high level tender evaluations.

RECOMMENDATION

20. It is recommended that DNP approve the changes to the LAND 400 LCVS Facilities PDDP Version 2, Amendment 01.
A9015 LAND 400 LAND COMBAT VEHICLE SYSTEMS (LCVS) FACILITIES PROJECT – PDDP VERSION 2 AMENDMENT 2

References:
A. A9015 Land 400 LCVS Facilities Project – PDDP, approved 14 Nov 16 (AF27310286).
B. A9015 Land 400 LCVS Facilities Project – PDDP Version 2 Amendment 1, approved 13 Jan 17 (AF27284382).

AIM

1. This PDDP amendment reflects necessary changes in procurement strategy identified during development of the RFP for PM/CA services. In particular, pre-agreed variations were replaced by indicative prices for 7 Bde works; evaluation criteria aligned with DCAP items and the fee estimate for using evaluation support software is updated. It also identifies proposed project team travel during the development stage.

BACKGROUND

2. The approved strategy at Ref A requires the PM/CA to provide pre-agreed variations for PDBC studies in relation to 7 Bde works. Consultation with DPA recommended using indicative prices instead of pre-agreed variations.

3. The format for evaluation criteria changed with the new 2017 DIP RFP template. IAW Probity Advisor recommendations, the evaluation criteria were aligned with the relevant components of the DCAP, detailed in item 9 of the RFP and updated in Annex A of Ref A. The content of the criteria and weightings has not changed.

4. Ref B amended the evaluation methodology to include the use of secure, web-based evaluation support software AWARD® with an initial cost estimate of $10k. Commerce Decisions Pty Ltd has provided an indicative proposal to use AWARD® for the PM/CA evaluation with an upper limit fee estimate of $15k.

5. All travel-related expenses incurred by CFI Branch personnel for projects currently in planning / development are to be assigned to a project budget instead of the CFI travel budget (effective FY 2016/17). Approval has been sought through the Land 400 Capability Manager to approve using development stage funds for CFI travel expenses.
RECOMMENDATIONS

10. It is recommended that DNP approve the proposed changes, at paragraphs 6 to 9, to the LAND 400 LCVS Facilities PDDP, Amendment 02.

R Haertsch
LT COL
PD NP(L)
BP26-1-B107
Ext: 68363
robert.haertsch@defence.gov.au
27 Feb 17
Hi

As discussed today Defence accepts the below proposal. We will discuss the project specifics in the telephone meeting scheduled for tomorrow.

Kind Regards

Lisa Drummond

Deputy Director
Quality and Compliance
Directorate of Program Assurance
Capital Facilities and Infrastructure Branch
Infrastructure Division

Phone - (02) 6266 8229
Facsimile - (02) 6266 8192
Mobile - (02) 6266 8192

Brindabella Park - BP26-01-B084

Email - lisa.drummond@defence.gov.au

Hi Lisa

Please find attached our indicative proposal to support the PMCA tender. Given this is an opportunity to test AWARD, 

As a test,

If you require any additional information, please do not hesitate to contact me.

Regards
Thanks - Estimate no longer than 4-6 weeks

Lisa Drummond

Deputy Director
Quality and Compliance
Directorate of Program Assurance
Capital Facilities and Infrastructure Branch
Infrastructure Division

Phone - (02) 6266 8229
Facsimile - (02) 6266 8192
Mobile - (02) 6266 8229

Brindabella Park - BP26-01-B084

Hi Lisa

That all sounds fine – I’ll put together a ROM proposal for you and get it across tomorrow morning. One question – how long will the evaluation go for?

Regards
Hi

Can I seek from you an indicative quote for using AWARD pls on a project. As mentioned last year we are looking at testing the system over some standard CFI projects and as such we have a PMCA tender that we would like to use as a Pilot.

It will be across possibly 13 companies, two evaluation Schedules (Methodology and Key Personnel) and with 5 users.

The project would be looking to start their evaluation 1 Mar 2017 with the uploading of the two Schedules to occur 27 Feb 2017.

Happy to chat further to give context if needed.

