



WATER SERVICES
ASSOCIATION OF AUSTRALIA



TECHNOLOGY INNOVATION PROGRAM

Request for Proposal



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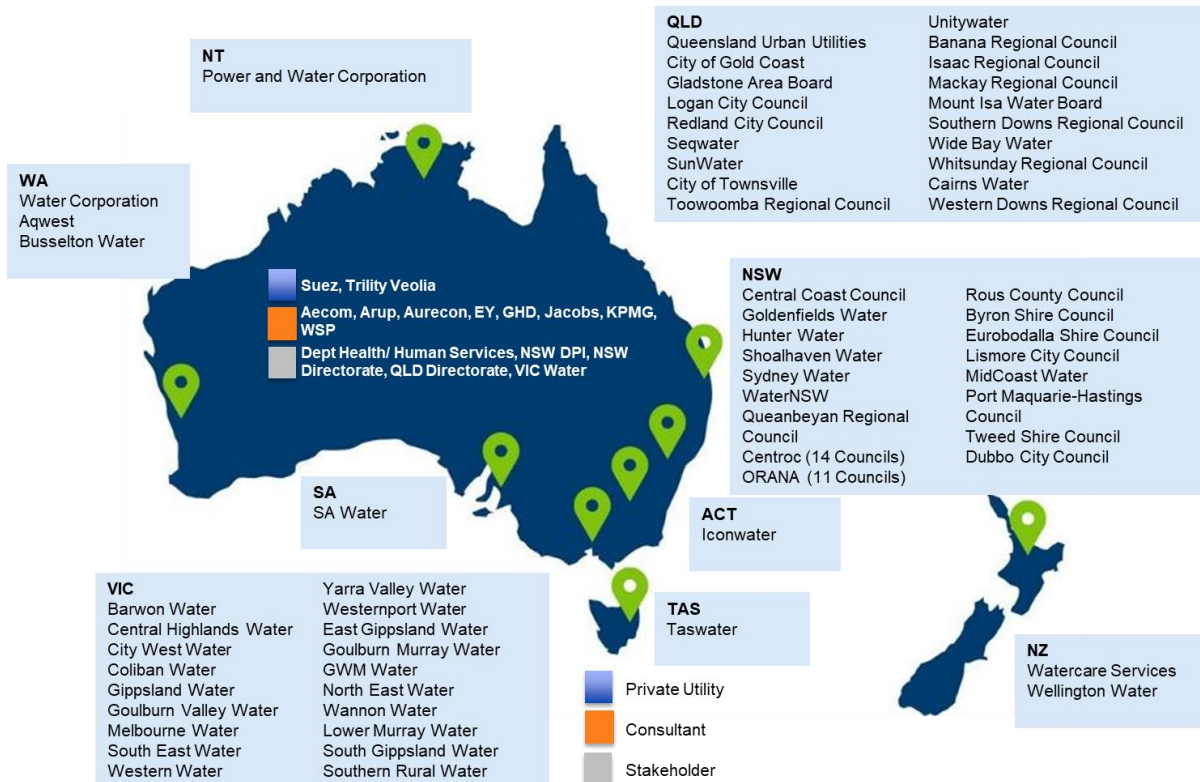
1. INTRODUCTION

The Water Services Association of Australia (WSAA) is the peak industry body representing the urban water industry. Our members provide water and sewerage services to over 20 million customers in Australia and New Zealand and many of Australia's largest industrial and commercial enterprises.

Based around our vision of 'customer driven, enriching life', WSAA facilitates collaboration, knowledge sharing, networking and cooperation within the urban water industry. We are proud of the collegiate attitude of our members which has led to industry-wide approaches to national water issues.

WSAA was formed in 1995 as a non-profit organisation to foster the exchange of information between industry, government and the community, and to promote sustainable water resource management. In 2017, WSAA made a commitment on behalf of its members to play its part in advancing the Sustainable Development Goals. WSAA will continue to lead the industry in using the Goals as a lens to frame the broader contribution that urban water makes to a prosperous, sustainable and equitable society.

WSAA members include 67 utilities (this includes 2 regional organisations of councils 'ROCs' servicing 25 small council utilities and 3 private utilities) which vary greatly in terms of size, function and region.



1.1 Background

WSAA seeks to continually improve its approach to innovation via the development of an innovation strategy for the industry which outlines how we can create a stronger innovation ecosystem that continues to improve liveability and industry outcomes. WSAA's vision for innovation is described in the WSAA Innovation Strategy. The Strategy is available on request.

A strong pathway for technology identification, evaluation and adoption is a key element to the delivery of an innovative water utility.

WSAA members access a number of global innovation platforms and tools to improve business outcomes through technology awareness, evaluation and adoption. The primary platform available to WSAA members to date is the Technology Approval Group (TAG) platform run by Isle Utilities as well as programs such as the Leaders Innovation Forum for Technology (LIFT) run by Water Research Foundation. In addition, WSAA members utilise a number of other platforms in their own right, which may assist with technology evaluation, selection and adoption in different ways.

