DATA ITEM DESCRIPTION

1. DID NUMBER: DID-SSM-S&Q-V5.2
2. TITLE: Quote for Survey and Quote Services
3. DESCRIPTION and intended use

The ‘Quote for Survey and Quote Services’ at Annex A is required to define the request, work proposal, required resources and the price and payments proposed for undertaking work that is not included within the existing work scope of the Contract, but may be conducted in accordance with the Survey and Quote (S&Q) provisions of the Contract.

The Commonwealth uses Part 1 of the ‘Quote for Survey and Quote Services’ to scope a request for S&Q Services. The Commonwealth Representative may ask the Contractor to define elements of this request. For an Approved S&Q Quote, the Commonwealth Representative uses Part 3 of this DID to finalise the S&Q Order.

The Contractor uses Part 2 of the ‘Quote for Survey and Quote Services’ to define the scope of work activities, Support Resources and the price and payments that are proposed for meeting the requirements of the Commonwealth’s request.

1. INTER-RELATIONSHIPS

Each S&Q Order inter-relates with the following data items, where these data items are required under the Contract:

Support Services Management Plan (SSMP), and all other plans governing the provision of Services that detail the management of S&Q Services; and

Engineering Change Proposal (ECP).

1. APPLICABLE DOCUMENTS

The following documents form part of this DID to the extent specified herein:

|  |  |
| --- | --- |
| 1. Nil |  |

1. Preparation Instructions
   1. Generic Format and Content

The data item shall comply with the general format, content and preparation instructions contained in the CDRL clause entitled ‘General Requirements for Data Items’ (when specified in the Contract).

* 1. Specific Content
     1. Specific Requirements

All quotes for S&Q Services shall be documented in accordance with the requirements of:

Annex A to this DID;

the clauses of the COC for ‘Survey & Quote Services’ and ‘Technical Data, Software and Contract Material’;

Attachment B, S&Q Services annex; and

the SOW clause ‘Quoting for Survey and Quote Services’.

Annex A: QUOTE FOR SURVEY AND QUOTE SERVICES

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| 1. \\d85userdata.dpe.protected.mil.au\ch\christian.laursen\My Documents\ASDEFCON Templates\Defence-Stacked-Black.jpg  A.B.N. 68 706 814 312 | Request for Quotation  for S&Q Services | | | 1. Quotation No: | |  |
| 1. File Reference | |  |
| 1. Contract No: | |  |
| 1. Quotation due: | | |
| 1. Time: |  | |
| 1. Date: | 1. DDMMMYY | |
| 1. Contact details: | | | | | | |
| 1. Contractor Contact Officer: 2. [...CONTACT OFFICER NAME...] 3. [...ADDRESS DETAILS...] | |  | 1. Commonwealth Contact Officer: 2. [...CONTACT OFFICER NAME...] 3. [...ADDRESS DETAILS...] | | | |
| 1. Phone: [...PHONE NUMBER...] | |  | 1. Phone: [...PHONE NUMBER...] or [...ALT PH. NUMBER...] | | | |
| 1. E-mail: [...E-MAIL ADDRESS...] | |  | 1. E-mail: [...E-MAIL ADDRESS...] | | | |

|  |  |  |  |
| --- | --- | --- | --- |
| 1. Contractor Representative, company name and address 2. [...CONTRACTOR'S NAME...] 3. [...ADDRESS DETAILS...] | |  | 1. Commonwealth Representative or Authorised Officer: 2. [...NAME, POSITION...] 3. [...ADDRESS DETAILS...] |
| 1. ACN: | 1. ABN: |  |

Return quotations to the Commonwealth Representative, or to an alternative location, if identified below:

|  |
| --- |
| 1. By post to: 2. [...INSERT ALTERNATIVE DELIVERY ADDRESS...] |

Security Classification:

|  |
| --- |
| 1. [...INSERT SECURITY CLASSIFICATION...] |

PART 1 (S&Q Request): To be completed by the Commonwealth Representative, unless otherwise specified as to be completed by the Contractor.