Lisa Drummond

Deputy Director
Quality and Compliance
Directorate of Program Assurance
Capital Facilities and Infrastructure Branch
Infrastructure Division

Phone - (02) 6266 8229
Facsimile - (02) 6266 8192
Mobile -

Brindabella Park - BP26-01-B084

Email - lisa.drummond@defence.gov.au

This email has been scanned by the Symantec Email Security.cloud service. For more information please visit http://www.symanteccloud.com
**COMMERCE DECISIONS**

- **7.00 AM**
  - Meeting
  - Topic: 
  - attendees: 

- **7.30 AM**
  - More meetings

- **8.00 AM**
  - Discussion about the new project

- **8.30 AM**
  - Presentation on the latest market trends

- **9.00 AM**
  - Workshop on budget planning

- **9.30 AM**
  - Review of the previous quarter's financial reports

- **10.00 AM**
  - Team-building activity

- **10.30 AM**
  - Meeting with suppliers

- **11.00 AM**
  - Review of the company's annual report

- **11.30 AM**
  - Breakfast meeting

- **12.00 PM**
  - Lunch

- **12.30 PM**
  - Meeting with stakeholders

- **1:00 PM**
  - Discussion on the company's strategic plans

- **1.30 PM**
  - Meeting with the legal team

- **2.00 PM**
  - Review of the company's sales performance

- **2.30 PM**
  - Meeting with the IT department

- **3.00 PM**
  - Summary of the day's decision-making

- **3.30 PM**
  - Preparation for tomorrow's meeting

- **4.00 PM**
  - Meeting with the finance department

- **4.30 PM**
  - Review of the company's financial statements

- **5.00 PM**
  - Meeting with the executive team

- **5.30 PM**
  - Freelance work for delegate approval

- **6.00 PM**
  - Early departure

- **6.30 PM**
  - Meeting with the sales team

- **7.00 PM**
  - Meeting with the marketing team

- **7.30 PM**
  - Meeting with the human resources department

- **8.00 PM**
  - Meeting with the customer service team

- **8.30 PM**
  - Review of the day's work

---

**Culture is the KEY to understanding the new work health and safety laws**

One Defence Leadership: I take calculated risks by making judgements about what risks are necessary and acceptable to deliver the outcome.

Colleagues acting strangely? Report patterns of concerning behaviour to the AGW.

---

**August**

- Meeting on the company's upcoming projects

**September**

- Discussion on the company's quarterly report

**October**

- Meeting with the board of directors

**November**

- Meeting with the executive committee

**December**

- Review of the company's annual report

---

**Events of Interest**

- Battle of Long Hoi, South Vietnam 8 RAR and 1 Arm Regt (1970)

---

**Calendar**

- Monthly events and meetings scheduled

---

**FOI 298/16/17**

**CN3409084**

**Item 5**

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**Page 53 of 67**
# Request for Purchase Order or Outline Agreement

**Step 1:**
Have the goods or services already been received?  
- Yes  
- No  

If 'Yes' a Purchase Order can not be raised as it is against Defence Policy to raise a ROMAN order after the goods have been received.

Refer to FINMAN 1 - 6.1.2

**Step 2:**
The Defence Purchasing Card (DPC) is to be used for purchases of $10,000 or less, unless there are valid reasons for not doing so (Refer to Accountability Authority Instructions (AAI) 6.3.1.3)

Is this purchase $10,000 or less?  
- Yes  
- No

Will vendor accept credit card?  
- Yes  
- No

It is Defence policy, that if vendor will accept credit card and the purchase is low risk, low value then a Defence Purchase Card is to be used and an AC977 - Defence Purchasing Card Purchase Authorisation is to be completed.

Refer to AC 977 - Defence Purchasing Card Purchase Authorisation

Refer to AAI 5 - Commonwealth Credit Cards and Credit Vouchers and AAI 6 - Making Payments of Relevant Money

**Step 3:**
Enter a reference number. NOTE: This is compulsory when using shared services and should be a unique identifying number to allow tracking and follow up of this request.

Reference no.

**Step 4:**
AusTender reporting
- If the purchase is greater than or equal to $10,000 AUD (inc GST) or requires an exemption, you are required to complete form AE 108 - AusTender Reporting.

**Step 5:**
Access the SA 405 form by clicking on the 'Go to form' button.

**Step 6:**
If using Shared Services (Finance Data Centre)

Email the completed form to: ROMAN.Purchaseorders@defence.gov.au or Fax to: (02) 6127 8853.