In line with the WSAA Innovation Strategy, it is recognised that a more holistic and strategic approach to technology adoption is required by WSAA members which:

- improves alignment of technology solutions to industry needs;
- enhances the process for technology adoption;
- develops tailor-made solutions that can accommodate differences in the needs of utilities (this includes size, function and geographic location);
- enables capacity building within the industry;
- facilitates and enhances knowledge sharing; and
- makes the industry more attractive to technology developers.

The current TAG program is nearing the completion of its current contract. To ensure that we best serve the needs of our members now and into the future, WSAA is seeking interest for the delivery of a Technology Innovation Program from January 2020. This RFP has been informed by significant work undertaken by WSAA in understanding the needs of the membership.

2. DESCRIPTION OF SERVICES

2.1 Overview

WSAA is seeking a consultant or consortia to deliver our Technology Innovation Program.

2.1.1 Objectives of the Program

WSAA members are looking for a Technology Innovation Program that will assist the industry by raising awareness of technologies and enable best practice decision making now and into the future, with the overarching aim of uplifting customer service and value. To meet this objective we require a program that provides:

- A long term, strategic approach to technology evaluation that is also flexible enough to capture opportunities/emerging offerings.
- Awareness and evaluation of new and emerging technologies that may meet current or future need.
- Opportunities for sharing and engagement across the water industry to learn from each other and avoid duplication of effort.
- Opportunities to validate the suitability of technologies for specific needs.
- Accessibility, ease of use and value for money.
- A bespoke solution that is flexible enough to meet the needs of the different water utilities.

2.1.2 Utility Membership

The Technology Innovation Program will be undertaken as a WSAA subscription program, whereby WSAA members will have the option to participate at a fee. Eligible members include both private and public urban water utilities across Australia and New Zealand who range in size and structure, and as such, will have a diverse range of needs. Those who will participate in the program are referred throughout the RFP as 'subscribing members'.

Extensive stakeholder consultation with the members has been undertaken in developing this RFP to understand their needs. A key finding from the consultation is that the Technology Innovation Program would need to be fit for purpose to meet the needs of a diverse membership (i.e. a one size fits all approach would not suit the membership).

For the purposes of this RFP, it could be assumed that there would be three membership tiers who have quite different needs. The proposal should articulate how these differences would be accounted for. Key attributes as noted in the member consultation are described below.

- Tier 1 entities (large size, well developed technology program)
 - May cover a large geographic range, service large cities and have varied responsibilities (e.g. bulk supplier, integrated services, etc. which may all have varying needs).
 - Often have a well-developed in-house technology program and undertake feasibility assessments or independent trials (the Technology Innovation Program would need to complement this).
 - Often willing to consider more cutting edge, novel solutions with lower technology readiness scores. It is likely that the organisations have already investigated, trialled or installed more mature solutions.
 - May require a more bespoke service and in-house engagement to meet specific needs or challenges faced.
 - While they may be well resourced, their size means that they often face challenges in engaging and tracking technology activities within the utility.
- Tier 2 entities (medium size, emerging technology program)
 - Often service mid-sized cities or regions.
 - The Technology Innovation Program is likely to form the central component of their technology program (with some other technology activities also likely).
 - Seek innovative solutions however cost and practicality is a major factor.
 - Resourcing and engaging the broader utility is often a challenge.
 - Likely to consider and benefit from joint trials (with less capacity to trial individually).
- Tier 3 entities are (smaller sized, less developed technology program):
 - Fairly small regional or council sized utilities.
 - Limited resources.
 - Technology Innovation Program will be most if not all of the utility technology effort.
 - Interested in understanding innovative opportunities, however most interest in practical technologies that are easy to implement.
 - Tend to value technical solutions with higher technology readiness level scores.
 - Most effort targeted at learning and leveraging from experiences of others but may trial if it meets a current need.
 - Travel often a barrier.
 - Small size often means they are often fairly agile with testing and implementing solutions.
 - Need to ensure their needs are not lost if offering a more bespoke focus for larger members.

The respondent will need to demonstrate that the proposed service offering can meet the requirements of these different members. Note that this is a starting concept, respondents are welcome to suggest an approach they believe will offer the best member value.

