From:	Cover, Leanne
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Subject:	draft CEO message [SEC=UNCLASSIFIED]
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Attachments:	image001.jpg

Strategic Compass update

As part of our ongoing commitment to the Strategic Compass, we'll be running an ongoing series of presentations over the next 12 months or so, and I invite all CIT staff to attend as many of the sessions as possible. The series is being developed to help us all work towards honouring the Compass's four promises:

* to raise CIT's ambitions to meet new expectations
* to adapt CIT's offerings to provide skills for the future
* to contribute to the new economy and position for prosperity
* to invest in CIT's business for viability and value

As you're all no doubt aware, we've been guided by the Strategic Compass for nearly three years now, supported by the nine projects (some of which continue to operate and some of which have come to their natural conclusion). As we shift into the second half of the year and look further towards the future, it's likely we'll be releasing the second evolution of the Strategic Compass in early 2021, and underpinning it will be the same (or similar) promises. That's why we're developing the learning series—to help you understand the thinking that underlies the promises, and to help you play your vital role in ensuring we meet them.

This series will feel different to what you may expect from staff training over the years, and that's because it will be different; for starters, it won't be training. It will be an opportunity to gain a variety of perspectives about the broader context and systems in which CIT, Canberra and the wold of work is located and connected to. We won't be training you how to do X or Y in this series. Training in X or Y is of course still very important to the continued growth and development of our CIT workforce, but it is only a means to an end, with that end being the meeting of the Strategic Compass four promises. And while new initiatives and processes and technologies will be rolled out across CIT over coming years, and you will receive the training you need, you won't find it in this learning series. What I hope you will find, however, are complimentary ways of looking at and understanding CIT (including its staff, its students, its processes and its technologies) and the place that it is positioned within the broader Canberra ecosystem.

Approximately each month (diary invites will be sent to all staff in coming days) , an hour/90 minute long session will be held with our complexity guide Patrick Hollingworth where you'll be presented with information to enable you to build upon your complimentary ways of looking at and understanding CIT and the broader Canberra ecosystem. The sessions will essentially be presentations with support material to both stimulate and challenge you support the hard work needed from us all in the meeting of the four promises.

There is no one single bullet that will suddenly allow CIT to be a transformed organisation ready to meet the immeasurable challenges of the third decade of the 21st Century. That approach has been tried many times in the past, and in my experience rarely works. Rather, there are many,

many things that we are doing to ensure that CIT continues to remain relevant and to meet the four promises of the Strategic Compass as we head into the year 2020.

Please keep a look out for further details on these sessions.

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Canberra Institute of Technology

Evolving Together

CIT Futures

February 2019

Strategic Compass: the story so far...

As the largest registered training organisation in the ACT, our excitement continues to grow at what we see to be an unprecedented opportunity for CIT to play a major – and highly-visible – role in shaping Canberra as the knowledge capital of Australia.

In a world and age where knowledge is now increasingly available to everyone, possession of knowledge alone is no-longer enough. Rather, the ability to apply an appropriate knowledge to an appropriate context in an appropriate way is the far-more nuanced skill-set that is required. This is what CIT aims to deliver in its transformation – not only to its students, but also the broader Canberra and federal ecosystem to which it belongs.

As the world becomes increasingly connected and complex, traditional institutions that are able to adapt and coevolve with the changing times, and to apply knowledge in this much-more nuanced way, will be able to remain relevant and sustainable in the long-term, if they are prepared to do the necessary work. And it is this idea, the notion that CIT has immense future possibilities, that truly excites us about doing the work.

The four pillars

The *Strategic Compass 2020 – Evolving Together* has provided the necessary strategic guidance to enabled us to act with confidence on this unprecedented opportunity. Its four pillars of **Vision** (*Shaping Change*), **Learning** (*Growing our Region's Economy*), **Workforce** (*Advancing Canberra's Workforce*) and **Business** (*Transforming our Business*) are identified as the following **four promises:**

- to raise CIT's ambitions to meet new expectations;
- to adapt CIT's offerings to provide skills for the future;
- to contribute to the new economy and position for prosperity; and
- to invest in CIT's business for viability and value.

We stay true to these promises in the face of the inevitable short-term pressures, frictions and demands that will arise, knowing that in CIT's transformation we are playing a long-game. And again, it is the long-game – the notion that CIT has immense possibilities, and that it will remain relevant and sustainable in the long-term – that is truly exciting for CIT and the ACT community.

Before we proceed, we think it's important to show you how we've interpreted, and been guided by, the four pillars/promises so far. We think that this will help you understand why we're going about CIT's transformation in the way that we are. Please bear with us as we briefly expand on our interpretation:

Vision (*Shaping Change*): **how?** – By raising our ambitions to meet new expectations

We all know that the world is changing rapidly, arguably at a rate that is without precedent, as are the cities of the world, including Canberra. We view CIT an important agent within the ecosystem that is Canberra; therefore, as Canberra's ecosystem changes, CIT will inevitably adapt to and coevolve with the ecosystem.

As occurs naturally within any ecosystem, adaptation and coevolution will happen regardless of predetermined intervention, but the expectations of the Canberra community and the ambitions of the ACT government, the CIT board and CIT leadership group, directed by the Strategic Compass, provide an opportunity for the adaptation and coevolution of CIT to occur in a manner which is one of the two following ways:

(1) unsustainably – in which CIT is stripped of its diversity via traditional organisational transformation measures such as cost and staff reduction, which although in the short-term might provide the illusion of success, will in the long-term result in an absence of evolutionary fitness to adapt and coevolve with the Canberra ecosystem. We believe that a lack of fitness will ultimately lead to the irrelevance of CIT as an agent within the Canberra ecosystem.

(2) sustainably – in which via a combination of traditional and contemporary approaches (which we expand upon later in this paper) CIT maintains it natural diversity (which given the broad suite of skills its staff teach, is much higher than many commercial enterprises that focus only on one or two areas of expertise), and uses this natural diversity to continue to adapt and coevolve with the changing Canberra ecosystem. In the short-term this may not appear to be as successful (via traditional metrics such as cost reduction), but in the long-term means continuity of evolutionary fitness and relevance to the Canberra ecosystem.

Learning *(Growing Our Region's Economy)*:
how? – By adapting our offerings to provide skills for the future

As per Vision, this is about responding to the changing needs of the consumer, industries and the broader community, noting that they are all agents comprising the Canberra ecosystem. As the ecosystem continues to evolve, we believe CIT's focus on learning needs to shift from the teaching of information and skills (i.e. the simple and rote *what?* and *how?*) as things which are best-suited to static and repeatable contexts, to the teaching of information and skills and their applications (i.e. the complex and deeper *why?, what?, how?* and *what if?*) as things which are best-suited to dynamic and new contexts.

Simple and rote *what?* and *how?* thinking does not enable evolutionary fitness (instead, it just maintains things as they are); complex and deeper *why?, what?, how?* and *what if?* thinking does. This shift will require CIT teaching staff to change (to varying degrees), which in turn means the CIT administrative and management staff will need to change (to varying degrees). Importantly, we believe that deliberately designing changes to the system that is CIT can help people within the CIT system evolve.

Workforce *(Advancing Canberra's Workforce)*:
how? – By contributing to the new economy and positioning for prosperity

As per Vision and Learning, this is about responding to the changing needs of the consumer, industries and the broader Canberra ecosystem (noting that it is these changing needs which create the new economy). We believe this is about shifting both what teachers teach and students learn, and how teachers teach and students learn, which enables the adaptation and coevolution of CIT within the Canberra ecosystem, for the betterment of not just CIT but also the broader Canberra ecosystem (i.e. prosperity). This in-turn leads to the increased evolutionary fitness of not only CIT, but also the broader Canberra ecosystem.

Business *(Transforming Our Business)*:
how? – By investing in our business for viability and value

Whereas the pillars of Vision, Learning and Workforce are primarily about responding to the changing needs of the consumer, industries and the broader Canberra ecosystem (i.e. they are externally focussed), we have interpreted this pillar as more specifically about how CIT might enable itself to respond (i.e. it is internally focussed), via adaptation and coevolution. We think the how relates to the manner described previously under the pillar of Vision (i.e. via both the traditional and contemporary approaches).

We believe the key word in this pillar is investing. Through a lens of the contemporary approach, we view investing as an act of introducing additional energy into a system, with an expectation of emergent, valuable and novel changes via feedback loops (i.e. what would be traditionally referred to as returns on the investment). Again, using a lens of the contemporary approach, this investment needs to be feedback loops of the positive nature, because feedback loops of the negative nature leads to stasis and equilibrium, and that is not what the Strategic Compass is about. We believe positive feedback loops in the form of investment on an ongoing basis is required to maintain diversity and evolutionary fitness to enable adaptation and coevolution

Perhaps most importantly, we note that this investment cannot only be an investment into technology. Technology often improves efficiency, however an unintended consequence of that is the removal of system diversity, which in turn reduces evolutionary fitness. And so we believe that the investment needs to not only be in technology but also in people, both individually and collectively. Our mantra is this: **we shift the evolutionary potential of the CIT system so its people can adapt and coevolve, and then watch the evolutionary fitness of the CIT system improve rapidly**. We see the Evolving Together project as the positive feedback loop which supports the other eight projects and connects our staff to the intent of the Strategic Compass.

The true value of the nine projects…

Although we have appreciated the role the Strategic Compass's nine projects have played in beginning the transformation of CIT, our work over the past two years has allowed us to appreciate that the true value of the projects lies not in their isolation—that is, not as nine discrete, unrelated projects, which when added together amount to CIT's transformation—but rather in their connectivity. In understanding how the nine projects can complement each other, and are all connected to each other, to the Strategic Compass's intent, and to the greater Canberra ecosystem to which CIT belongs, we are able to see CIT future possibilities.

It's all about connection…

In fact, we see CIT's ongoing relevance and sustainability in the long-term as a result of the connections between things. Just as a smart phone not connected to the internet is a somewhat useful tool (it has many services and apps which continue to function without connectivity, but its true value is only realised once it is connected), so too is CIT. Like a smartphone, CIT's true value to the Canberra ecosystem is only fully-enabled once it is connected, both internally within CIT and externally across Canberra.

The application of a complimentary, newer approach…

And so it is that in addition to the application of traditional organisational transformation approaches, including undertaking leadership development, skills training and digitalisation initiatives, we have also begun investigating and applying what we refer to as 'contemporary' approaches to organisational transformation. These contemporary approaches are informed by recent advances in science and technology that are complementary to the traditional realm of organisational management and transformation. Most importantly, these sciences are based on systems of connectivity and complexity, and in our eyes, an understanding of such sciences can be complementary to the existing body of knowledge on organisational management and transformation.