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| SECTION 1 – S&Q SERVICE REQUEST | | | | | | | | | | | | | | | | | | |
| Title: | | 1. [...INSERT TITLE (AND TASK NUMBER IF APPLICABLE)...] | | | | | | | | | | | | | | 1. Revision No.: | | |
| Description of the Service to be provided: | | 1. Service description: 2. [...INSERT DESCRIPTION OF SERVICES OR REFER TO ATTACHED PAGES...] 3. Performance measurement and/or Acceptance criteria: 4. [...INSERT DETAILS OF HOW THE SERVICES ARE PROPOSED TO BE MEASURED AND/OR THE CRITERIA FOR THE ACCEPTANCE OF DELIVERABLES (EG, REFER SECTION 2, OR AS DEFINED IN TEST PLAN, ETC)...] 5. Additional references, specifications or standards specific to the required Services (if applicable): 6. [...INSERT SPECIFICATIONS, STANDARDS OR OTHER REFERENCES (NOT SERVICE MANAGEMENT PLANS)...] | | | | | | | | | | | | | | | | |
| Nature / category of Service  (eg, engineering investigation, Major Change, damage repair, item provisioning): | | | | | Product(s) / platform / site to which the Service relates: | | | Earliest  start date: | | Service completion date: | Commonwealth GFM (yes / no): | | Commonwealth GFF (yes / no): | | | | Contract SOW / DSD clause reference: | |
|  | | | | |  | | | 1. DDMMMYY | | 1. DDMMMYY |  | |  | | | |  | |
| SECTION 2 – REQUIRED DELIVERABLES | | | | | | | | | | | | | | | | | | |
| Line No. | Part No. / NATO Stock No. (if applicable) | | Description | | | Type of Item  (eg, Stock Item, Technical Data, Reports, Software) | | | Qty | Deliverable Acceptance / Approval criteria | | Delivery Date | | Delivery Location | | | | |
|  | 1. XXXX-XX-XXX-XXXX | |  | | |  | | | 1. qty |  | | 1. DDMMMYY | |  | | | | |
| SECTION 3 – PRICE BASIS | | | | | | | | | | | | | | | | | | |
| Firm Price Basis: | | | | 1. payable upon: Milestones  and/or Acceptance of Services / Deliverables | | | | | | 1. For an S&Q Service with a combined firm and Not-To-Exceed price basis, the following categories / elements of the S&Q Service shall be firm priced: 2. [... INSERT DETAILS OF FIRM PRICED ELEMENTS ...] | | | | | | | | |
| Not-To-Exceed Price Basis: | | | | 1. (cost plus / reimbursement / price of the labour, materials, Subcontract, and Other Direct Costs, as per Contract Attachment B, up to an Approved amount) | | | | | |
| Combination of above: | | | |  | | | | | |
| SECTION 4 – COMMONWEALTH REPRESENTATIVE’S AUTHORISATION | | | | | | | | | | | | | | | | | | |
| 1. Signed for and on behalf of the Commonwealth of Australia: | | | |  | | |  |  | | | | | | |  |  | |  |
| 1. (signature) | | |  | 1. (print name and position) | | | | | | |  | 1. (date) | |  |

PART 2 (S&Q Quote): To be completed by the Contractor, unless otherwise specified as to be completed by the Commonwealth.

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| SECTION 5 – APPROACH AND RESOURCES | | | | | | | | | | | | | |
| Work plan | 1. [... Contractor to address the requirements for an S&Q work plan (including any work plan requirements specified in the SOW). Attach a separate work plan if necessary ...] | | | | | | | | | | | | |
| Adverse Impact | 1. [...Contractor to address adverse impacts with respect to other Services or performance (including any specified requirements in the SOW for addressing adverse impacts)...] | | | | | | | | | | | | |
| Australian Industry Capability | | 1. The proposed S&Q Service meets the conditions requiring the AIC program to be addressed and an AIC summary has been attached: yes  / no | | | | | | | | | | | |
| GFM | Item description  (eg, additional GFE, GFD or GFI) | | Qty | | Delivery Date and Location | Return Date and Location | | Remarks/ Intended Purpose | | TO BE COMPLETED BY THE COMMONWEALTH | | | |
| Time Period for Inspection | | Technical Data or Software restriction[[1]](#footnote-1) | |
|  | | 1. qty | | 1. DDMMMYY / | 1. DDMMMYY / | |  | | 1. DDMMMYY to DDMMMYY | |  | |
|  | |  | |  |  | |  | |  | |  | |
| GFF | Facilities  (in addition to any existing GFF) | | Remarks/ Intended Purpose | | | | | Period of Access | | TO BE COMPLETED BY THE COMMONWEALTH | | | |
| Comments / Conditions of Access | | | |
| 1. [...INSERT FACILITY DETAILS...] | |  | | | | | 1. DDMMMYY to DDMMMYY | |  | | | |
| GFS | GFS  (in addition to any existing GFS) | | | | | | | Dates for provision of GFS | | TO BE COMPLETED BY THE COMMONWEALTH | | | |
| Comments / Conditions of Access | | | |
| 1. [...INSERT GFS DETAILS...] | | | | | | | 1. DDMMMYY to DDMMMYY | |  | | | |
| Subcontractors | Name | ABN/  ACN | | Work, Services to be provided and/or Items to be supplied | | | Details for Approved Subcontractors only | | | | PT PCP Subcontract or Reporting Entity Subcontract  (identify which) | | Comments |
| Location of work (include post code) | | Australian Industry Activity (if applicable) | Technical Data or Software restriction[[2]](#footnote-2) |
| 1. [...INSERT NAME...] | 1. XX XXXXXXXXX | | 1. [...INSERT SERVICE / ITEMS...] | | |  | |  |  |  | |  |
|  |  | |  | | |  | |  |  |  | |  |