For HELP completing this form please email: FDC.CustomerEnquiries@defence.gov.au or Phone (08) 8287 9195

Reference no.: A9015
Department of Defence

Request for Purchase Order or Outline Agreement

- You MUST complete AE 108 - AusTender Reporting for purchases greater than or equal to $10,000 AUD (including GST).
- This form itself does not constitute a contract (it is only a request to raise a purchase order or amendment).
- For complex and strategic procurement - all necessary approval documentation and the contract must be in place before a Purchase Order is raised.

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<th>Create Outline Agreement</th>
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Vendor name: [Redacted]
Vendor email address: [Redacted]
Postal address (Street address): [Redacted]
Vendor ABN: [Redacted]
Vendor no.: [Redacted]

Are there prepayment components in this purchase? (See definition on page 1 of instructions and definitions.)
- Yes
- No

Prepayment start date: [Redacted]
Prepayment end date: [Redacted]
Line number: [Redacted]

Value Based Order (VBO)?
- Yes
- No

Company code: 1000
Outline agreement number: 1
Line number: [Redacted]

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<th>WBS (Stat WBS must be used in conjunction with a Cost Centre)</th>
<th>Fund</th>
<th>ESP</th>
<th>IO</th>
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<th>Quantity</th>
<th>Price per item (ex GST)</th>
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<td>P</td>
<td>On</td>
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<td>N/A</td>
<td>A9015P-01-01</td>
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<td>$15,000.00</td>
<td>$1,500.00</td>
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Comments to be recorded on the Purchase order (within ROMAN)
A9015 Land 400 LCVS Facilities Project - PMCA tender evaluation - AWARD evaluation support software and associated services. Price is upper limit fee estimate.

Comments / General instructions (to processors in Shared Services):

AusTender reporting requirements

Reference no.: A9015
## Delivery and payment details

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<td>14 Apr 2017</td>
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### Accounts payable contact and invoice approval (for ISIS invoices) (Person who will authorise invoice for payment)

<table>
<thead>
<tr>
<th>Name</th>
<th>Location</th>
<th>Phone no.</th>
<th>Fax no.</th>
<th>Email</th>
</tr>
</thead>
<tbody>
<tr>
<td>Andrew Oxlade</td>
<td>Brindabella Business Park (BP26-1-B097)</td>
<td>02 6266 8174</td>
<td></td>
<td><a href="mailto:andrew.oxlade@defence.gov.au">andrew.oxlade@defence.gov.au</a></td>
</tr>
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</table>

### Purchase order contact and delivery address

<table>
<thead>
<tr>
<th>Name</th>
<th>Location</th>
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<th>Email</th>
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</tr>
</tbody>
</table>

### Requesting officer

<table>
<thead>
<tr>
<th>Name</th>
<th>Location</th>
<th>Phone no.</th>
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<th>Email</th>
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</tr>
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### Estate and Infrastructure Group

<table>
<thead>
<tr>
<th>Branch</th>
<th>Capital Facilities &amp; Infrastructure Branch</th>
</tr>
</thead>
</table>

### Total funds required (GST inclusive)

$16,500.00

### Section 1

Is to be signed where an official has NOT exercised delegations elsewhere. Where delegations have been exercised elsewhere, Section 2 must be completed.

#### Commitment Approver (FINMAN 2 - schedule 1)

<table>
<thead>
<tr>
<th>Signature</th>
<th>Printed name</th>
<th>Position title</th>
<th>Rank or level</th>
<th>Position number</th>
<th>Employee ID</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>R Haertsch</td>
<td></td>
<td>PD NP(L)</td>
<td>LTCOL</td>
<td>00418943</td>
<td>$22(1)</td>
<td>28 Feb 17</td>
</tr>
</tbody>
</table>

#### PGPA Act Section 23(1) Delegate (FINMAN 2 - schedule 2)

<table>
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<tr>
<th>Signature</th>
<th>Printed name</th>
<th>Position title</th>
<th>Rank or level</th>
<th>Position number</th>
<th>Employee ID</th>
<th>Date</th>
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<td>LTCOL</td>
<td>00418943</td>
<td>$22(1)</td>
<td>28 Feb 17</td>
</tr>
</tbody>
</table>

**Note:** All fields must be completed correctly or shared services will reject form e.g. Position Title, Rank/Level, etc.