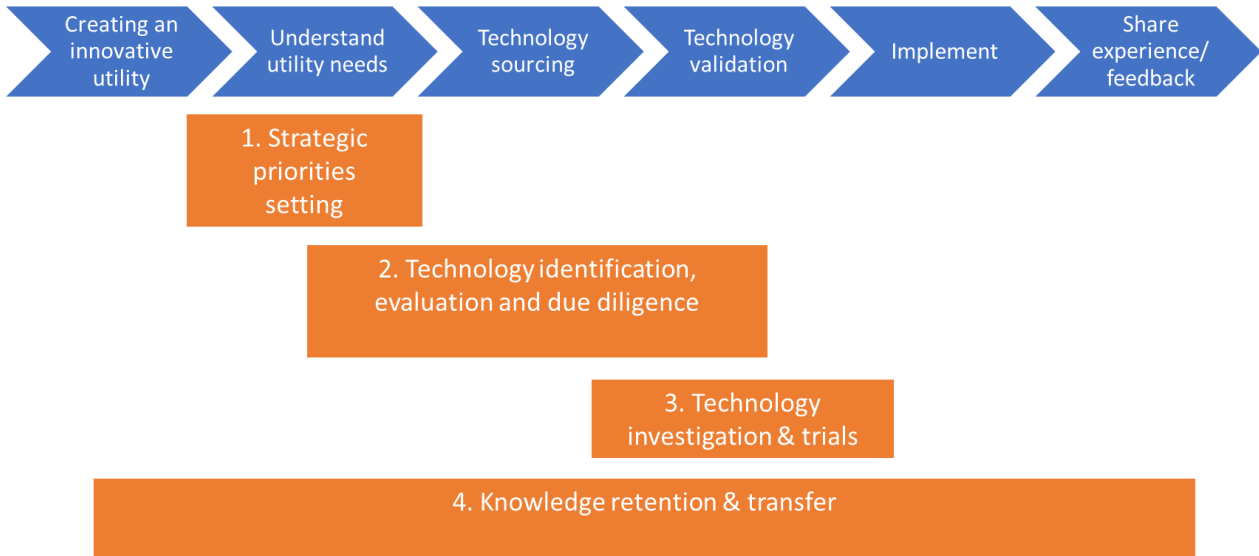
2.1.3 Program Overview

The brief covers four key Activity areas which will assist utilities along the process of technology needs setting, identification, evaluation and adoption:

- 1) Strategic priorities setting
- 2) Technology identification, evaluation and due diligence
- 3) Technology investigation and trials
- 4) Knowledge retention and transfer

A fifth Activity is also included in this RFP to give respondents the opportunity to include value adds to outcomes which may not be captured across the four Activities.

The program supports our innovation delivery map (blue arrows below) as shown by the orange boxes.



The initial contracting period is for four years commencing in January 2020, with the option for a possible two year extension whereby agreed to by both parties. The program will be reviewed annually against a set of agreed KPIs.

2.1.4 Approach to RFP

The key outcomes, indicative approach and deliverables of each activity are outlined below. To be successful your submission is required to detail as a minimum:

- The proposed approach and methodology for each Activity (and any differences in approach for Tiers of membership).

- Key personnel and their indicative hours allocated to each part of the program.
- Indicative costings for the approach broken down by Activity and in as much detail as possible on steps (See Schedule 5).

See Section 6.5 for more details on the evaluation process and Appendix A for proposal guidelines.

While WSAA has outlined an approach and deliverables for each Activity, these are indicative only to guide submissions on the breadth/scope of the task. We welcome submissions that put forward innovative and novel methods to deliver on the key objectives. In addition, Activity 5 allows submissions to propose value-adds to the service offering.

2.2 Program Activities

Activity 1. Strategic priorities setting

"We need technologies that strongly align to our needs, now and into the future" - Tier 1 Research & Innovation Manager, 2019

Objective:

This activity aims to provide strategic direction for the Technology Innovation Program (referred to in this RFP as a 'technology roadmap'). The technology roadmap will establish the direction for technology needs and identify associated opportunities or gaps in the market for further investigation. The strategic priorities need to take into account the needs of WSAA subscribing members at a number of different levels:

- A higher industry level overview to set industry direction and align with established national strategies/priorities from WSAA.
- Detailed technology needs to deliver the high level industry direction.
- Identification of bespoke technology needs that may be required for certain members (particularly those that are very large, small or unique in terms of geography, size, function, etc).

Indicative approach

- Undertake strategic priorities setting on an annual basis through the development of a technology roadmap in collaboration with subscribing members. This roadmap is expected to involve extensive consultation with a combination of quantitative and qualitative information collection methods (e.g. face to face meetings, telephone interviews, online survey, industry workshop). Year 1 would most likely require a more in-depth process than subsequent years.
- Ongoing review and monitoring of progress against the technology roadmap.

Indicative deliverables

- An annual industry strategic priorities workshop.
- An agreed technology roadmap(s) that covers the requirements above and sets the strategic pathway for the program going forward.
- Meeting minutes and a summary of the outcomes of all surveys/interviews.
- Reporting against the technology roadmap (e.g. an annual report or similar) that summarises at a minimum the technologies that have been validated, how these relate to the technology roadmap and technology uptake.