The traditional approach

We contend that the traditional approach to organisational management and transformation views organisations as predictable and mechanistic sum-of-their-parts systems that can be managed, controlled and transformed to reach aspirational and idealised end-states via a combination of fixed and governing constraints, with these constraints being administered by traditional means of good and best practice and individual agency i.e. policy, procedure and leadership.

This traditional approach views organisations and the people who comprise them as being linear and causal in nature; that is, they follow cause and effect logic, where one process (the cause) is connected to another process (the effect), where the first is responsible for the second, and the second dependent on the first. This approach views both the environment in which organisations operate and the organisations themselves as being linear, where inputs and outputs are proportional, additive and hence predictable. This also leads to a traditional linear, process of identification-of-problem followed by identification-of-solution.

However, in an increasingly connected and complex world, everything becomes contingent upon everything else, meaning that the linear problem/solution process often leads to more problems, which require more solutions, which inevitably create more problems.

Mounting evidence from a variety of respected sources suggests the traditional approach to organisational management and transformation, whilst being suitable for organisations operating and seeking to change in relatively stable environments, can paradoxically limit organisations operating and seeking to change in unstable and unpredictable environments.

Although there are a myriad of reasons for this, we see the following two factors as being key:

- the traditional approach can lead to an *over-accumulation* of fixed and governing constraints. These constraints – although implemented with the best of intentions – can reduce an organisation's ability to adapt to and coevolve with changing environments.
- the traditional approach can constrain – rather than enable – the development of employees (and employees with restricted development have a reduced ability to adapt to and coevolve with changing environments). As stated previously, CIT has a high level of diversity, and we are fervent believers that this diversity can be used to enable CIT's relevance and sustainability in the long-term.

The contemporary approach

The contemporary approach to organisational management and transformation sciences are based on systems of connectivity and complexity, and views organisations as being increasingly complex in nature, and recognises the importance of allowing for enabling constraints, where emergent practice becomes possible.

Whereas the traditional approach views organisations as entities which are the sum of their parts – and hence views organisational management and transformation as a predictable, mechanistic process – the contemporary approach understands some elements of organisation (such as people and culture, innovation ecosystems etc) to also be complex adaptive systems, where the relationships between an organisation's constituent parts exhibit non-linear dynamics, and thus views organisations as entities which are greater than the sum of their parts. This means the contemporary approach does not view organisational management and transformation as only a predictable, mechanistic process, but also as somewhat unpredictable, organic and dynamic ones.

Dispositions, tendencies and propensities

This contemporary approach sees organisations and the people who comprise them as being dispositional – rather than causal – in nature. In other words, we could say we see organisations and their people as having tendencies, or propensities, if you will. This means we entertain the notion of multiple, possible emergent futures, all of which are contingent upon the current propensities of CIT and its people. Thus, the contemporary approach we are designing focusses less upon ultimate goals and end points and more upon current dispositions, tendencies and propensities.

To do this, we view both the environment in which organisations operate and organisations themselves as being non-linear, where inputs and outputs are not proportional – but are instead multiplicative – and hence less predictable. This means we view the evolutionary fitness of the organisation and its people as being the determinant of the disposition.

Thus, the evolutionary fitness of the organisation and its people is the *key* state that must be understood to determine the organisation's disposition, which in turn determines the likelihood of the organisation evolving in one direction or another. Working with the evolutionary fitness and the disposition of the organisation as it currently is (i.e. in the here-and-now) then becomes the ground zero for transformation efforts, as opposed to the traditional approach, where the focus is on the idealised end-state, and where subsequent action attempts to fill the gap between the current state and the idealised end-state.

We should again emphasise our reference to organisations as being dispositional, rather than causal, speaks to the notion that due to the increased unpredictability in the world today, the efficacy of cause and effect logic – remembering that this is where one process is connected to another process, where the first is responsible for the second, and the second dependent on the first – will be limited, and even potentially damaging (i.e. the dilemma of the linear problem/solution process in non-linear environments).

By viewing an organisation as dispositional rather than as causal, the contemporary approach avoids the trap of cause and effect logic and aspirational and idealised end-states which the traditional approach often falls into, and instead focuses on the here and now, on the current disposition of the organisation. In other words, the contemporary approach works with the realities and the tendencies and the capabilities of the organisation in its present state, and seeks to increase the evolutionary fitness of the present state to increase its ability to adapt to and evolve with changing environments.

Building knowledge to enable action

Although much global discussion today about organisational management and transformation is starting to recognise the potential benefits of this contemporary approach we see little evidence that this discussion is anything but superficial. We hear much discussion that uses the language of the contemporary approach, words such as complexity, connectivity and networks, there is very little evidence to suggest an underlying (and entirely necessary) understanding of these sciences exists.

Much of the work done over the past two years as part of the Evolving Together project has been about developing the necessary underlying understanding, and with that now in place, we are in a much better position to amplify our activities. The work we have completed has been about building this understanding for those people tasked with meeting the four promises made within the Strategic Compass.

Although all staff have had exposure to elements of Evolving Together, the main focus to date has been with the CEO, the Executive team, and senior management staff, all of who are the traditional focus points of change initiatives within organisations. As we progress through 2019 and into 2020, we anticipate that we will *significantly* expand our lens and work not only within all levels of CIT staff, but also its students and the broader Canberra ecosystem. Our collaboration with CBRIN to date is but one example of this.

An overarching scaffold for this new approach

Before we describe two specific tools and one example associated with the contemporary approach that we are using, it is important to briefly share the overarching scaffolding we have designed to support the next 24 months of Evolving Together, because this approach is less linear and more modular than one might expect.

Less linear, more modular

By "less linear" we are referring to the previously addressed dilemma of the linear problem/solution process, and by "more modular" we are acknowledging the non-linear and less-predictable nature of the ecosystem in which we are operating – meaning that the modules are designed to be used in multiple, different, and highly-contingent contexts. The highly-contingent contexts about which we speak are also scalar, meaning that the modules can be deployed across different geographical, social and temporal scales.

The four modules are as follows:

Acquire knowledge: We continue to understand the theory behind the process of the contemporary transformation approach, as the knowledge and theories themselves continue to evolve. Not only is acquisition of this knowledge (and knowledge about the application of this knowledge) crucial to gain before action is undertaken, it's also crucial to continue to gain as we proceed to act.

See the systems and the data, and the connections between them: We continue the work undertaken to enable CIT staff to intuitively 'see' its agents (i.e. its constituent parts, such as people, knowledge, infrastructure etc) and the systems created by its agents, the interplay between its agents and systems, and the systems' enablers and constraints. We will use system visualisation tools to literally see the agents and the systems. Examples of these visualisation tools include, but are not limited too, network mapping software and micro/at-source narrative capture software.

Hypothesise, test and experiment: We continue to familiarise ourselves with this visibility and to explore the system and data landscapes. We 'make sense' of the systems and the data and the connections between them, mostly via small-scale probes and safe-to-fail experiments. We have a preference for conducting smaller, shorter-length experiments that, if deemed successful and consistent with the four promises of the Strategic Compass, can be 'scaled-up' and across the ecosystem, as opposed to conducting larger, lengthier experiments that, if not successful nor consistent with the four promises of the Strategic Compass, could do permanent damage to the ecosystem. Thus, we believe our contemporary approach minimises downside risk but maximises upside risk. Importantly, the portfolio/s of safe-to-fail experiments are designed to test a suite of hypotheses garnered from the new visibility and exploration of the system topologies and data landscapes.

Design and scaffold constraints: Scaffolding supports the contemporary approach to transformation because it is temporary, flexible and can be easily and quickly constructed and then dismantled, which is an adaptable response to a world that has rapidly become increasingly connected and complex. We use scaffolding, which is a flexible, impermanent structure designed to support new growth and development across multiple different contexts, as opposed to solid structure, which becomes permanent and inflexible.

Two tools and one example of this new approach

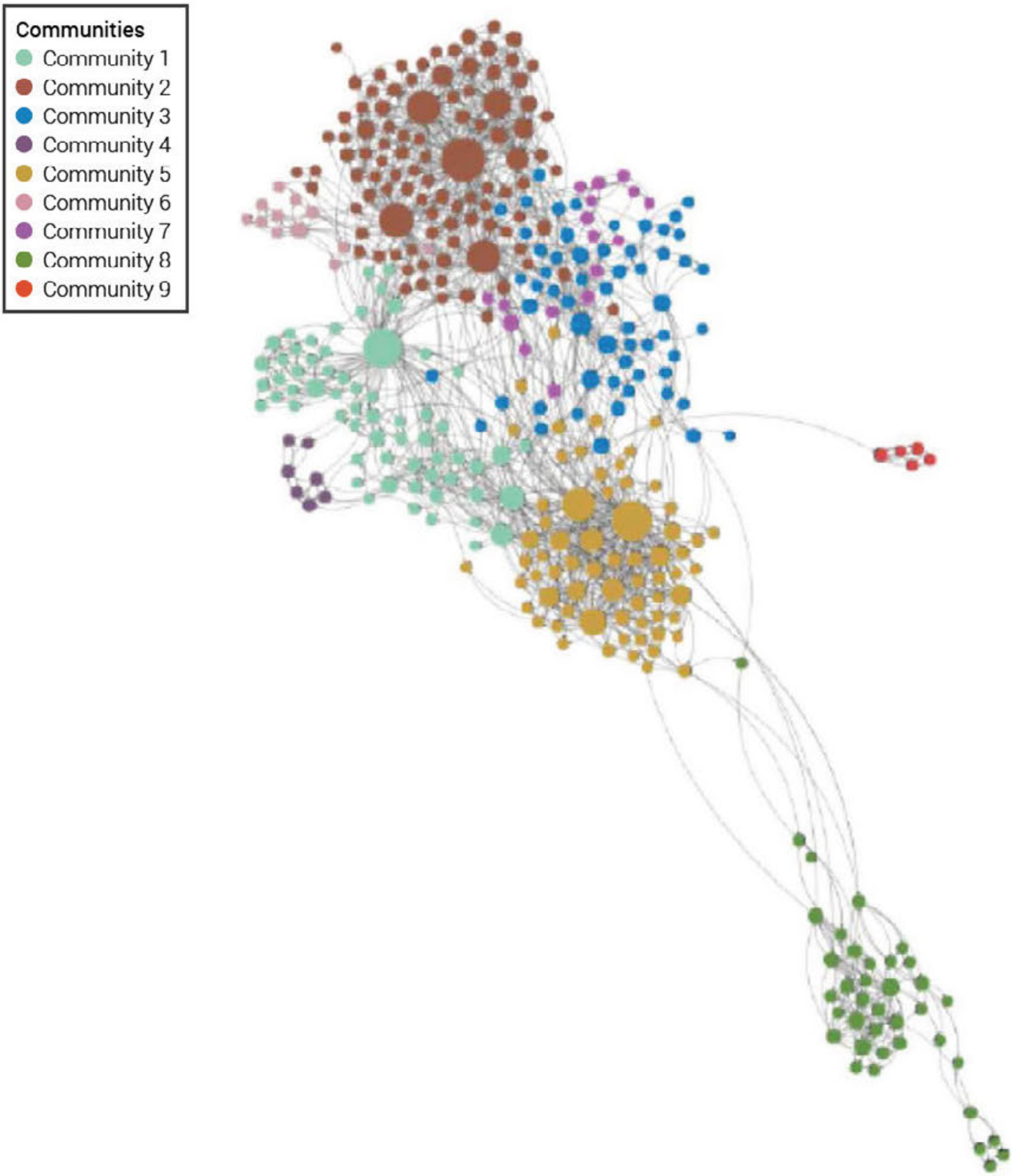
Below we briefly describe for you two tools we are *just* starting to use, and one example of what this overarching approach has delivered.