### Section 2

The Authority below is only required to be signed where delegations have NOT been exercised in Section 1 above and have been approved elsewhere:

I confirm that the required officials have sighted and approved the contents contained within this Webform; and I confirm that this Purchase Order is being raised in accordance with the Commitment Approver and PGPA Act Section 23(1) Delegate approvals.

### Purchase Order Requesting Officer

<table>
<thead>
<tr>
<th>Signature</th>
<th>Printed name</th>
<th>Position title</th>
<th>Rank or level</th>
<th>Position number</th>
<th>Employee ID</th>
<th>Date</th>
</tr>
</thead>
</table>

**Note:** Where Shared Services are being utilised to raise this Purchase Order a copy of the signed delegations are attached to support this request.
AusTender Reporting

Instructions

Defence must report on the Department of Finance's website AusTender (www.tenders.gov.au):

- All new standing offer panel arrangements and amendments to these arrangements;
- All contracts for the procurement of property or services, including contracts raised under a standing offer arrangement, and agency agreements, valued at $10,000 AUD or more (GST inclusive); and
- All contract amendments valued at, or that increase the value of the contract to $10,000 AUD or more (GST inclusive), must be published on AusTender.

For further information please refer to: AusTender Publishing: and Department of Finance (DoF) Guide to Buying for the Australian Government.


The contract description should be concise, meaningful and an accurate reflection of the goods and services being procured. It must not include names of people or suppliers or other personal information which may breach legislation or policy (eg Privacy Act 1988) or reported elsewhere in the record (eg start and end dates). The records should not contain acronyms, definitions, internal references or redundant text (eg 'the purpose of the contract').

You should report the start date identified in the contract. If there is no start date identified, you should report the date the contract was signed. If there is no written contract, the date of the first provision of property or services under the contract should be reported. For the purposes on AusTender, the end date should reflect the date that the performance of the contract is expected to be completed (noting that this is an estimate). The end date should not take into account any options, extensions, renewals, or other mechanisms that may be exercised to extend the period of the contract.

Fields marked with * are mandatory, and must be completed before signing or submission.

Contract reporting

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<tr>
<th>Type: *</th>
<th>Vendor name *</th>
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</thead>
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<tr>
<td>Amendment</td>
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<table>
<thead>
<tr>
<th>Description *</th>
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<tr>
<td>Tender evaluation software and support services</td>
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<table>
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<tr>
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<th>Planned contract end date *</th>
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<tbody>
<tr>
<td>Printed name *</td>
</tr>
<tr>
<td>MAJ AH Oxlade</td>
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20 Feb 17, 11:25:02

Defending Australia and its National Interests
www.defence.gov.au
Commitment Approver Delegate

I confirm that the information provided is an accurate reflection of the contract/amendment and is authorised for release to the general public. Where necessary I have consulted internal guidance as available at the Defence Procurement Policy Manual (Chapter 5.8) and the AusTender Publishing website.

<table>
<thead>
<tr>
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<td>LTCOL</td>
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<td>Project Director</td>
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<table>
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<tr>
<th>Printed name</th>
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</thead>
<tbody>
<tr>
<td>ROBERT HAERTSCH</td>
<td>28 Feb 2017</td>
</tr>
</tbody>
</table>

Signature

Information from this form is entered directly into ROMAN, MILIS or CMS and must be provided to the area processing the ROMAN, MILIS or CMS data entry with appropriate documentation (e.g. the CMS Account Holder, the Finance Data Centre, or the ROMAN Purchase Order Creator).