Activity 2. Technology identification, evaluation and due diligence

"It's not just about technology adoption - it's about sound decision making." Tier 2 Innovation Manager, 2019

Objectives

To source and evaluate technologies that deliver the industry needs as identified in the technology roadmap, as well as via ongoing consultation with subscribing members and scanning of emerging opportunities. To achieve this objective, the selected service provider would be required to:

- Identify suitable technologies and technology providers.
- Evaluate the viability of the technology and likely sustainability of the selected service provider company, seeking only to present reputable and viable businesses. Required information would include:
 - the technology readiness level;
 - as assessment of the company viability;
 - an outline of the strategic industry need being addressed and the perceived ability of the technology to meet that strategic need;
 - information on costs, estimated savings and cost/benefit analysis where information is readily available (i.e. via case studies or data);
 - where applicable, information on where the technology has been trialled and installed, the outcomes of these and how translatable these are to the conditions of subscribing members; and
 - comparative market advantages in relation to other similar technologies, e.g. comparative market assessment of technologies as related to a need arising from the technology roadmap, including competitor analysis.
- Facilitate understanding amongst subscribing members of these technologies by presenting information to members in an engaging manner. While the focus of the program would be to engage with key representatives with responsibilities for technology innovation, there may be a need to facilitate an understanding across various levels of

the business (e.g. from operational staff to Managing Director/senior executive). Engagement approaches would need to be tailored to these needs and focus efforts in an appropriate manner.

- Provide central coordination functions for technologies (e.g. the opportunity for subscribing members to refer technologies to the selected provider for review).
- Provide technical expertise and guidance to subscribing members on an as-needs basis, including the identification and evaluation of emerging technologies or areas that will drive utility benefits however may not have been captured in the technology roadmap.
- Understand gaps in the market where our needs are not currently being met.

Indicative approach

1. Central coordination of the identification and evaluation of new and emerging technologies of interest to the water industry. Services could include:
 - Technology evaluation and due diligence services on new and emerging technologies.
 - The development and upkeep of an online database of technologies which houses the information above and is easy to use and search/sort/collate.
2. Facilitation of technology engagement services including:
 - technology presentations and opportunities to interact with technology providers
 - knowledge sharing opportunities between subscribing members, and
 - interaction with other sectors/global users of technologies (including other water utilities) where technologies and trials align with member needs.

Indicative deliverables

- Online database of technologies
- A technology engagement program
- Reports which summarise key outcomes of the technology services, e.g.
 - Summary of key trends from the technology database
 - Comparative market assessments
 - Fact sheets or other easily digestible reports that outline key outcomes or findings from the Activity

Considerations

Note that engagement services will need to be structured to ensure that a maximum number of members will have the opportunity to access the services, while reducing the need for frequent travel. There may also be the need to provide different service offerings for different member Tiers. Our member consultation has shown that larger utilities may agree to a

maximum of 3-4 face to face interactions and 6-9 online meetings per annum, while smaller utilities may be more constrained with travel and capacity. Engagement activities could also be coordinated with WSAA to align with existing forums, for example WSAA holds network meetings or forums on various topics and aimed at various levels of the business.

Any online platform would require easy to use, intuitive graphical interfaces which require only minimal training for members. Ideally, the online platform could seamlessly link to WSAA's community portal (i.e. use of same login details). Submissions that seek to integrate with WSAA will need to allow time for interaction with WSAA's web site developers. If doing so, please provide an preliminary indication of budget for this integration assuming:

1. Access would only involve a link to the online platform site from the WSAA portal, the key aspect would be that the WSAA website would need to verify the person's identity to allow access to the online platform.
2. The WSAA website is coded in Drupal.
3. The online platform could be housed on a separate server.

Activity 3: Technology investigations & trials

"Share the pain, share the gain" - Tier 3 Technology Manager, 2018

Objectives

Progress the knowledge base of technologies to ensure that subscribing members know enough about emerging technologies and their fit with individual needs to decide whether to further evaluate or adopt. This includes:

- Confirming the performance of the technology and that it will meet utility needs.
- Collaborating with other subscribing members to share the costs and risks of any investigations/trials.
- Streamlining the process of adoption of promising technologies by the industry.

Indicative approach

Facilitate technology projects/trials between water utilities where there is a common interest and need in evaluating the nature or effectiveness of the technology prior to full scale purchase of the technology. The focus would be on prioritising and focusing on projects that could be undertaken jointly between subscribing members and where the most overall member value could be delivered.

Note that the identification, scoping and overarching methodology of delivery of potential projects (i.e. Step 1 and 2 below) would be part of the current scope of works. However, any projects that progress under this activity (i.e. Step 3) will be delivered as a separate, stand-alone project and would have a separate project agreement.

1. Project identification

Potential projects are identified and prioritised by the selected service provider; it could be assumed for the purposes of the RFP this may be 3-4 projects per annum.

