|  |  |
| --- | --- |
| **Cluster/ Agency Eng. ID** |  |
| **Grouped Engagement Type** |
| [ ]  1. Government and business strategy | [ ]  3. Marketing and Customer | [ ]  5. Operations |
| [ ]  2. Audit, Quality Assurance and Risk | [ ]  4. Financial Services | [ ]  6. Transaction, Actuarial, Taxation  |
|  |  |  |  |
| **Pricing model** | **Timeframe** |
| [ ]  Fixed price | [ ]  Risk/reward - outcome based | **Start date** | Click or tap to enter a date. |
| [ ]  Time and materials - capped | [ ]  Time and materials - uncapped | **End date** | Click or tap to enter a date. |
| **Secondment** | ☐ Yes | ☐ No | **Duration 1** (working days) |  |
|  |  |  |  |  |
| **Engagement** | **Resource types** | **Daily rate (ex GST)** | **Estimated days**(1 day = 8hrs) | **Total costs**(daily rate x days) |
| Choose an item. | Choose an item. | $ |  | $ |
| Choose an item. | Choose an item. | $ |  | $ |
| Choose an item. | Choose an item. | $ |  | $ |
| Choose an item. | Choose an item. | $ |  | $ |
| Choose an item. | Choose an item. | $ |  | $ |
| Choose an item. | Choose an item. | $ |  | $ |
| Choose an item. | Choose an item. | $ | (add rows as needed) | $ |
|  |  | **Total days 2:** | **Total costs:** $ |
| **Discount Structure (%)** |  | **Additional Discount (%)** (if applicable) |  |
| **Maximum expenses estimated\*\*** | $ | **Total Discount $(ex GST)** | $ |
| \*\*Expenses are capped at 7% of engagement fees. | **Total engagement cost - after discount** |  |
| **Estimated Engagement Cost after discount and expenses (ex GST)** | $0.00 |

|  |
| --- |
| Suppliers to complete and attach this checklist when submitting proposals for high level SCF groupings engagement types 1-6 from the P&MS Scheme to confirm that the standard commercial framework requirements have been met. **Internal (client) sign-off** |
| **Name** |   | **Role** |   |
| **Signature** |   | **Date** |   |

|  |
| --- |
| P&MS Scheme (SCM0005) - Engagement Types Overview |
| The Standard Commercial Framework applies to Engagement Types 1 to 12 that are mapped to 6 high level groupings.  |
| Grouped Engagement Types | P&MS Scheme Eng. No. | Engagement Type | Sub-engagement Types |
| **Government & Business Strategy** | 1 | Government & Business Strategy | **1a.** Strategy development and planning, **1b.** Strategic business case, **1c.** Business performance reviews, **1d.** Organisational design / transformation, **1e.** Business intelligence, **1f.** Cost management,**1g.** Governance, **1h.** Policy review / development |
| **Financial Services** | 5 | Financial Services | **5a.** Accounting services, **5b.** Accounting standards,**5c.**  Finance process reviews, **5d.** Asset management, **5e.** Valuations, **5f.** Financial / economic advisory services,**5g.** Forensic advisory |
| **Audit, Quality Assurance and Risk** | 6 | Audit, Quality Assurance and Risk | **6a.** Internal / external audit, **6b.** Risk management, **6c.** Probity services |
| **Marketing and Customer** | 10 | Marketing and Customer | **10a.** Market research, **10b.** Customer / customer experience, pricing |

|  |  |  |  |
| --- | --- | --- | --- |
| Grouped Engagement Types | P&MS Scheme Eng. No. | Engagement Type | Sub-engagement Types |
| Operations | 2 | Business Processes | 2a. Business process mapping / re-engineering, |
| 3 | Project Management | 3a. Project management, |
| 4 | Change Management | 4a. Change management, |
| 8 | Human Resources | 8a. Human capital management, |
| 8b. Culture, |
| 8c. Work health and safety (WHS), |
| 8d. Remuneration, |
| 8e. Retention, |
| 8f. Diversity, |
| 9 | Procurement & Supply Chain | 9a. Procurement / sourcing, |
| 9b. Category management, |
| 9c. Procurement accreditation, |
| 9d. Supply chain |
| Transaction, Actuarial, Taxation | 7 | Taxation | 7a. Goods and services tax (GST), |
| 7b. Other tax services, |
| 11 | Actuarial Services | 11a. Actuarial services, |
| 12 | Transaction Services | 12a. Transaction services |

|  |
| --- |
| Resource type and definitions guide |
| The following resource types to be used to obtain quotes from Suppliers.  |
| Resource type | Description | Minimum years of relevant experience guide |
| Partner | Senior management member | 12 |
| Director | Management member with deep expertise | 10 |
| Senior Manager | Senior employee with significant specialist expertise and team leadership capabilities | 8 |
| Manager | Junior level of entity management, specialist technical and subject matter expertise; manages assignment schedules and resource allocation | 6 |
| Senior Consultant | Field leadership role, moderate level of technical and subject matter expertise; provides business system advice and consulting services | 4 |
| Consultant | Performs detailed data and systems analysis, identifies risks, gathers additional data, interprets data and provides recommendations for improvement.  Higher level technical skills, broader experience base, business process & industry knowledge and requiring less supervision than an analyst | 2 |
| Analyst | Performs data gathering and analysis with strong technical skills. Low level of industry knowledge.  Supervised by more senior members. | 0 - 4 |
|  |  |  |
| Types of Engagement |
| Terms | Definition |
| Assignment | Assignment is a form of Engagement with specific Deliverables, and management of the Engagement is the responsibility of the supplier.  |
| Secondment | Secondment is a form of Engagement where the Supplier’s personnel work under the Agency’s supervision and direction to provide Services and/or Deliverables.  |
| Variation | Variation means any change to an Engagement, including any addition, increase, decrease, omission, removal to or from the scope, timeframe, fees or requirements for an Engagement.  |
|  |   |  |
| Pricing Models |
| Pricing Model | The method used to determine the price for products and services. (e.g. Fixed Price,  Time and Material - Capped, Time and Material - Uncapped, Outcome based Risk & Reward)  |
| Fixed Price | The cost for an engagement is agreed as fixed price by both parties before the engagement starts based on a defined scope and deliverables, and is not affected by the actual amount of resources utilised. However, supplier must submit the breakdown of the Fixed Price by Resource Types and Daily rates in compliance with Standard Commercial Framework. Any Variations in scope or deliverables after contract award may generate changes to the fixed price. |
| Time and Materials- Capped | The cost for an engagement depends on the actual amount of resources required to achieve the desired outcomes and is variable. Commercials are agreed before the engagement starts at a Daily Rate level for each Resource Type (cost per day of a resource x the number of days). The supplier invoices the client for the full amount of resources utilised during a particular period up to or equal to the agreed capped amount and cannot be exceeded. Engagement cost is capped as agreed between the parties in the contract. |
| Time and Materials- Uncapped | The total cost for an engagement depends on the actual amount of resources required to achieve the desired outcomes and is variable. Commercials are agreed before the engagement starts at a Daily Rate level for each Resource Type (cost per day of a resource x the number of days). The supplier invoices the client for the full amount of resources utilised during a particular period. The engagement cost is not capped. |
| Risk and Reward - Outcome based | The cost for an engagement depends on the supplier’s ability to meet defined outcomes rather than for the actual resourcing requirements and expenses. The supplier is financially rewarded for exceeding expectations but risks penalty or non-payment if outcomes are not delivered. Outcomes based Risk/ Reward is often difficult to monitor and measure and may lead to disputes between parties. |
| Daily | A day is defined as 8 hours of work. |