Entered on ROMAN, MILIS or CMS

<table>
<thead>
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<table>
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<th>Position number</th>
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<td>3</td>
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<tr>
<td>4</td>
</tr>
<tr>
<td>5</td>
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</tbody>
</table>

**Note:** The table contains a list of item details with specific fields such as Item, Serial, Data Type, Description, and Value. The data types include String, Integer, Boolean, and DateTime.
SECTION 23 COMMITMENT APPROVALS FOR THE PROCUREMENT OF
AWARD - SOFTWARE AS A SERVICE (SAAS) AND ASSOCIATED CONSULTANT
SERVICES TO SUPPORT THE DEFENCE INFORMATION COMMUNICATION
TECHNOLOGY PANEL ARRANGEMENT TENDER PROCESS

References:
B. Award and Defence – Lessons Learned
C. CD Proposal – CIOG ICTPA

RECOMMENDATIONS

That you:

(i) APPROVE the commitment and expenditure of relevant money under Section 23 of the Public Governance, Performance and Accountability Act, for Software as a Services (SaaS) – AWARD and associated Consultant Support Services up to $190,000.00 (inclusive of GST) with Commerce Decisions, ABN 14 605 339 580.

(ii) CONFIRM that the arrangement will be a proper use of relevant money, promotes the achievement of the purposes and financial stability of the entity and is not inconsistent with the policies of the Australian government.

BACKGROUND (CORE)

1. The Chief Information Officer Group (CIOG), within Department of Defence (Defence), is responsible for ensuring that Defence has a dependable, secure and integrated Defence Single Information Environment (SIE) to support defence business and military operations.

2. The SIE encompasses the computing and communications infrastructure of Defence along with management systems and people that deliver that infrastructure. It includes Defence’s computing networks, business applications and the data that they generate and carry. It includes the communication standards and spectrum required for Battle-space networks. The infrastructure CIOG provides is essential and integral to core Defence functions including intelligence, surveillance, reconnaissance, communications, information warfare, logistics, command and management.
3. To achieve these outcomes, Defence has a high reliance on Information Communication Technology (ICT), and CIOG engages with industry partners in strategic relationships to maximise value and sustainability, underpinned by a contractual framework that delivers efficient and effective outcomes upon which Defence can rely.

4. CIOG is in the process of planning and engaging with Industry for a new ICT panel that will be known as the ICT Provider Arrangement (ICTPA). The ICTPA will replace the current Applications Managed Services Provider Arrangement (AMSPA) as well as support the future ICT requirements of Defence. ICT, in this context is a broad term for the scope of development, delivery, transition into service and Business as Usual tasks across the Defence SIE.

5. Commercial and Business Enablement Branch (CBE) is seeking Software as a Service (SaaS) and contracted support to provide tender evaluation software to assist with the evaluation of tendered responses to the ICTPA up to the value of $190,000 INC GST. The need for evaluation software has been identified to facilitate expedient and efficient tender evaluation and minimise tender evaluation.

6. This procurement is not considered a remote procurement or is a domestic procurement valued at below $200K. In accordance with the IPP and as stated in DPPI 1/2015 the mandatory set-aside does not apply to this procurement.

CONSIDERATIONS INCLUDING VALUE FOR MONEY ASSESSMENT

7. No Evaluation software is available for use on the Defence Protected Network (DPN). The costs of developing suitable DPN based MS Office systems to facilitate the evaluation are considered to outweigh the costs for the acquisition and use of purpose specific evaluation tool.

8. This will deliver value for money as it provides a web-based evaluation tool that will enable efficient evaluation and robust tender data management for the evaluation team. All data is held in a secure data centre hosted by Sliced Tech which has been certified for Defence by the Australian Signals Directorate (ASD). The SaaS solution supports strategic business applications for procurement and supplier review and provides a secure centralised approach to data management, ease of progress reporting and evaluation report compilation.

9. This procurement will be a Limited Tender procurement method under the following circumstances:
   a. No tenderers satisfied the conditions of participation from research of previous procurements of a similar nature. (CPR 10.3 a, iii)
   b. When the goods and services can be supplied only by particular business and there is no reasonable alternative or substitute due to an absence of competition for technical reasons(CPR 10.3 d, iii)

10. Prior Contracts for this service have been engaged through both the CAS-SS panel and directly via an AUSTENDER Short Form Template.
13. The proposed procurement is subject to the additional rules for procurements at or above the relevant procurement threshold as detailed in Division 2 of the Commonwealth Procurement Rules (CPRs) and is not subject to an exemption.