2. Project scoping

Prepare a draft scope and methodology for the projects in consultation with the key interested parties. It is expected that the scope would identify the following at a minimum:

- The optimal mode of delivery for the project (including key roles and responsibilities such as co-ordination, project management, analysis and reporting) as well as size, scope.
- A proposed methodology, including identification of host utilities to the project and detail on what will be tested, what analysis will be performed, what outcomes will be achieved, success measures and performance expectations.
- Proposed costing for the project.

3. Project delivery

Delivery of the project as per the scope of works as agreed to by members. As mentioned the project will be delivered under a separate contract. Note that WSAA will manage the process to sign on members to the project and any contract management. WSAA reserves the right to put the project out to market in a competitive tender process or deliver in house if that is the preferred approach.

Indicative deliverables

- A work plan for projected work required
- Three to four detailed project scopes per annum

Activity 4: Knowledge retention and transfer

"I want an easy to use, one stop shop for all relevant technology information" - Tier 3 Manager of Innovation & Strategy, 2019.

Objectives

Facilitation of knowledge transfer for technology innovation information, including a range of utility based and external inputs, which would include:

- trial progress, trial Q&A
- review and validation of trials
- outcomes of trials and projects that may inform new strategic directions or member needs.

- case studies
- links to other key websites or key resources for technology (e.g. Water Research Foundation's LIFT program).

Indicative approach

The development and upkeep of a holistic and easy to access "one stop shop" online portal that encompasses the above objectives. This would be integrated with (or directly linked to) deliverables from other Activities. The selected service provider would:

- undertake the entry of all data into the platform;
- ensure the platform is maintained and updated throughout the duration of the contract; and
- liaise with utilities to assist in the input of data.

Indicative deliverables

- Online platform
- Reporting based on key information collected (e.g. summary reports, fact sheets, etc).

Activity 5: Additional opportunity for value add

In addition to the services provided to respond to the needs of Activities 1-4, we invite submissions to consider value-adds that could enhance technology innovation and adoption within the water sector. For example, facilitating greater support of technology innovation across the business.

As per other Activities, if you choose to submit an option for Activity 5, your submission must provide the methodology, team members, time allocation and costings.

3. PROGRAM MANAGEMENT

3.1 Governance structure

The governance structure for the Technology Innovation Program is shown in the Figure below. The successful service provider must nominate a dedicated program manager who will be single point of contact with the WSAA Program Coordinator, Program Steering Committee and subscribing members.

3.1.1 WSAA program coordinator

WSAA will nominate a WSAA program coordinator who will support the program as per the key roles and responsibilities listed in Section 3.5.4.

3.1.2 Program Steering Committee

WSAA will establish a Program Steering Committee (PSC) with six to eight representatives of WSAA member participants. The PSC will have strategic oversight over the program and provide input into the delivery of the program. The PSC will likely comprise of utilities who represent different sizes, regions and functions who can provide holistic feedback.