Tool 1: Network mapping

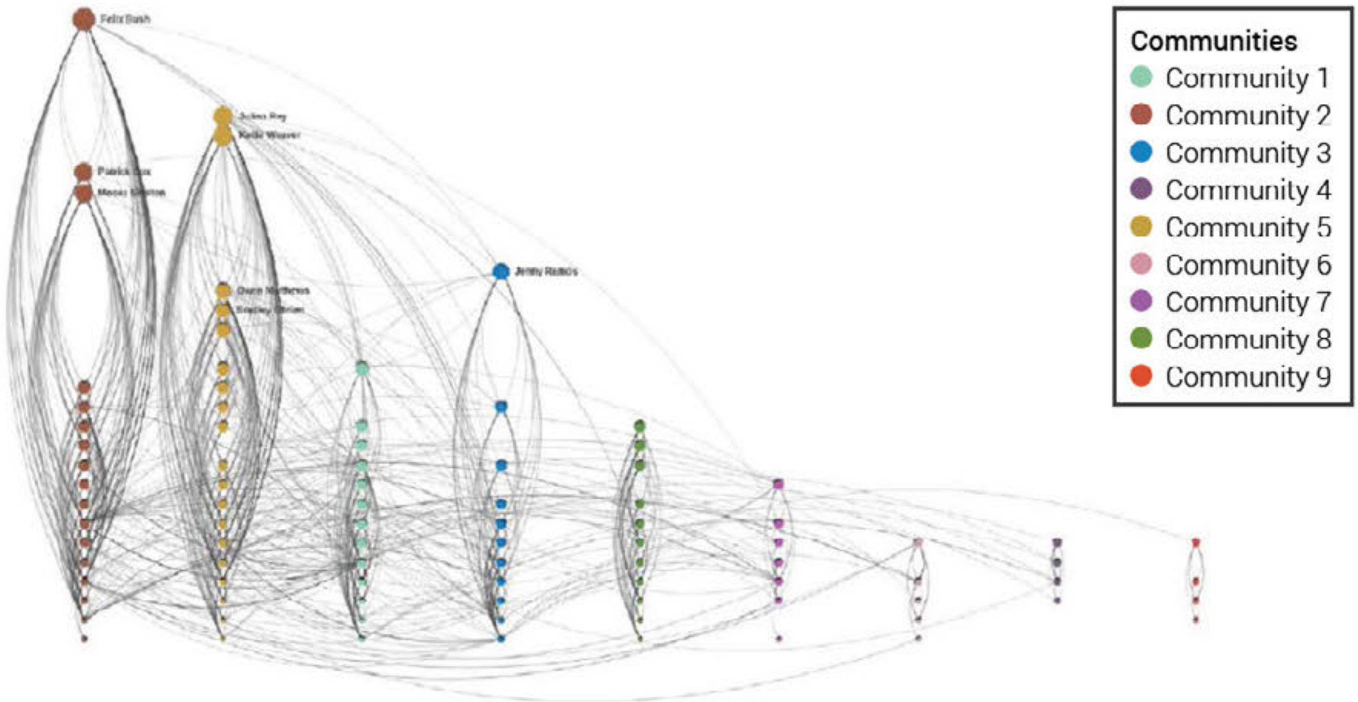
Network maps (or graphs, as they are technically known to mathematicians) are visual representations of the landscapes of networks (or network topologies, as they are technically known to mathematicians). Networks themselves are collections, or assemblages, of things that are related to varying degrees, with these things being both material and virtual. A network can be comprised of mobile phones using the same 4G network, through to a network of people working for the same organisation or who move in the same social 'circles'. Networks can be physical, as in the road network of Australia, and networks can be virtual, such as the network of connections you will have if you maintain a LinkedIn account.

Until recently, an understanding of networks and the technology to visualise them was mostly the domain of technical and academic professions, such as mathematicians, biologists, sociologists and computer scientists. However, with the advent of cloud-based technologies, combined with an increased understanding of the pervasive impacts networks have on everyone's daily life, network mapping is starting to become more accessible to a wider domain of prospective users. We belong to this new cohort, and in 2019 we'll be starting to use network mapping as a means to gain better visibility across the CIT landscape.

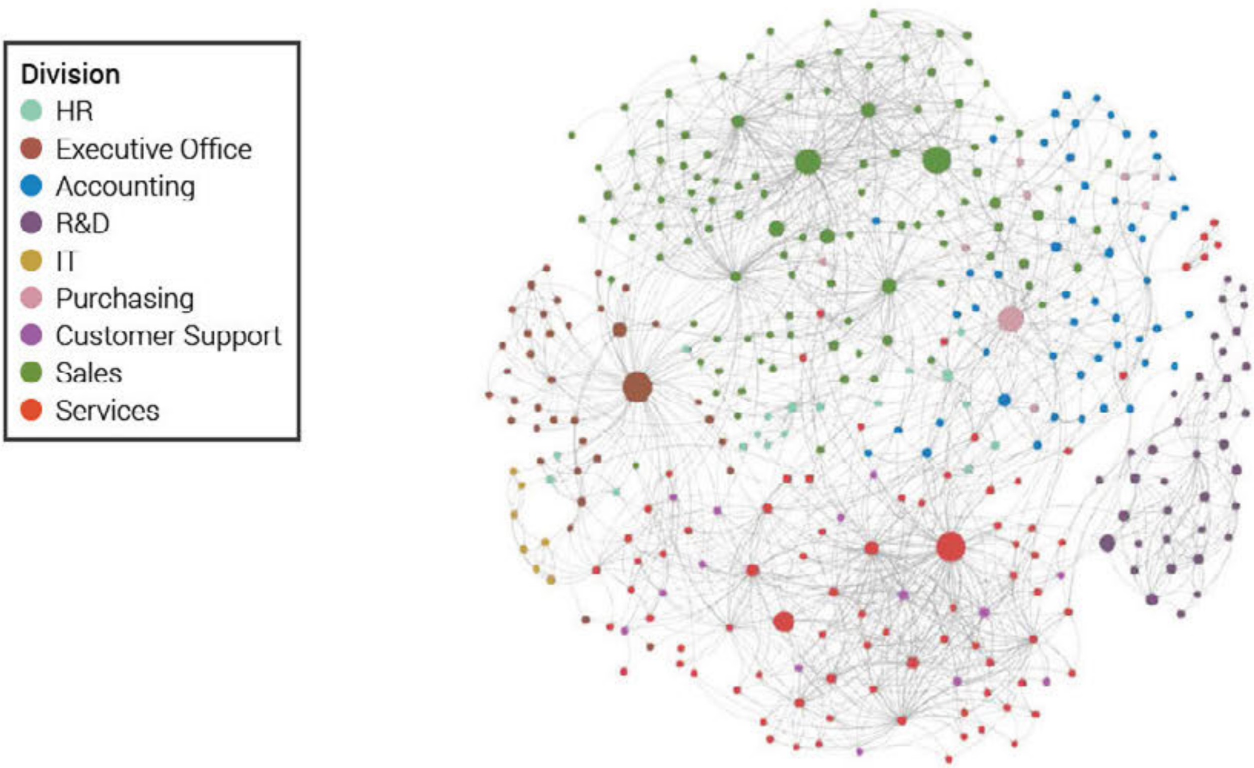
Below is an example of the visibility that network mapping can provide. Although it's not based on CIT data (it's actually from an Enron email dataset which was made publicly available following the Federal Energy Regulatory Commission's investigation into the Enron scandal), it provides a good dataset to show how we can map relationships, communication, and the sharing of ideas across an organisation. Importantly, by tweaking certain parameters and algorithms in the mapping tool we can create a multitude of different visualisations. In the following visualisations, nodes (dots) are Enron employees, the edges (links) between the nodes show email communication, and colours represent different communities within Enron.



Application of an algorithm that detects communities – groups of relatively closely connected nodes – with different communities being coloured differently. The size of the nodes shows the total number of connections that they have. The larger the node, the more connected they are. This provides a measure of network centrality, or in layman terms, the amount of influence these nodes exert across the network.



Here the communities have been separated out horizontally. Employees in each community are graphed vertically, according to their number of connections, with least connections at the bottom and most connections at the top.



Here the key connectors within the network are represented by their increased node-size. The measure used here is 'betweenness' or 'brokerage'. Betweenness measures the extent to which key connectors broker/bridge connections between groups that otherwise may not be connected. Note how some nodes are only connected within their departments (internally), whereas the key connectors also exhibit significant connections to nodes within other departments (externally).