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| SECTION 6 – QUOTATION PRICE | | | | | | | | | | | | | | | | |
| Labour | Task | | | Contract Attachment B details (ex-GST) | | | | | | Hours required (Normal Time) | | | Hours required (Other Time) | | Item subtotal (ex-GST) |  |
| Line Item No. | Category of Labour or Skill Level | | Hourly Rate (Normal Time) | Hourly Rate (Other Time) | |
|  | | |  |  | |  |  | |  | | |  | |  |  |
|  | | |  |  | |  |  | |  | | |  | |  |  |
| Total Labour (ex-GST) | | | | | | | | | | | | | | | 1. $ |
| Materials | Line No. | Part No. / NATO Stock No. (if applicable) | Description | | | Type of Item (eg, Stock Item, Software, Technical Data) | | | Unit Price  (ex-GST) | | Qty | | | Markup (%) [[3]](#footnote-3) | Item subtotal (ex-GST) |  |
|  | 1. XXXX-XX-XXX-XXXX |  | | |  | | |  | | 1. qty | | |  |  |  |
|  |  |  | | |  | | |  | |  | | |  |  |  |
| Total Materials costs (ex-GST) | | | | | | | | | | | | | | | 1. $ |
| Subcontracts | Subcontractor name | | | | | | | | | | | | | Markup (%) ‡ | Subcontract value (ex-GST) |  |
| 1. [...INSERT NAME...] | | | | | | | | | | | | |  |  |  |
|  | | | | | | | | | | | | |  |  |  |
| Total Subcontract costs (ex-GST) | | | | | | | | | | | | | | | 1. $ |
| Other Direct Costs[[4]](#footnote-4) | Description | | | | | | | | Unit Price (ex-GST) | | | 1. **Qty** | | Markup (%) ‡ | Amount  (ex-GST) |  |
| 1. [...INSERT DESCRIPTION OF OTHER COSTS TO BE INCLUDED / REIMBURSED...] | | | | | | | |  | | | 1. qty | |  |  |  |
|  | | | | | | | |  | | |  | |  |  |  |
| Total of Other Direct Costs (ex-GST) | | | | | | | | | | | | | | | 1. $ |
| TOTAL NTE PRICE / QUOTATION (exclusive of GST) | | | | | | | | | | | | | | | | 1. $ |
| GST | | | | | | | | | | | | | | | | 1. $ |
| TOTAL NTE PRICE / QUOTATION (inclusive of GST) | | | | | | | | | | | | | | | | 1. $ |

|  |  |
| --- | --- |
| SECTION 7 – PAYMENT ARRANGEMENTS | |
| Milestone payments | 1. [...CONTRACTOR TO PROPOSE...] |
| Payments upon Acceptance of Services / Deliverables | 1. [...CONTRACTOR TO PROPOSE...] |
| Other (only applicable to Not-To-Exceed price elements) | 1. [...CONTRACTOR TO PROPOSE...] |

|  |
| --- |
| SECTION 8 – ADDITIONAL TECHNICAL DATA AND SOFTWARE RIGHTS AND RESTRICTIONS |
| 1. **To be completed by the Commonwealth:** 2. Do the S&Q Services require GFM that is subject to restrictions of Technical Data and Software rights not detailed in the current Contract?  no /  yes, refer to attachment [...INSERT REFERENCE...].   If ‘yes’, the Commonwealth is to include a ‘special conditions’ attachment with equivalent information to the GFM Attachment or ‘Licensing and Approval Schedule’ Attachment, as applicable. |
| 1. **To be completed by the Contractor:** 2. Do the S&Q Services require additional Technical Data and Software and associated rights that are not detailed in the current Contract?  no /  yes, refer to attachment [...INSERT REFERENCE...]. Will the deliverables have restrictions on the Commonwealth’s rights to Use and Sublicense, as detailed in clause 5 of the COC?  no /  yes, refer to attachment [...INSERT REFERENCE...].   If ‘yes’ to either question, the Contractor is to include a ‘special conditions’ attachment with equivalent information to the Technical Data and Software Rights Schedule in the Contract. |