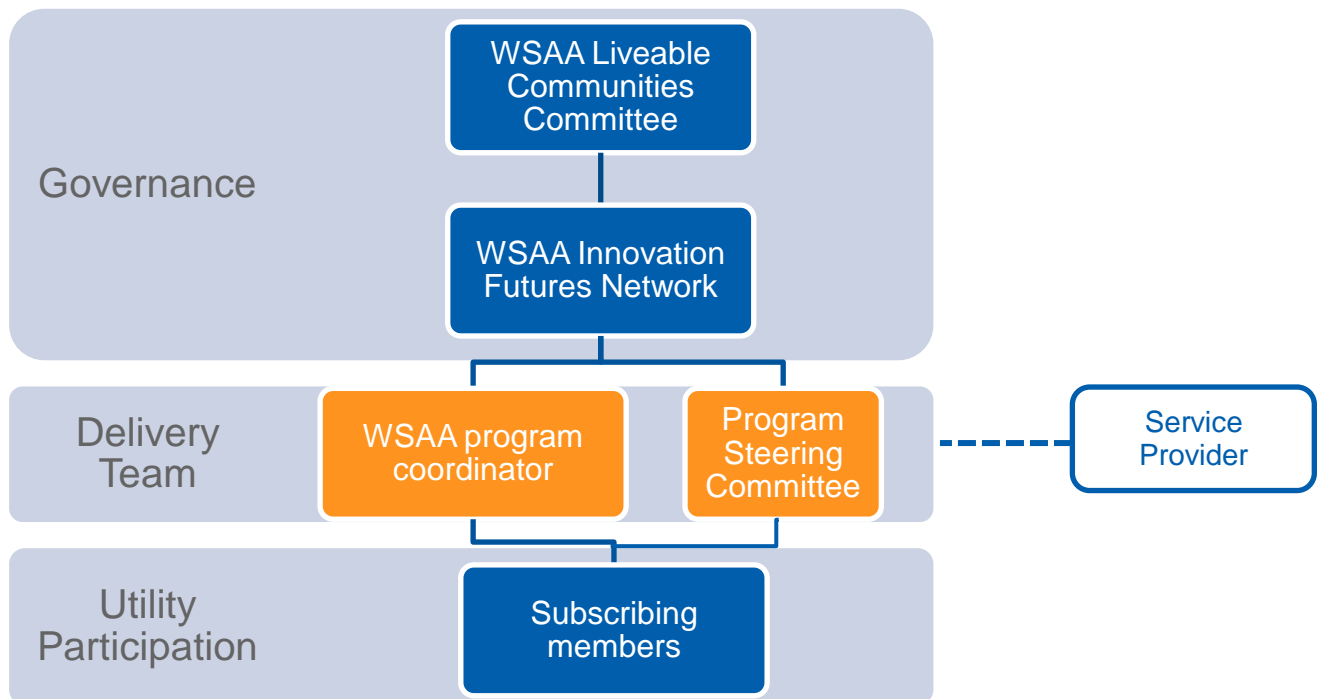
3.1.3 Subscribing members

The selected service provider will also be required to liaise directly with subscribing members to successfully deliver operational aspects of the program. Each subscribing member will nominate a central point of contact to streamline this process.

Note that where applicable, the service provider may also need to liaise with key technical experts or other contacts within utilities. WSAA or subscribing members will provide these contacts.

3.1.4 Governance

The Technology Innovation Program will be governed via WSAA's existing Committee and Network structure as described on the [WSAA website](#). The Network and Committee will provide strategic recommendations to the Program Steering Committee on an as needs basis.



3.2 Meetings

In addition to any meetings/workshops required as part of the program delivery, the following is required from a governance perspective:

- One 2 hour yearly face to face meeting with the PSC and WSAA program coordinator (preferably aligned to other engagement activities)
- Quarterly teleconferences (approximately 1 hour in duration)

The respondent should also nominate any additional meetings required with the PSC and allow for their provision in their program fee.

All meetings with the PSC must be facilitated by the service provider and include an agenda submitted to WSAA one week prior to the session. Minutes and a list of action items resulting from the session must be provided within one week.

Progress review meetings (teleconference as applicable) should be held bi-monthly between the WSAA Program Coordinator and service provider. It is expected that these will last for a maximum of 30 minutes duration, and would cover program schedule, risks and any other issues that may have arisen over the previous month. The discussion would be informed by a monthly status report which is provided by the service provider on a template agreed to by both parties.

A list of action items resulting from the progress review must be provided by the service provider within 3 days of the meeting.

3.3 Invoicing

Invoices will be provided quarterly as a direct relation to the program progress.

3.4 Conditions of Service

The Services shall be provided in accordance with Water Services Association of Australia Services Agreement (Appendix B).

3.5 Monitoring and review

WSAA and the selected consultant will undertake annual review of the program in relation to KPIs that have been agreed upon by both parties. This review will set the key priorities for the upcoming year.

KEY CONSIDERATIONS

In considering a service offering and pricing structure for this RFP, service providers will need to consider the following.

3.5.1 Experience

WSAA is seeking a consultant or consortia of consultants to undertake this program of works. We are looking for service providers who can demonstrate:

- Experience in the facilitation of technology adoption;
- Experience working with and facilitating a diverse member base;
- Access to and experience working with global water technologies and suppliers;
- Experienced senior staff based in Australia who can operate nationally;
- Expertise in technology scanning, due diligence, analysis and review; and
- Strong user design/communications experience to develop an easy to use online platform and engagement strategy

3.5.2 Costings

Note that all private and public water utility members of WSAA will be given the option to participate in this program. For the purposes of costing the program, we ask the submissions to estimate costs where 20, 30 or 40 utilities participate (see Schedule 5 - Fees) and assume a mix of size, geography and function. The final Fee schedule will be negotiated and confirmed as per Stage 2 of the RFP process (see Section 5.5).

3.5.3 Service provider structure

WSAA reserves the right to appoint more than one selected provider to the program or not select any service provider for a particular Activity. No more than one service provider will be selected for each Activity.

We encourage submissions to provide a holistic approach to delivering the program and to partner/develop consortia as required.

3.5.4 Roles and responsibilities

Across the program, the service provider is required to:

- Deliver the program of works as outlined in the proposal as agreed to by both parties and subject to ongoing review and refinement with the Program Steering Committee on the basis of a set of agreed KPIs.
- Liaise with the Program Steering Committee and WSAA program coordinator as needed.

- Provide regular updates, respond to information requests and perform reporting against KPIs as required by WSAA and agreed to by both parties.
- Ensure the quality of all output.
- Provide support/engagement to all subscribing members.

WSAA will provide the following services :

- Contract management between service provider and participating utilities;
- Monitoring and review of the program;
- Assist the service provider in liaising with subscribing members by providing contact details and scheduling meetings or other engagement that align with other member activities; and
- Assistance in the provision of meeting rooms in Melbourne/Sydney where feasible.