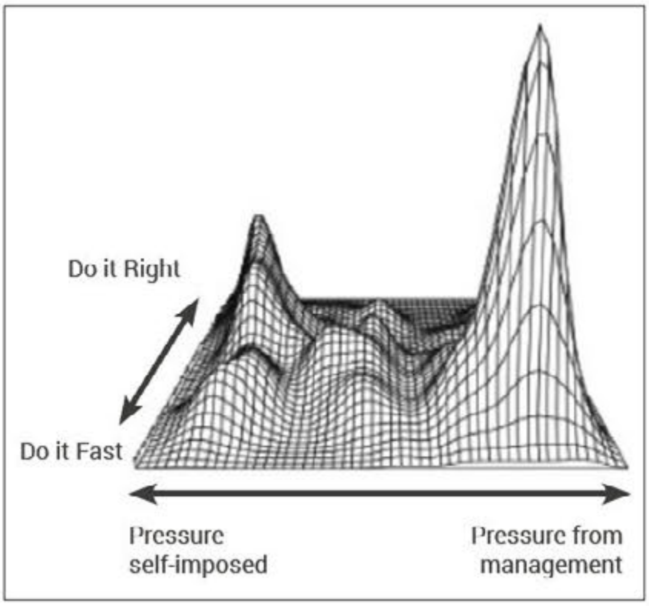
We are excited to be deploying this tool in 2019 and 2020 and onwards, and expect that it will become part of a broader suite of tools that some CIT staff are trained and competent to use on an ongoing basis.

Tool 2: Micro-narrative capture

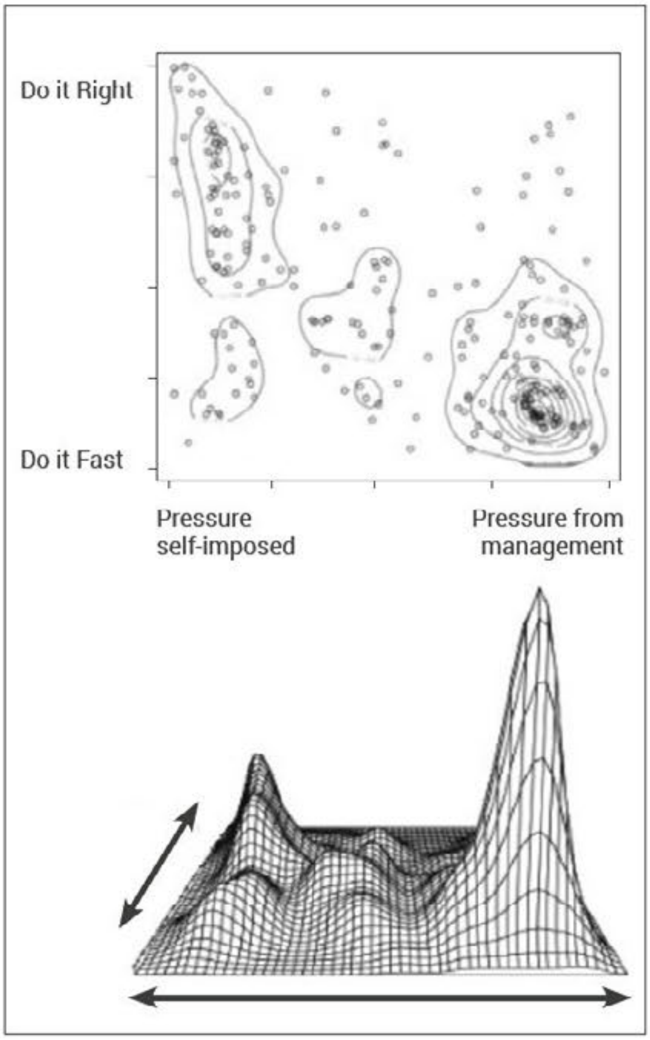
Micro-narrative capture is an emerging tool which enables the capture, interpretation and visualisation of 'street-level' narratives in organisations. As opposed to meta-narratives, which are the stories that support an overarching and most-often centralised vision or strategic direction (with the Strategic Compass being a good example of a meta-narrative), micro-narratives are the decentralised and distributed day-to-day stories told by across the organisation (they are also referred to as 'water cooler stories'). We sometimes refer to meta-narratives as 'Capital S Stories', as they are highly abstract, coarse in granularity and designed and constructed, and micro-narratives as 'small s stories', as they are highly concrete, fine in granularity and naturally emergent. In addition to the popular opinion that organisational culture is a top-down construct, it is also true that micro-narratives form the building blocks from which culture emerges.

As per the history of networks, an understanding of micro-narrative and the technology to visualise them was mostly the domain of technical and academic professions, such as anthropologists and sociologists. Again, with the advent of cloud based technologies, combined with an increased understanding of the importance of street-level narratives, micro narrative capture is starting to become accessible to a wider domain of prospective users. We belong to this new cohort, and in 2019 we'll be starting to use micro-narrative capture as a means to gain better visibility across the CIT landscape.

Below is an example of the visibility that micro-narrative capture can provide. Although it's not based on CIT data (it's from an undisclosed source), it provides a good dataset to show how we can map the stories (and what those stories actually mean) across an organisation. Once the stories are mapped, we can then start to hypothesise and experiment on the landscape to shift the clusters/peaks in preferred vector directions (consistent with the Strategic Compass).



Here we can see a three dimensional landscape which shows where micro narratives are clustered in terms of their meaning, revealing the 'street-level' discourse.



Here we can see the two dimensional landscape which led to the three dimensional rendering above.

Example: 2019 CIT Evolving Together all staff day

The 2019 CIT Evolving Together all staff day, is an example of the outcomes we are achieving and can expect this new approach to deliver.

Whereas the all staff day in 2017 was a highly-structured formal affair, with a tight, meticulously planned schedule of presenters and ordered, linear seating arrangements (and with the 2018 event being something of a transitional event, with less formality than in 2017, but still a well-planned schedule and organised audience seating), this year's event was markedly different. Although it was still planned and structured (for example, there was a set starting time, presentations times, and lunch time), we employed many of the principles of complexity and connectivity to design an event that would allow for individual and collective dispositions to enable emergence and unexpected but positive none-the-less outcomes. In other words, instead of designing an event, we designed a context within which emergent outcomes resulting from diverse dispositions were realised.

For example, we didn't need to 'sign in' or tell people where to sit. However, by taking advantage of the beautiful, natural setting of the Reid Campus courtyard, we set up tables and chairs in ways which would entice people to use them and socialise with each other, and in doing so, share their own micro-narratives. We also didn't tell people which concurrent sessions they had to attend – they could go wherever they wanted (and there was a diverse selection from which to choose). We were convinced that this somewhat less traditional approach would result in 'more natural' opportunities for connectivity and idea-sharing than in a more formal, structured, conference setting. And the informal and formal feedback that we have received so far confirms that we were right in our conviction.

CIT Evolving Together all staff day

In conclusion: from projection, to probabilities to possibilities.

The way we see it, although the Strategic Compass identifies the strategic direction for CIT to the year 2020, it also enables and guides us to work towards longer timeframes. As we've said previously, the world is becoming more connected and complex at a faster and faster rate, and we believe that the traditional institutions which are able to adapt and coevolve with the changing times, and to apply knowledge in this much-more nuanced ways, will be able to remain relevant and sustainable in the long-term.

To this extent, we have experienced a subtle shift in how we perceive the future towards which we are transforming CIT to be ready for.

We now begin to orientate ourselves away from projecting from the past and predicting and planning for a single, known future. Our knowledge about connectivity and complexity informs us that to take such a narrow view would be too limiting, and indeed, too risky. What happens if that single, known future does not happen? It renders our plans at the best obsolete and at the worst misguided. (And one has to only think briefly to recognise the countless examples from the past few years where certain, known futures have not eventuated).

And so we have experienced a gradual ontological shift, which we describe as follows:

- from **projection**, where we plan forwards (based on the past) and prepare CIT for a single, present and seemingly inevitable future;
- to **probabilities**, where we take a risk-based approach (based on probabilities), and prepare CIT for a discrete number of potential futures, all of which have mathematical probabilities of occurring;
- to **possibilities**, where we design contexts (based on desired possibilities which allow for and enable the opportunity for adaptive, coevolutionary and emergent outcomes) and prepare CIT to influence possible emergent futures.

And it is this idea – the notion that CIT has immense future possibilities that truly excites us.

Canberra Institute of Technology

– CIT BOARD IN CONFIDENCE –

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Cc: Cover, Leanne; [redacted]
Subject: Evolving Together - CIT Futures
Date: Wednesday, 12 June 2019 8:58:54 AM
Attachments: image001.jpg
Evolving Together - CIT Futures.pdf

Colleagues

Thank you for attending yesterday's session.

Please find attached a copy of the CIT Board paper *Evolving Together CIT Futures* that Patrick and I referenced yesterday.

Once you've had a chance to read/ re-read it I'd be happy to convene some follow up discussions with you (and or your teams) should you wish to discuss further.

Regards
Leanne

Lequita Young on behalf of Leanne Cover
Executive Assistant to the Chief Executive

Canberra Institute of Technology
Tel: 02 6207 3103 | **Mobile:** 0419 44 50 58 | **Email:** lequita.young@cit.edu.au
Address: CIT Reid, Room E108, 37 Constitution Avenue, Reid, Canberra | GPO 826, Canberra 2601
CRICOS No. 00001K

From:	Cover, Leanne
To:	Cover, Leanne
Subject:	Evolving Together Services Agreement Reference Guide (002).docx [SEC=UNCLASSIFIED]
Date:	Friday, 26 July 2019 10:25:22 AM
Attachments:	Evolving Together Services Agreement Reference Guide (002).docx

From:	Young, Lequita on behalf of Cover, Leanne
To:	Cover, Leanne
Subject:	FW: Tentative dates from Patrick re CIT [SEC=UNCLASSIFIED]
Date:	Friday, 10 May 2019 11:41:53 AM
Attachments:	image001.jpg image002.jpg

From: Patrick Hollingworth [mailto:[redacted]]
Sent: Monday, 6 May 2019 1:24 PM
To: Cover, Leanne <Leanne.Cover@cit.edu.au>
Cc: Young, Lequita <Lequita.Young@cit.edu.au>
Subject: Re: Tentative dates from Patrick re CIT [SEC=UNCLASSIFIED]

Thanks Leanne. The dates below that I have **bolded** I will place in my calendar with a few ***bolded/ital*** questions.

I'm cc'ing in Lequita.

www.patrickhollingworth.com

Subscribe to Patrick's fortnightly (ish) missive
Check out Patrick's book The Light and Fast Organisation

> On 3 May 2019, at 6:23 PM, Cover, Leanne <Leanne.Cover@cit.edu.au> wrote:
>
> Thanks Patrick
> Some immediate feedback on CIT availability - hope this helps?
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> - **29 & 30 May yes**
> - **4 & 5 June yes**
> - **20 & 21 June yes**
> - **9 & 10 July yes**
> - 8 yes & 9 yes August ***can we do 7 & 8 August?***
> - **20 & 21 August yes**
> - ***can we do 3 & 4 and 25 and 26 September?***
>
> Leanne
>
> Sent from my iPhone
>
> --
>
>

person.