14. The following relevant value for money requirements have been sufficiently addressed in accordance with paragraph 4.4 of the CPRs.
   a. Other procurement activities have been released to the market and no other company is able to provide this level of service. (CPR 4.4a)
   b. This will provide a structured decision making process which will result in decisions that are rigorous, robust and defensible. (CPR 4.4b)
   c. Will promote the adoption of open and fair assessment processes in line with best practice and procurement legislation. (CPR 4.4c)
   d. It will remove much inefficiency of paper-based approaches, promote informed decision making through provision of real-time progress and analysis reports (CPR 4.4d).

15. The following relevant value for money requirements of Quality, fitness for purpose, relevant experience and performance history have been sufficiently addressed in accordance with paragraph 4.5 of the CPRs based on the following:
   a. Having a centralised record of the evaluation that was accessible to all evaluators, where all information was stored, and reports could be created from a ‘single source of truth’;
   b. Time savings through not having to distribute, maintain and consolidate separate spreadsheets or worksheets amongst the evaluators;
   c. Evaluation guidance can be made readily available through AWARD for evaluators, ensuring consistency in the application of criteria in the evaluation process;
   d. As evaluators, can access AWARD from different, pre-approved locations, cost and time savings benefits can be achieved through not having to bring all evaluators to a single location for the duration of the evaluation work;
   e. Ability to monitor evaluators’ progress in real time, and prepare complete progress reports for senior stakeholders;
   f. All documents are accessible electronically through AWARD, saving time and resources in not having to print multiple copies of the RFT material, tenderers’ responses and related material; without need to manage hard copies;
g. Creation of reports that were tailored to the projects’ reporting requirements, and can be stored within AWARD as templates, allowing them to be run at any time from the evaluation records.

**Funds Availability**

16. The quoted price is identified at $100,000 INC GST and CBE is seeking approval for $190,000.00 INC GST to cover additional anticipated costs being increased number of users, increase in time period or additional support as outlined on page nine of the quote.

17. The funding identified is adequate for the proposed commitment and expenditure and is consistent with the purpose for which it was allocated.

18. The following financial codes will be used for this procurement:

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<thead>
<tr>
<th>Account Code:</th>
<th>Cost Centre:</th>
<th>WBS:</th>
<th>Fund No:</th>
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<tbody>
<tr>
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<td>200106</td>
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<td>70495</td>
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</table>

19. Contingency is not being used to fund the proposal.

**Table 1. Planned Spread of Commitment and Expenditure**

<table>
<thead>
<tr>
<th>FY</th>
<th>16/17</th>
<th>17/18</th>
<th>Total</th>
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</thead>
<tbody>
<tr>
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<td>Commitment (excl. GST)</td>
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<td>Total</td>
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</table>

**Specialist Advisors**

20. **Financial Advice**

Specialist Financial Advice has been obtained on the financial aspects of the proposed commitment of relevant money. The following authorities have been consulted in the preparation of this submission:

a. Lise Owens

**Jon Earle**
ICT Vendor Manager
Strategic Commercial Engagement (Tier 2 and 3)
Commercial and Business Enablement Branch
23 January 2017

Enclosures:
A. Draft Contract
B. Quotation
C. AE643
SPECIALIST ADVICE - FINANCE

As Specialist Advisor Finance I confirm:
- the sufficiency of the budget;
- the soundness of the costing calculations; and
- the accuracy of the costing calculations.

(Signature) (Printed Name) (PMKeys No) (Appt/Position No) (Date)

SECTION 23 – COMMITMENT APPROVAL

As Section 23 - Commitment Approver I confirm that:
- I have an appropriate delegation and I currently hold the required procurement competency to exercise this delegation;
- the arrangement will be a proper use of relevant money;
- I have taken care and diligence and have made reasonable inquiries to ensure this arrangement meets all required procurement obligations, notably the Commonwealth Procurement Rules, the Accountable Authority Instructions, the Defence Procurement Policy Manual, applicable Departmental Procurement Policy Instructions and is not inconsistent with the policies of the Australian government;
- the benefits of entering into the arrangement outweigh the risk of locking away future budget flexibility;
- the costing assumptions are sound and costing calculations are accurate;
- I am acting in good faith and for proper purpose;
- I do not stand to gain advantage for myself or other persons or cause detriment to Defence, the Commonwealth or any other person;
- any real or perceived conflict of interest has been disclosed

(Signature) (Printed Name) (PMKeys No) (Appt/Position No) (Date)