3.5.5 Standards for Deliverables

All information provided to the Consultant must remain confidential between the Consultant and the WSAA Program Steering Committee. The Consultant must maintain anonymity of utilities in any presentation, unless agreed otherwise.

3.5.6 Intellectual Property (IP)

WSAA recognises that any service provider will bring existing Intellectual Property to this engagement. It is WSAA's preference that all new intellectual property (excluding improvements to background IP) created in the course of the services will be owned unencumbered by WSAA.

Suitable clauses will be incorporated into the services agreement to ensure that:

- Background IP of all parties is protected, and licensed to the extent required to perform the services and for ongoing use by WSAA and its members.
- Improvements to background IP are retained by the background IP owner.
- New IP is owned by WSAA.

4. SUBMISSION

4.1 Minimum Requirements

Together with a response to the requirements set out in this Request for Proposal, each submission should also include the following information:

- The Proposal Form (Appendix A) duly completed and signed by an officer duly authorised to sign on behalf of the respondent;
- Company details including legal name, trading name, address, ABN and contact details;
- The names of any personnel (including sub-contractors) who would be assigned to the services, and briefly their roles and responsibilities, qualifications, and other professional experience relevant to the conduct of the Services;
- Resource allocation plan showing tasks, personnel, estimated hours and rate;
- Details of all fees associated with each of the four Activities of the program, separately identifying disbursements;
- A detailed program timeline showing the breakdown of each activity required for these services and commensurate with the program fee. The program timeline must include expected delivery dates (meeting program milestones) and should allow necessary periods for the Program Steering Committee to review activity deliverables;
- Methodology and approach to undertaking the program and delivering on the outcomes;
- Experience relative to the program services;
- Declaration of any conflict of interest and how any conflict of interest may be managed;
- Details of Public Liability/Professional Indemnity insurance arrangement;
- Any other relevant information.

4.2 Fee

The respondent shall submit a fee for the services as set out in this submission (Schedule 5).

A breakdown of program activities must be provided that are commensurate with the program fee.

All dollars are assumed to be exclusive of GST where not indicated and in Australian currency.

4.3 Delivery of Submission

Submissions shall be delivered by email to the WSAA Program Coordinator no later than 2 pm (AEST), on Thursday 22nd August 2019. It should be addressed to:

WSAA Technology Innovation Program RFP Coordinator
Gayathri Jasper
Liveability Program Advisor
Suite 8.02 401 Docklands Drive
Docklands Vic 3008

P: (03) 8605 7606

M: 0411 262 494

E: gayathri.jasper@wsaa.asn.au

For the purpose of the respondent's submission, all technical queries and correspondence relating to the proposal must be directed to the WSAA Technology Innovation Program Coordinator.

Late submissions will not be accepted by WSAA, and will be returned to the respondent. However WSAA reserves the right to extend the due date at its discretion and will do so by granting the same extension to the other respondents via email.

5. EVALUATION OF PROPOSALS

5.1 Criteria

The Proposals to this request received by WSAA will be evaluated using a range of relevant business criteria, including those set out below:

- Capability and demonstrated ability to meet outcomes:
 - Demonstrate an understanding of the services required;
 - Provide a robust methodology that meets diverse member needs;
 - Develop and manage best practice solutions;
 - Demonstrate established links with an appropriate stakeholders, including a global reach with technology providers and other key stakeholders;
 - Meet the experience requirements as set out in Section 3.5.1; and
 - Demonstration of professional expertise in executing similar types of assignments.
- Capacity to deliver outcomes:
 - Detail and demonstrate recent relevant experience in providing services of a similar nature;
 - Provide references from organisations for whom the services have been provided, including contact names and telephone numbers;
 - Ability to meet the resource requirements; and
 - Demonstration of good organisational capacity.
- Innovative approach in delivery activities/approaches:
 - Provide an innovative solution that is flexible and meets diverse member needs; and
 - Provide a value add for Activity 5.
- Value for money:
 - Provide a competitive and commercially acceptable proposal.
- Systems/processes:
 - Provision of adequate environmental and quality system;
 - Demonstration of adequate management skills;
 - Demonstration of adequate risk management, including OH&S management and data security;
 - Comply with this proposal document and WSAA Services Agreement; and
 - Comply with the requirements of Section 5.

WSAA reserves the right to seek clarification or further details of any information submitted by a respondent, and to consider any other information which it considers relevant in assessing the proposals received.

5.2 Post Proposal Submissions

WSAA may require a respondent to submit additional information concerning its proposal or to personally discuss its proposal before any proposal is accepted.

Should a respondent fail to:

- Submit the additional information required by the date and time stipulated; or
- Attend personally to discuss its proposal at the scheduled date and time;

its' proposal may not be further considered.