In the spirit of reconciliation, we acknowledge that we are on Ngunnawal land.

Please consider the environment before printing this email.

From: Cover, Leanne
To: Cover, Leanne
Subject: Fwd: CIT Exec Planning Session
Date: Tuesday, 11 June 2019 9:35:19 PM
Attachments: Team Workshop Outline and Agenda.docx
ATT00001.htm
ACU Campus Map.pdf
ATT00002.htm

Sent from my iPad

Begin forwarded message:

> **From:** "Cover, Leanne" <Leanne.Cover@cit.edu.au>
> **Date:** 4 June 2019 at 12:20:23 pm AEST
> **To:** "Ryan, Paul" <Paul.Ryan@cit.edu.au>, "McKenry, Paula" <Paula.McKenry@cit.edu.au>, "Whale, Andrew" <Andrew.Whale@cit.edu.au>
> **Subject: CIT Exec Planning Session**

Hi Paul, Paula and Andrew

I'm really looking forward to our upcoming meeting on Wednesday 12 June.

To confirm, we are meeting at The Australian Catholic University, 127 Phillip Avenue, Watson. I'll ensure we finish our CMTEDD meeting at 9.30am so we can swing past and grab a coffee at ACU Café Yala, prior to the workshop starting at 10.00am.

I see this as a fantastic opportunity for us to slow down, connect, work and think together differently, at a vital time for us. To help us do this I have invited Andrew Bell from Samurai and Patrick Hollingworth. As with previous off-site Executive workshops, the shape of these meetings often changes, based on what is emerging or needed. Attached here is a current high-level shape of the meeting. We will be talking about what we as a team have before us and how we can best approach our various challenges and opportunities - but also how we will slow down, on-board/re-board ourselves to each other, get to understand our various views, and agree how we will work together as a relatively new team.

I have a few things to ask of you in preparation:

Please reflect on and come prepared to speak to your top 2-4 bullet point answers to the questions below:

<!--[if !supportLists]-->a. <!--[endif]-->What you see as your key focus areas/opportunities/priorities in your role over the next 12 months to take it to the next level of performance?

<!--[if !supportLists]-->b. <!--[endif]-->What you see as your biggest challenges and threats to progress? i.e. the things that do or will keep you up at night (metaphorically speaking)

<!--[if !supportLists]-->c. <!--[endif]-->What are your key interdependencies – with other parts of the business – that you want to explore/invest in?

<!--[if !supportLists]-->d. <!--[endif]-->In light of the above – where do you think you need to grow and develop as a leader to help deliver an amazing year ahead and what does our team need to work on and do differently together?

Please also watch/re-watch the video at this link about personal effectiveness and performance https://www.youtube.com/watch?v=fLqzYDZAqCI ahead of our meeting – to challenge all of our thinking

Something else I think will be helpful if you have 3 minutes is to watch this short video on Teams - and come prepared to share the implications and relevance for us… (This might challenge you to think about how you see this team) https://www.youtube.com/watch?v=BjE_mPoZPSg

I have attached a campus Map for you. Please note that the cafe and staff meeting room are both located in the Veritas building. The café is located on the ground floor to your left as soon as you enter the front of the building, and the meeting room is located on the first floor of the building. Once on the first floor you will be able to follow directional signage to the staff meeting room (301.1.17). Limited free off-street parking is available in the Holy Rosary Church carpark, which is accessible via 223 Antill

Street. Given that it is exam period please note that parking in this carpark may be limited. Alternative free street parking is available along Phillip Ave.

We can discuss this further at coffee in the morning and I look forward to working with you next Wednesday.

Regards
Leanne

From: Cover, Leanne
To: Cover, Leanne
Subject: Fwd: draft CEO Message
Date: Thursday, 22 August 2019 8:37:12 AM

Sent from my iPad

Begin forwarded message:

> **From:** <Leanne.Cover@cit.edu.au>
> **Date:** 21 August 2019 at 7:10:19 pm AEST
> **To:** <Alice.Clements@cit.edu.au>
> **Cc:** <[redacted]>, <Catherine.Hudson@cit.edu.au>
> **Subject: draft CEO Message**
>
> Al
>
> Draft message for your feedback. I'd like to get out by COB Thursday pls.
>
> Cathy - welcome back! With fresh eyes and mind you may also have some comments - all welcome.
>
> CEO Message
>
> **Strategic Compass update**
>
> As part of our ongoing commitment to the Strategic Compass, we'll shortly start a learning series of presentations and I invite all staff to attend as many of these sessions as possible. The series is being developed to help us all work towards honouring the Compass's four promises:
>
> * to raise CIT's ambitions to meet new expectations
> * to adapt CIT's offerings to provide skills for the future
> * to contribute to the new economy and position for prosperity
> * to invest in CIT's business for viability and value
>
> As you're all no doubt be aware, we've been guided by the Strategic Compass for nearly three years now, supported by the nine projects (some of which continue to operate and some of which have come to their natural conclusion). As we shift into the second half of the year and look further towards the future, it's likely we'll be releasing the second evolution of the Strategic Compass in early 2021, and underpinning it will be the same (or similar) promises. That's why we're developing the Strategic Compass series—to help you understand the thinking that underlies the promises, and to help you play your vital role in ensuring we meet them.

Incorporate into BAU - successful

This series will feel different to what you may expect from staff training over the years, and that's because it will be different; for starters, it won't be training. It will be an opportunity to gain a variety of perspectives about the broader context in which CIT, Canberra and the world of work is connected and situated in. We won't be training you how to do 'X or Y' in this series. What we will be doing is providing you with complimentary ways of looking at and understanding CIT (including its staff, its students, its processes and its technologies) and the place that it is positioned within the broader Canberra ecosystem.

Sessions will be held every 4-6 weeks for 60-90 minutes with complexity guide Patrick Hollingworth and you'll be presented with information to enable you to build upon your complimentary ways of looking at and understanding CIT and the broader Canberra ecosystem. The sessions will essentially be presentations with support material to both stimulate and challenge you and support the hard work needed from us all in the meeting of the four promises.

There is no one single activity that will suddenly allow CIT to be a transformed organisation ready to meet the immeasurable challenges of the third decade of the 21st Century. Rather, there are many, many things that we are doing to ensure that CIT continues to remain relevant and to meet the four promises of the Strategic Compass as we head into the year 2020. The first of these will be held on Friday 27 September and
Monday 28 October.

Please register here for the first presentation which will be on the theme of 'Networks' - Friday 27 September 9-10.30am at Reid [J block lecture theatre booking?][link registration here].

[redacted]

[redacted]

[redacted]

[redacted]

[redacted]

[redacted]

[redacted]

[redacted]

[redacted]

[redacted]

[redacted]

[redacted]

[redacted]

[redacted]

Leanne

Leanne Cover
Chief Executive

Canberra Institute of Technology
Tel: +(61) 02 6207 3107 **| Mobile:** +(61) 0404848583 **| Email:** leanne.cover@cit.edu.au
Address: CIT Reid, Room E109, 37 Constitution Avenue, Reid, Canberra **|** GPO 826, Canberra 2601
CRICOS No. 00001K

Connect with CIT on: cit.edu.au | Facebook | Twitter | YouTube | Linked in

Sent from my iPad

In the spirit of reconciliation, we acknowledge that we are on Ngunnawal land.

Please consider the environment before printing this email.

From:	Cover, Leanne
To:	Cover, Leanne
Subject:	Fwd: Evolving Together Contract Variation [DLM=Sensitive]
Date:	Monday, 23 September 2019 3:11:18 PM
Attachments:	image001.jpg ATT00001.htm CIT Letter of Variation Sep 19.docx ATT00002.htm

Sent from my iPhone

Begin forwarded message:

From: "Whale, Andrew" <Andrew.Whale@act.gov.au>
Date: 20 September 2019 at 7:17:23 am AEST
To: "Cover, Leanne" <Leanne.Cover@cit.edu.au>
Subject: Evolving Together Contract Variation [DLM=Sensitive]

Hi Leanne

Attached is the draft letter of variation to the contract for Patrick. Are you okay for me to sign and send it? Below is the timeline for the next contract that Ilze and I have developed.

Timeline
Timeframe for new process

Procurement Plan drafted	01/11/2019
Procurement Plan approved	03/12/2019
Gov Proc Board (if required)	28/01/2020
RFT drafted	03/02/2020
RFT approved	17/02/2020
RFT advertised	20/02/2020
RFT closes	19/03/2020
Tender evaluation	Mar 2020
Approval of Tender Evaluation Report	Mar/Apr 2020
Negotiations	Apr 2020
Contract awarded	08/05/2020
Debrief Unsuccessful Tenderers	June 2020

Andrew Whale
Executive Director, Corporate Services

Canberra Institute of Technology
Tel: **+(61) 02 6207 8960** **| Email:** **andrew.whale@cit.edu.au**
Address: **37 Constitution Avenue, Reid, Canberra** **|** **GPO 826, Canberra 2601**
CRICOS No. 00001K | RTO 0101

Connect with CIT on: cit.edu.au | Facebook | Instagram | Twitter | YouTube | LinkedIn

-

From: Cover, Leanne
To: Cover, Leanne
Subject: Fwd: LS 2
Date: Friday, 11 October 2019 1:38:19 PM

- this is my suggested text for the initial email invitation. You are of course free to use as much or as little of it as you like.

“Hello All,

As part of our ongoing commitment to the Strategic Compass, we’ll be running an ongoing learning-series over the next 12 months or so, and I’d like as many of us to attend as possible. The learning series is being developed to help us all work towards honouring the Compass’s four promises, which (just in case you’ve forgotten) are as follows:

* to raise CIT’s ambitions to meet new expectations
* to adapt CIT’s offerings to provide skills for the future
* to contribute to the new economy and position for prosperity
* to invest in CIT’s business for viability and value

As you’re all no doubt aware, we’ve been guided by the Strategic Compass for nearly three years now, supported by the nine projects (some of which continue to operate and some of which have come to their natural conclusion). As we shift into the second half of the year and look further towards the future, it’s likely we’ll be releasing the second evolution of the Strategic Compass in early 2021, and underpinning it will be the same (or similar) promises. That’s why we’re developing the learning series—to help you understand the thinking that underlies the promises, and to help you play your vital role in ensuring we meet them.