|  |
| --- |
| SECTION 9 – CONFIDENTIAL INFORMATION |
| 1. Does this quotation include an attachment for Confidential Information (ie, in addition to information referred to in the Confidential Information and Reporting Attachment to the Contract)?  no /  yes   If ‘yes’, the Contractor Representative, or authorised delegate, should include a ‘special conditions’ attachment to list the information considered as new Confidential Information, meeting the criteria specified in the attachment to the Contract for Confidential Information and Reporting. The attachment to the S&Q Quote should be prepared in the form of the Confidential Information and Reporting attachment to the Contract. |

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| SECTION 10 – CONTRACTOR’S AUTHORISATION | | | | | | |
| 1. Signed for and on behalf of the Contractor: |  |  |  |  |  |  |
| 1. (signature) |  | 1. (print name and position) |  | 1. (date) |  |

PART 3 (S&Q Order): To be completed by the Commonwealth Representative after Approval of the S&Q Quote in accordance with the COC.

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| 1. \\d85userdata.dpe.protected.mil.au\ch\christian.laursen\My Documents\ASDEFCON Templates\Defence-Stacked-Black.jpg 2. ABN 68 706 814 312 | | Survey and Quote Order | | | 1. S&Q Order No: | |  |
| 1. S&Q Order Date: | | 1. DDMMMYY |
| 1. Pages: | |  |
| 1. Amendment No: | |  |
| 1. Contractor’s details (Company name and address): | | | | 1. Contract No: | |  | |
| 1. Approved Quotation No. | |  | |
| 1. S&Q Services Title: | |  | |
| 1. S&Q Services Summary Description: | |  | |
| 1. ACN | 1. ABN | | | 1. Approved Quotation Date: | | 1. DDMMMYY | |
| NTE PRICE / QUOTATION (AS SET OUT IN THE APPROVED QUOTATION) | | | | | | | |
| Description | | | | | | | Price / Quotation  (excluding GST) |
| 1. Total Labour | | | | | | |  |
| 1. Total Materials | | | | | | |  |
| 1. Total Subcontract Costs | | | | | | |  |
| 1. Total Other Direct Costs | | | | | | |  |
|  | | | 1. TOTAL NTE PRICE / QUOTATION (GST exclusive): | | | | 1. **$** |
|  | | | 1. GST: | | | | 1. **$** |
|  | | | TOTAL NTE PRICE / QUOTATION (GST inclusive): | | | | 1. **$** |
| PRICE AND PAYMENT BASIS | | | | | | | |
| 1. [...Insert details of the basis on which the Contractor will paid for the S&Q Service – ie reimbursement of Other Direct Costs up to the Approved S&Q Quote, Milestones or payment upon Acceptance....] | | | | | | | |

|  |  |  |  |
| --- | --- | --- | --- |
| 1. This S&Q Order is issued on the terms set out in the conditions of contract, the Approved Quotation referred to above and any Special Conditions attached by the Commonwealth. 2. This S&Q Order comprises the following documents:    1. this S&Q Order;    2. Attachment 1 – Approved Quotation;    3. Attachment 2 – [...INSERT DETAILS...]; and    4. Attachment 3 – [...INSERT DETAILS...]. | | | |
| 1. Inquiries regarding this order should be directed to the Contact Officer: | | | |
| 1. Printed name: | 1. Phone no. | 1. email: | 1. Special Conditions Attached: 2. Yes 3. No |
| 1. Address | | |
| 1. Signed on behalf of the Commonwealth of Australia  |  |  |  |  |  | | --- | --- | --- | --- | --- | |  |  |  |  | 1. DDMMMYY | | 1. (signature) |  | 1. (print name and position) |  | 1. (date) | | | | |

Note: When applicable, include attachments for sections 8, 9 and Australian Industry Capability.

Attachment: Australian Industry Capability Summary

1. Unless otherwise agreed by the Commonwealth (in writing) this attachment is required to be included in an S&Q Quote and an S&Q Order when:
   1. the expected value of the S&Q Services exceeds $4 million inclusive of GST; and/or
   2. the S&Q Services will have material significance to an Australian Industry Activity (AIA) that has been identified in the Contract.