5.3 Rectification of Errors or Omissions

WSAA reserves the right to:

- Check proposals for errors and omissions;
- By agreement with a respondent, amend a proposal price or rate submitted by a respondent to remedy the effect of any errors or omissions in the calculation of the proposal price or rate; and
- By agreement with a respondent, otherwise amend the proposal of the respondent to remedy the effect of any errors or omissions.

5.4 Acceptance of Proposal

WSAA may accept any proposal or part thereof. WSAA is not obliged to:

- Accept the lowest proposal; or
- Accept any proposal.

WSAA will accept a proposal by notifying its acceptance of the proposal in writing. All respondents will be notified in writing of WSAA's decision.

5.5 RFP process

Due to the complexity of this RFP and the desire to keep the process open to new and innovative ideas, it is anticipated that further discussions or negotiations will likely be required to finalise the process and costings. As such, we ask that the submissions provide

as much detail as possible with regards to methodology, team and costings, however acknowledge that final details will be confirmed in a second stage. Respondents may at any stage during the RFP process be required to provide further information. We envisage the following process:

Stage 1

- Submissions for RFP received
- Development of a shortlist of service providers (mid September)

Stage 2

- Request for further information from a shortlist of respondents (late September). This is likely to include:
 - Written clarification on any parts of the submission and/or further detail on process and costings.
 - A face to face presentation and Q&A session in the Melbourne WSAA Offices (late September).

Selection of preferred provider

- Selection of a preferred service provider (early October)
- Any further points for clarification confirmed and final contract signed. At this stage, WSAA will go to the WSAA membership to sign members to the program.

APPENDIX A - PROPOSAL FORM CONDITIONS OF SERVICE AGREEMENT

- Request for Proposal form
- Schedule 1 – Company Information
- Schedule 2 – Persons Nominated as Principal Employees
- Schedule 3 – Nominated Sub-contractors
- Schedule 4 – Key Performance Indicators
- Schedule 5 – Fees

Request for Proposal Form

Request for Proposal

Technology Innovation Program

I acknowledge that I have read this Request for Proposal, understand all associated conditions and have fully acquainted myself with all matters relating to the proposed contract.

Full name of Respondent:

Trading Names:

A.C.N:

A.B.N:

Registered Office Address:

Principal Office in Australia:

Telephone Number:

Mobile Number:

Email:

Contact for this Proposal:

The undersigned hereby offers the Services proposed herein at the prices quoted, and subject to the conditions set forth herein.

Signature of Authoriser:

Printed Name of Signatory:

Position of Authoriser:

Date:

Note: If a consortia is being proposed, this must be completed by each organisation involved in the consortia.

Closing Date and Time of the Request for Proposal 2pm (AEST) Thursday 22nd August 2019.

Schedule 1 - Company Information

Customer References

Please provide a list of three major Australian referees relevant to this Contract in the space below.

Company Name and Address	Contact and Phone Number
1.	
2.	
3.	

Insurance Coverage

The successful Respondent shall have current insurance policies which provides adequate cover against liability under any contract entered into. Please provide the following insurance details in the space below.

	Sum Insured	Period Insured
Public liability		
Professional Indemnity		

Are you willing to increase your insurance amounts to that specified above?

Yes / No / NA

Schedule 2 - Persons nominated as Principal Employees

Name	Role (if applicable)	Hourly Rate (excl GST)

The Respondent shall not substitute any staff nominated in Schedule 2 without the written approval of WSAA.

Schedule 3 - Nominated sub-contractors

Sub-contractor	Service	Hourly Rate (excl GST)

The Respondent shall not substitute any staff nominated in Schedule 3 without the written approval of WSAA.

Schedule 4 - Key Performance Indicators

Key Performance Indicators (in addition to those identified by WSAA) to be proposed by the respondent and to be agreed with WSAA during the negotiation period with the preferred respondent.

No	Key Performance Indicator	Target
1	All services and deliverables provided as per contract	In full and 100% on time
2	Monthly status reports	100% on time
3	Positive member feedback	85% of subscribing members satisfied or highly satisfied with the program
3		
4		
5		
6		

Schedule 5 - Fees

All fees to be GST exclusive.

Fees are to be provided for each service and broken down into as much detail as possible. For the purposes of costing the program, we ask the submissions to estimate costs where 20, 30 or 40 utilities participate (see Schedule 5 - Fees) and assume a mix of size, geography and function as per the three Tier system as described earlier. A mix of 20% Tier 1 members, 35% Tier 2 members and 45% Tier 3 members should be assumed.

It is intended that the full number of participants would be confirmed by December 2019. At this stage, the final cost for the program will be fully agreed.

As a guide, an average fee per utility (smoothing out any Tiers) could be approximately \$10-20k. Note that this is indicative only for the purposes of providing some guidance as to the scope of the program. Utility willingness to pay will depend on the value for money the final program delivers.

	20	30	40
Activity 1			
Task 1 XX			

The service provider is to provide details of any additional fee components in the table below.

Item No	Description of Services	Fee (excl GST)	GST	Fee (incl GST)