The learning series will feel different to what you’ve come to expect from staff training over the years, and that’s because it will be different; for starters, it won’t be training. We won’t be training you how to do X or Y or even Z, because that’s not what this learning series about. Training, be it how to better use XXX or how to manage XXX, is of course still very important to the continued growth and development of our workforce and to CIT, but it is only a means to an end, with that end being the meeting of the four promises. And while new initiatives and processes and technologies will be rolled out across CIT over the next XXX, and you will receive the training you need, you won’t find it in this learning series. What I hope you will find, however, are complimentary ways of looking at and understanding CIT (including its staff, its students, its processes and its technologies) and the place that it is positioned within the broader Canberra ecosystem.

Each month or thereabouts, an hour/90 minute long session will be held with our resident complexity thinker Patrick Hollingworth where you’ll be presented with information to enable you to build upon your complimentary ways of looking at and understanding CIT and the broader Canberra ecosystem. The sessions will essentially be lectures, with post-lecture material provided to you to help you consolidate your learning. You’ll need to arrive on time and be ready to think (hard) and learn (and take notes), because for many of you the content of these lectures will be equal parts stimulating and challenging. Being both stimulated and challenged goes hand-in-hand with the hard work needed from us all in the meeting of the four promises.

Sent from my iPhone

Begin forwarded message:

From: "Cover, Leanne" <Leanne.Cover@cit.edu.au>
Date: 11 October 2019 at 1:19:47 pm AEDT
To: "Cover, Leanne" <Leanne.Cover@cit.edu.au>
Subject: LS 2

re text for next learning series:

In the first learning series lecture, we learned how connectivity changes the nature of things, and the underlying (but also somewhat predictable) reason for this change. In the next lecture, we'll be learning about the patterns and structures that tend to emerge through this connectivity. In short, the lecture will be about networks, and how these dynamic structures shape the world in which we all live in.

Sent from my iPhone

From: Cover, Leanne
To: Cover, Leanne
Subject: Leanne reminder to send invite to DT
Date: Sunday, 12 May 2019 7:30:34 PM
Attachments: image001.jpg
image002.jpg
image002.jpg
image002.jpg

Sent from my iPad

Begin forwarded message:

> **From:** "Cover, Leanne" <Leanne.Cover@cit.edu.au>
> **Date:** 10 May 2019 at 11:41:52 am AEST
> **To:** "Cover, Leanne" <Leanne.Cover@cit.edu.au>
> **Subject: FW: Tentative dates from Patrick re CIT [SEC=UNCLASSIFIED]**
>
> **From:** Patrick Hollingworth [mailto:[redacted]
> **Sent:** Monday, 6 May 2019 1:24 PM
> **To:** Cover, Leanne <Leanne.Cover@cit.edu.au>
> **Cc:** Young, Lequita <Lequita.Young@cit.edu.au>
> **Subject:** Re: Tentative dates from Patrick re CIT [SEC=UNCLASSIFIED]
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> Subscribe to Patrick's fortnightly (ish) missive
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- 8 yes & 9 yes August ***can we do 7 & 8 August?***
- **20 & 21 August yes**

- ***can we do 3 & 4 and 25 and 26 September?***

Leanne

Sent from my iPhone

From:	Cover, Leanne
To:	Cover, Leanne
Subject:	Learning Series suggested text
Date:	Tuesday, 20 August 2019 7:16:34 PM

Learning Series suggested text

As part of our ongoing commitment to the Strategic Compass, we'll be running an ongoing learning-series over the next 12 months or so, and I'd like as many of us to attend as possible. The learning series is being developed to help us all work towards honouring the Compass's four promises, which (just in case you've forgotten) are as follows:

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It's quite likely that after the first two or three sessions you'll remain a little confused about how each of these seemingly isolated/disparate/unrelated topics are connected—but that's OK. What I'm asking all of you who attend is to stick with it and attend as many of the sessions as you can—over the 12 month period the connections between the sessions will become evident.

There is no one single bullet that will suddenly allow CIT to be a transformed organisation ready to meet the immeasurable challenges of the third decade of the 21st Century. That approach has been tried many times in the past, and let's be honest: it's an approach that rarely works. Rather, there are many, many things that we are doing to ensure that CIT continues to remain relevant and to meet the four promises of the Strategic Compass as we head into the year 2020. Of these many things, a lot have been less-than-visible to you over the past few years. The advent of this learning series is but one small example of the outcomes of this less-than-visible work. Over the next few years you will continue to see more of such things.

I hope to see you there (with notes at the ready).

Leanne

27 sept
28 oct
6 dec

Lc dates for sept
PIF
Craig
Learning series

Using every opp as a learning experience - What did you observe about yourself watching the video that relates to ET ?

Time and place for the SM- emergence

My suggestion-
What I was thinking
Ritual of group - polite
Information share , presentation
Pattern matching recognition
The challenge aboutvwhy SM
Slow thinking
ET approach be sceptical
Where is this going

Second video
The traditional approach to transformation. A ET
Assemblage theory concepts within the group
Constraints boundaries of the context
How different took work in different context

Many Concept s ET approach reinforced
The nature of the video voice, visual , content , the text
The various temporal and spacial scales
The use of story
The way information flows - Info/ knowledge what did you listen to accept dismiss, learn?
Building emergence
Constraints to build off
Variables
The space in between the things are the assumption not the thing
The hypothesis - amuse and effect
Bias slow thinking fast thinking
The value of different perspective
Why the hard yards of K building before action matter
The Hawthorn effect - lights up down
The constraints of only applying one method or if holding one truth
Disapprove
Divergent and Convergence - in thinking - the BC mode all at one on use
Sceptical - optimistic -

Critique
Don’t work together as well as they could
Hinder brand?
Hypothesis duplication by both
Prediction 80% delivered ? How that relates to working together?
Data - extraction ?

Sent from my iPhone

From: "Cover, Leanne" <Leanne.Cover@cit.edu.au>
Date: 18 April 2019 at 3:02:36 pm AWST
To: Patrick Hollingworth
[redacted]
Subject: Re: CIT Evolving Together and campus renewal request

Patrick
Thank you for your confirmation that you are able to provide the additional requested service to CIT. I agree to the fee below for the work a you have outlined and request you proceed.

I look forward to progressing the work with you over the coming weeks.

Regards
Leanne

Sent from my iPhone

On 18 Apr 2019, at 4:25 pm, Patrick Hollingworth [redacted] wrote:

> Thanks Leanne.
>
> I'm writing to confirm my capacity to provide the additional services as per your below email.
>
> I've identified a suitable approach that will revolve around the running of a week-long design workshop with experienced architects.
>
> The workshop will include an exploration of the work of the Strategic Compass to date (identifying key concepts, principles and opportunities relevant to the built environment), an exploration of 2-3 precedent examples of contemporary adaptable learning environments (this may include additional input from experts in the field to gain in-depth insight into current cutting edge architectural thinking around educational design), and development of a series of 'parti's' (architectural concepts/ organising thoughts) that draw from the vision and precedents and articulate CIT's

campus renewal intentions and its connection to the Strategic Compass.

I envisage delivering an artefact that takes the form of a report interspersed with drawings and imagery, with its presentation likely to be more along the lines of a 'design folio' where imagery and text are graphically presented together in a landscape format rather than a traditional written report.

The fee for this additional component of work [redacted] Please advise if this is acceptable to you.

Thanks

<image002.jpg> www.patrickhollingworth.com
<image003.jpg><image003.jpg><image003.jpg>
Subscribe to Patrick's fortnightly (ish) missive
Check out Patrick's book The Light and Fast Organisation

On 6 Apr 2019, at 9:31 PM, Cover, Leanne <Leanne.Cover@cit.edu.au> wrote:

Dear Patrick

Thank you for your time last week to discuss the provision of additional services for Evolving Together under the current agreement between Red Rouge Consultants and the Canberra Institute of Technology (CIT). The additional services I am requesting refer to CIT's campus renewal strategy which is a key component of the CIT Strategic Compass 2020, therefore the request is within the existing Evolving Together agreement.

As you are aware the Strategic Compass 2020 guides CIT's evolution in the delivery of four promises to the ACT community (our students, staff, industry, employers, government and other members of the community).

Specifically I'm requesting the development of an artefact that considers how architecture and design services for CIT's campus infrastructure renewal can be viewed through the lens of the CIT Strategic Compass 2020 Evolving Together, our promises and as an enabler for creating context for CIT's evolution. The work may take the form of a written document or you may wish to suggest an alternative form of presenting the concepts and ideas.

As CIT's understanding and appreciation of greater interconnectivity of the Compass projects and the broader intent of the Strategic Compass develops (internally and externally) I anticipate the additional work I am requesting would replace or be integrated into documents that articulate CIT's intentions around campus renewal and Evolving Together more broadly.

To assist you in understanding CITs current framing around 'a new CIT campus' please see the content below developed by the project team. Note this content is not yet connected to Evolving Together (as articulated in the *Evolving Together CIT Futures* Board paper, February 2019) and is also limited in expressing CIT's future possibilities and the intent and interconnectivity of the Strategic Compass and the greater Canberra ecosystem to which CIT belongs.

Could you please consider the above request and provide me with a quote for the services. Under the current Evolving Together contract CIT can pay for additional services with prior approval. I would like to complete the work by the end of April 2019 if possible.

I would be happy to discuss further or answer any questions that you may have.

Regards

Leanne

Leanne Cover
Chief Executive

Canberra Institute of Technology
Tel: +(61) 02 6207 3107 | Mobile: +(61) 0404848583 | Email: leanne.cover@cit.edu.au
Address: CIT Reid, Room E109, 37 Constitution Avenue, Reid, Canberra | GPO 826, Canberra 2601
CRICOS No. 00001K

Connect with CIT on: cit.edu.au | Facebook | Twitter | YouTube | Linked in

In the spirit of reconciliation, we acknowledge that we are on Ngunnawal land.
Please consider the environment before printing this email.

<image001.jpg>

A NEW CIT CAMPUS

The investment in the redevelopment of the CIT Reid campus confirms the ACT Governments commitment to learning and innovation and acknowledgement of the importance of strong and *effective collaboration between business, industry, the community and the education sector. The new campus will redefine the traditional role of a tertiary education provider in a way that binds CIT into the future economic and social fabric of the ACT and the surrounding region.*

The campus will be a vertical learning environment designed to foster interaction, innovation, collaboration and partnerships between students, staff, business, industry, government and the community. By incorporating dedicated spaces for local business to become imbedded into CIT, the campus will become a place where future generations of entrepreneurs and innovators can connect, be inspired, be educated. It can expose students to live work environments and connect ideas to transform into new start-ups and established businesses to transform into competitive global players.