Table 1: Australian Industry Capability Schedule for the S&Q Services

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| Item Number | AIC Activity Description / scope | Company Name and ACN/ABN/NZBN | ACE Value (AUD) | Location (including  Postcode) | SME  (Y/N) | Local Business  (Y/N) | Veterans (Y/N) |
| (a) | (b) | (c) | (d) | (e) | (f) | (g) | (h) |
| 1. 01 |  |  |  |  |  |  |  |
| 1. 02 |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |
|  |  | 1. TOTAL: |  |  |  |  |  |

1. When preparing the AIC Schedule (above), the Contractor is to summarise the various activities within the Services to be performed by Australian Industry. Insert additional lines / sub-lines for each activity and entity (Contractor or Subcontractor) performing an activity. Table details:
   1. Item number, to uniquely identify each line.
   2. AIC Activity Description, as a description of the scope of the Service / activity performed by an Australian Industry, with separate lines for the Contractor and each Subcontractor (each entity).
   3. The Australian or New Zealander company / entity undertaking the activity, including the ACN, ABN, or NZBN, as applicable.
   4. Australian Contract Expenditure (ACE) value of the activity, determined in accordance with the ACE Measurement Rules. The ACE value is to be the GST exclusive and duty free dollar value (to the nearest $1000).
   5. The location (including the postcode) where the applicable entity will perform the majority of the work activity.
   6. Identify whether the entity is a Small to Medium Enterprise.
   7. Identify whether the entity is a local business (as should be defined in the Glossary).
   8. Veterans: Has the organisation signed the Veterans Employment Commitment (yes/no)? (refer: [veteransemployment.gov.au](https://www.veteransemployment.gov.au/))

Table 2: Australian Contract Expenditure for the S&Q Service

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Cost Category | AIC Activity Description and Scope | Line Item Price | ACE% | ACE Value ($) |
| 1. Contractor – labour cost |  |  |  |  |
| 1. Contractor – materials cost |  |  |  |  |
| 1. Contractor – Other Direct Costs |  |  |  |  |
| 1. Contractor – mark-up, G&A and Profit |  |  |  |  |
| 1. Subcontracts – labour |  |  |  |  |
| 1. Subcontracts – materials |  |  |  |  |
| 1. Subcontracts – Other Direct Costs |  |  |  |  |
|  | 1. **Total Price:** | 1. $ [Insert total] | 1. **Total ACE:** | 1. $ [Insert total] |

1. When preparing the ACE summary for the S&Q Services (above), the amounts (ie, rates) and ACE% are to be consistent with the S&Q Services Annex to Attachment B to the Contract. Additional lines are to be added to separate between Subcontractors and different activities within the S&Q Service. The Total ACE must be consistent with the Total ACE value in Table 1.

The calculated ACE% percentage for this S&Q Service: […INSERT…] %

1. Where:
2. and:
   1. all prices are exclusive of GST;
   2. labour costs are traceable to section 6 (excludes labour provided through listed Subcontracts);
   3. materials costs are traceable to section 6 (excludes materials provided through listed Subcontracts);
   4. Subcontract prices are categorised by their primary purpose (labour, materials or other), with individual lines for each Subcontractor;
   5. Other Direct Costs are defined in accordance with the CASG Cost Principles, and may include travel, freight, equipment and venue hire, etc;
   6. AIC activity description and scope includes, as applicable, the reason for travel, the Subcontractor’s name, if a deeming rate from the ACE Measurement Rules have been used, etc;
   7. line item price / cost is stated in $A, converted from source currency if applicable;
   8. ACE% is the percentage of the line item price / cost that is determined to be ACE in accordance with the ACE Measurement Rules; and
   9. ACE Value ($) = line item price \* ACE%.

1. Insert ‘no’ or if restrictions apply to the use of Technical Data and Software provided as GFM, then cross-refer to an attachment for ‘special conditions’. See also section 8. [↑](#footnote-ref-1)
2. Insert ‘no’ or if Technical Data or Software is to be sourced from an Approved Subcontractor and restrictions would apply to Commonwealth rights, then cross-refer to an attachment for ‘special conditions’. See also section 8. [↑](#footnote-ref-2)
3. Contractor’s markup(s) shall accord with Contract Attachment B, for the relevant order value. [↑](#footnote-ref-3)
4. Refer to CASG Cost Principles. Examples of Other Direct Costs include: travel, freight, equipment and venue hire. Indirect costs (eg, corporate overheads) are to be included in markup. [↑](#footnote-ref-4)