The campus building will include the digital capacity and connectivity to allow courses to be delivered in a more flexible and responsive learning environment, designed with the flexibility to adopt new advances in technology and practices. It will have the adaptability allowing the building to physically respond to meet the changing needs of an evolving *modern workplace while providing an inspiring and engaging environment for those who work and study there.*

Most importantly, the building itself will be a modern, functional and stimulating teaching environment that supports innovative flexible learning practices, create an invigorating and enriching environment to learn that will future proof CIT.

The building design will include a series of informal and formal learning environments focusing on peer-to-peer education and technology-enabled collaborative learning. The building is to be an interconnected work environment where the centrepiece is a series of dynamic student commons distributed throughout the learning floors. The informal, collaborative learning spaces are conducive to the exchange of ideas, social engagement and create an innovative networked envoirnment of learning for the future.

The building aims to simulate real work environment where students work collaboratively on projects rather than assignments, projects that involve working across disciplines and engage with CIT's commercial and industry partners. CIT commercial operations are to become a central focus for student *training in live work environments.*

CIT is extending:

- *the principles of the 'flipped classroom' where conventional classroom activities become homework activities which allows class time to focus on problem solving, team work and group learning, with a simulated work environment which is designed to enable integrated technology-rich learning;*
- *'bring your own device' (BYOD) to replace the rooms dedicated to CIT provided computers, and*
- *new shared learning spaces which avoid the traditional concept of 'owning a space' and the associated inefficiencies and underutilisation of space.*

These initiatives will allow students to increase the time spent in specialist workshops and studios and reduce the demand for traditional classrooms and computer laboratories.

The building will be designed to:

- *provide students with a simulated work* *environment rather than a traditional education environment;*

- *foster collaboration and interaction between departments*
- *foster collaboration and interaction between students, business and industry;*
- *allow flexibility and easy adaptability to be responsive to change;*
- *be technology-enabled and future proof;*
- *facilitate innovation and incubator for start-up ventures;*
- *enable formal and informal learning environments;*
- *provide a high degree of exposure of learning activities;*
- *encourage students to remain on campus;*
- *be environmentally sustainable; and*
- *be a showcase for student work*

Sent from my iPad

This email, and any

From: Cover, Leanne <Leanne.Cover@cit.edu.au>
Sent: Tuesday, 25 June 2019 5:44 PM
To: Ganendran, Jaci <Jaci.Ganendran@cit.edu.au>; Johnston, Gerard <Gerard.Johnston@cit.edu.au>; Miller, Jayne <Jayne.Miller@cit.edu.au>; Dace-Lynn, Fiona <Fiona.Dace-Lynn@cit.edu.au>; Wesney, Anita <Anita.Wesney@cit.edu.au>; Mills, Sam <Sam.Mills@cit.edu.au>; Douglas, Piers <Piers.Douglas@cit.edu.au>; Whale, Andrew <Andrew.Whale@cit.edu.au>; Ryan, Paul <Paul.Ryan@cit.edu.au>; McKenry, Paula <Paula.McKenry@cit.edu.au>; Folk, James <James.Folk@cit.edu.au>; Norris, Rikki <Rikki.Norris@cit.edu.au>; Neuendorf, Penny <Penny.Neuendorf@cit.edu.au>; King, Jason <Jason.King@cit.edu.au>
Cc: Patrick Hollingworth [redacted]
Subject: CIT Evolving Together session last Thursday FW: It's all about juggling [SEC=UNOFFICIAL]

Hi Everyone

Thanks for attending the DT session last Thursday. Below is Jason’s juggling analogy that Patrick referred to during the session. Thanks Jason.
Terrific description, one we can all relate to.

Leanne

[redacted]

[redacted]

[redacted]

[redacted]

[redacted]

[redacted]

[redacted]

From:	Leanne Cover
To:	Patrick Hollingworth
Cc:	Cover, Leanne
Subject:	Reading rule breaking?
Date:	Monday, 29 April 2019 11:07:41 PM

Patrick

Great to speak with you today.

This was the reading 'rabbit warren' I went down - but it was Easter ! :)

Stuart Kauffman - https://www.edge.org/conversation/stuart_a_kauffman-the-adjacent-possible and this one https://www.edge.org/conversation/stuart_a_kauffman-beyond-reductionism-reinventing-the-sacred The Edge .Org had a whole lot of other really cool links to some of his other work - which of his books are you reading?

CAS and Healthcare article http://adaptknowledge.com/wp-content/uploads/rapidintake/PI_CL/media/Begun_Zimmerman_Dooley.pdf .

Complexity: A Leader's Framework for Understanding and Managing Change in Higher Education https://er.educause.edu/articles/2018/10/complexity-a-leaders-framework-for-understanding-and-managing-change-in-higher-education The references in this article were pretty interesting.......below

Donella H Meadows - Places to Intervene in a system http://www.wholeearth.com/issue/2091/article/27/places.to.intervene.in.a.system

Complexity Leadership Part 1: Conceptual Foundations https://books.google.com/books/about/Complexity_Leadership.html?id=UvknDwAAQBAJ

Regards

Leanne

Canberra Institute of Technology Board

Board Meeting No. 01/2020

19 February 2020

Chair Notes

Agenda Item:	**2.5**
Agenda Title:	**CIT Board Strategic Planning Workshop**

Outcome sought: Provide Board members with an opportunity to discuss and provide input into the Strategic Planning Workshop.

Key talking points

- [redacted]
- It is also our view that we need to continue the evolving together change program as part of CIT's ongoing transformation. Organisation wide change in the direction of the 4 promises is a long game, particularly at CIT, given the context and constraints we operate within.
- [redacted]
- I have asked Patrick Hollingworth, who is working closely with CIT to guide us in contemporary organisational change approach, to attend the Strategic Planning Workshop.
- [redacted]

Additional notes from Patrick Hollingworth conversation

Some of the approaches we have been looking at in our Evolving Together approach include the notion of understanding the various contexts in which CIT operates in. As a Board we need to understand the multiple temporal and spatial scales and context-specific approaches to guide CIT's ongoing evolution (and meeting of the four promises).

For example:

Our key temporal scales are:
- the next 12 months i.e. 2020
- the period relevant to the next strategic compass i.e. 2020-2023
- from now until the move to Woden at the beginning of 2024 and beyond to 2030

The challenge for the board is to be able to hold these three different temporal scales AT THE SAME TIME. It is not a matter of this, then that, and then that, but rather this, and this, and this, all unfolding at once. The challenge for the board is also to consider the notion of context-specific approaches, meaning that they must understand each of these different temporal scales (likewise with spatial scales, which we address below) as different contexts. Each different temporal and spatial scale is a different context which requires its own unique context-specific action or response. The Futures paper has already given us an insight into the different context-specific actions as they relate to the temporal scales:

1. **Projection** (we plan forwards and prepare for the next 12 months, with the board's nine priorities guiding us)
2. **Probabilities** (we prepare for a discrete number of possible futures from now until the end of 2023, with the current and future strategic company guiding us)
3. **Possibilities** (we design contexts now and on an ongoing based and influence possible multiple futures beyond 2024, with the current and future strategic company guiding us)

Critically, these different temporal scales are not isolated and discrete, but rather connected, interdependent and nested. So, what happens in the next 12 months alters the course of what happens in the next three years, and the next ten, and so on. But, at the same time, the actions taken to maintain, alter or change trajectories over the next ten years, or three years, will also impact what happens in the next 12 months. Again, the different contexts are not discrete and isolated, but rather connected, interdependent, and nested.

Being able to hold these three different temporal scales at the same time and being able to understand each of these different temporal scales as different contexts means that, quite literally, the ways in which we hold these different contexts must be different.

From:	Cover, Leanne
To:	Young, Lequita; Hudson, Catherine
Cc:	Cover, Leanne
Subject:	2.6 CIT Board Strategic Planning Workshop (002) (004).docx [SEC=UNCLASSIFIED]
Date:	Tuesday, 18 February 2020 5:02:02 PM
Attachments:	2.6 CIT Board Strategic Planning Workshop (002) (004).docx

Canberra Institute of Technology Board

Board Meeting No. 01/2020

19 February 2020

Chair Notes

Agenda Item: 2.5

Agenda Title: **CIT Board Strategic Planning Workshop**

Outcome sought: Provide Board members with an opportunity to discuss and provide input into the Strategic Planning Workshop.

Key talking points

- [redacted]
- [redacted]
- It is also our view that we need to continue the evolving together change program as part of CIT's ongoing transformation. Organisation wide change in the direction of the 4 promises is a long game, particularly at CIT, given the context and constraints we operate within.
- [redacted]

Background

- [redacted]
- I have asked Patrick Hollingworth, who is working closely with Leanne to guide us in contemporary organisational change approach, to attend the Strategic Planning Workshop.

Notes from Patrick Hollingworth

Some of the approaches we have been looking at in our Evolving Together approach include the notion of understanding the various contexts in which CIT operates in. As a Board we need to understand the multiple temporal and spatial scales and context-specific approaches to guide CIT's ongoing evolution (and meeting of the four promises).

For example:
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Being able to hold these three different temporal scales at the same time and being able to understand each of these different temporal scales as different contexts means that, quite literally, the ways in which we hold these different contexts must be different.

From:	Cover, Leanne
To:	Cover, Leanne
Subject:	2.6 CIT Board Strategic Planning Workshop (002).docx [SEC=UNCLASSIFIED]
Date:	Tuesday, 18 February 2020 4:59:48 PM
Attachments:	2.6 CIT Board Strategic Planning Workshop (002).docx

From: Cover, Leanne <Leanne.Cover@cit.edu.au>
Sent on: Thursday, March 26, 2020 2:38:48 AM
To: Hudson, Catherine <Catherine.Hudson@cit.edu.au>; Young, Lequita <Lequita.Young@cit.edu.au>
CC: Cover, Leanne <Leanne.Cover@cit.edu.au>
Subject: Fwd: CIT Board planning day April 1

Sent from my iPad

Begin forwarded message:

> **From:** "Cover, Leanne" Leanne.Cover@cit.edu.au
> **Date:** 26 March 2020
> **To:** [redacted], Patrick Hollingworth [redacted]
> **Subject: Re: CIT Board planning day April 1**
>
> Hi Craig and Patrick
>
> In line with our discussions today. I'll clean up the cover email from Craig in the morning (for Craig to send to the Board).
>
> In addition arrangements are as follows:
>
> 1. Participants : note slight change, down 2
>
> - 9 board members (including CS &LC)
> - No audit committee members
> - 4 executives (adding CIT Solutions GM)
> - 1-2 CIT secretariat /tech
> - 2 from PH business (including PH)
>
> 2. Penny Neuendorf (CIT tech) will set up and host the webex meeting and be in the session on 1 April to give tech support. Lequita will send Board webex instructions tomorrow and offer members to join Penny for one of two quick (10min) navigation tutorials she will offer Friday morning 27/3 or Monday 30/3.
>
> 3. Papers - I'll attach the 3 papers: HBR article, Board Musings paper (I have a clean version) and the CIT Futures paper - 2919 Board paper.
>
> 4. Timing: three-ish hours. Have I got the timing right?

From: Young, Lequita <Lequita.Young@cit.edu.au> on behalf of Cover, Leanne
Sent on: Thursday, April 9, 2020 4:30:11 AM
To: Patrick Hollingworth <[redacted]>
CC: Cover, Leanne <Leanne.Cover@cit.edu.au>
Subject: RE: CIT Board Strategic Session - making sense excercise [SEC=UNCLASSIFIED]

Hi Patrick – email addresses for [redacted]

[redacted]

Regards
Lequita

Lequita Young
Executive Assistant to the Chief Executive

Canberra Institute of Technology
Tel: 02 6207 3103 | **Mobile:** [redacted] **Email:** lequita.young@cit.edu.au
Address: CIT Reid, Room E108, 37 Constitution Avenue, Reid, Canberra | GPO 826, Canberra 2601
CRICOS No. 00001K

From: Patrick Hollingworth <[redacted]>
Sent: Thursday, 9 April 2020 1:55 PM
To: Cover, Leanne <Leanne.Cover@cit.edu.au>
Subject: Fwd: CIT Board Strategic Session - making sense excercise

Hi Leanne,

it seems as thought Peter's email is not able to receive my email below, and I've also had a bounce back from [redacted] (which I had assumed is [redacted]

Can you please clarify if thes two addresses are the correct ones?

www.patrickhollingworth.com

Subscribe to Patrick's fortnightly (ish) missive
Check out Patrick's book The Light and Fast Organisation

Canberra Institute of Technology Board

Board Meeting No. 03/2020
29 July 2020

CIT Board Paper

Agenda Item:	**2.1**
Agenda Title:	**CEO Update**
Outcome:	**Noting**

Recommendation:

The CIT Board notes the information contained in this update.

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Evolving Together

Wardley Mapping

31. As part of the Evolving Together work, a group of nine staff members from diverse areas across the organisation have spent four weeks exploring the principles and concepts around Wardley Mapping and applying this learning to develop greater situational awareness of the different scales and contexts CIT is operating within. Wardley Mapping is a learning and communication tool that assists in guiding strategy by making things and their connections more visible and enabling us to make better decisions before acting.

32. This work has been guided by the CEO and Think Garden (Patrick Hollingworth) and has included aspects of journaling, sensemaking and the practical application of mapping processes, services and systems based on the needs of the user/CIT customer. The mapping is nested within the CIT Evolving Together Base Camp Framework and the overarching approach of CIT becoming a system that learns which will support CIT to adapt our offerings to meet new expectations.

[redacted]

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39. [redacted]

[redacted]

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[redacted]

[redacted]

47. [redacted]

[redacted]

[redacted]

[redacted]

[redacted]

[redacted]

[redacted]

[redacted]

Sharp, Rebecca (CIT)

From:	Cover, Leanne
Sent:	Monday, 14 September 2020 6:13 PM
To:	Cover, Leanne
Subject:	FW: FOR CLEARANCE: CIT Audit Committee CEO Update
Attachments:	3.1 CEO Update Report_Audit Committee.docx; 2.1 CEO Update.docx; 2.1b Vector Consulting - CIT Industry Reference Group v8.pptx; 2.1c Media coverage summary January - May 2020.pdf

---

From: Sporcic, Rebecca <Rebecca.Sporcic@cit.edu.au>
Sent: Thursday, 10 September 2020 1:07 PM
To: Cover, Leanne <Leanne.Cover@cit.edu.au>
Cc: Young, Lequita <Lequita.Young@cit.edu.au>
Subject: FOR CLEARANCE: CIT Audit Committee CEO Update

OFFICIAL

Good afternoon Leanne,

Please see attached the CEO Update Brief for the upcoming Audit Committee meeting. I have only included items that have occurred since the last audit committee meeting. I will also attach the CEO report that was provided at July Board meeting (attached also).

Please let me know if you would like me to make any changes. Would it be possible to discuss or clear by Friday COB or by Monday 14 September?

Kind regards,
Bec

Rebecca Sporcic
A/g Executive Officer to the Chief Executive Officer
Office of the Chief Executive

Canberra Institute of Technology
Tel: +(61) 02 6207 4073 **| Mobile:**[redacted] **| Email:** rebecca.sporcic@cit.edu.au
Address: CIT Reid, Room A202, 37 Constitution Avenue, Reid, Canberra **|** GPO 826, Canberra 2601

MINUTES

Canberra Institute of Technology Board

Meeting No. 02/2020
Video-conference using WebEx
Wednesday, 29 April 2020
8:30am – 12:00pm

IN ATTENDANCE:

Members: Mr Craig Sloan (Chair), Ms Kate Lundy (Deputy Chair), Ms Leanne Cover, Mr Peter McGrath, Mr Raymond Garrand, Mr Nigel Phair, Professor Frances Shannon, Ms Jane Madden, Mr Sam Mills

Apologies: Mr David Slaney

Secretariat: Ms Cathy Hudson, Ms Lequita Young

[redacted]

[redacted]

The Chair requested that *Item 2.3 Strategic Compass Development – Next Steps,* being facilitated by Mr Patrick Hollingworth, be discussed directly after the opening and administration items. Members agreed to this change in the agenda.

[redacted]

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- [redacted]

[redacted]

- [redacted]

[redacted]

[redacted]s.

2.3 Strategic Compass Development – Next Steps

This item was facilitated by Mr Patrick Hollingworth of Think Garden.

Mr Hollingworth provided a recap of the previous session and provided some reflections from members. A paper *CIT Strategic Compass 2020 Onwards: A System That Learns* (see attached) was provided to members as a follow-up to the strategic direction session held with the Board on 7 April.

Mr Hollingworth went through the paper with members highlighting the importance of CIT's people co-evolving and adapting together. The four promises require CIT to be an adaptive system that learns. CIT is a system that is starting to learn.

The next part of the process is to develop a topology of the future, and looking at projections (single present future), probabilities (multiple present futures) and possibilities (multiple future presents). A system that learns is both spatial (a space created by people and connections) and temporal (systems i.e. finance). The four pillars are still considered relevant in 2020 but a re-sequencing allows the promises to be grouped into two: the first two promises are externally facing, and the second two promises are internally facing:

1. To raise CIT's ambitions to meet new expectations
2. To contribute to the new economy and position for prosperity
3. To adapt CIT's offerings to provide skills for the future
4. To invest in CIT's business for viability and value.

Mr Hollingworth asked can we build a bridge from the presentation to a discussion on where do we go with the strategy? In response, the Chair asked for members' feedback on the presentation before addressing the question. Members highlighted the following issues:

- The importance of looking at the 5-10 year time-frame and not missing opportunities if our next strategy is 'business as usual' when we are not in a 'business as usual' situation;
- Presentation takes the Board to the world's big socio economic issues, the what ifs and possibilities;
- COVID-19 situation presents us with an opportunity to look at whether our organization is fit for purpose for a world that is not going to be the same and seek to maximize opportunities as they arise;
- Expectation is for next strategy to be more externally focused looking at what is happening in the economy and industries;
- Discussion on the four pillars and whether there has been a discussion about exploring other options – are these the right ones?
- Approach and language is very different and can be challenging;
- Staff perspective – staff are comfortable with the four promises in current Strategic Compass; and
- Query around categorisation of CIT staff in the paper might not be appropriate. Important to remember the heart and purpose of the organization is learning and the role of teachers in that learning.

The Chair, CEO and Mr Hollingworth clarified looking at both the external and internal environment as part of the development of the Strategic Compass and looking at possibilities (not business as usual), looking at what could we do that we are not doing now for the future of education and work, exploring 'what ifs' of the world and where Australia fits in the new picture, and looking at CIT as part of the broader picture (not in isolation).

The Chair, CEO and Mr Hollingworth will work on a framework document and send out to the Board for feedback. This document will have examples added in.

Action: The Chair, CEO and Mr Hollingworth will work on a framework document and send out to the Board for feedback.

[redacted]

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[redacted]

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[redacted]

[redacted]

From: Young, Lequita on behalf of Cover, Leanne
To: Cover, Leanne
Subject: FW: Draft Board Minutes [SEC=UNCLASSIFIED]
Date: Tuesday, 2 June 2020 8:35:32 AM
Attachments: image001.jpg
CIT Draft Minutes 29 April 2020.docx

From: Young, Lequita
Sent: Thursday 28 May 2020 13:11
To: Cover, Leanne
Subject: Draft Board Minutes [SEC=UNCLASSIFIED]

Leanne – please see attached the draft Board Minutes for approval to send to Craig.

Regards
Lequita

Lequita Young
Executive Assistant to the Chief Executive

Canberra Institute of Technology
Tel: 02 6207 3103 | Mobile: [redacted] | Email: lequita.young@cit.edu.au
Address: CIT Reid, Room E108, 37 Constitution Avenue, Reid, Canberra | GPO 826, Canberra 2601
CRICOS No. 00001K

Connect with CIT on: cit.edu.au | Facebook | Twitter | YouTube | LinkedIn

CITsignature_Orange_Pink

Evaluation Summary

PROJECT DETAILS	
Tender Number	GS002147.110
Tender Name	Provision of Organisational Transformation Strategic Guidance and Mentoring Services to CIT 2020 to 2021

WEIGHTED ASSESSMENT CRITERIA	WEIGHTED CRITERIA 1	WEIGHTED CRITERIA 2	WEIGHTED CRITERIA 3	WEIGHTED CRITERIA 4	WEIGHTED CRITERIA 5
HEADING	Experience, Capability and Capacity	Understanding of the CIT Strategic Compass 2020 and ability to develop high quality Services relevant to	Methodology	Qualifications, Organisational Structure and Suitability of Specified Personnel	LIPP
WEIGHTING (%)	25	25	20	20	10

SCORE FOR ASSESSMENT CRITERIA						
Tenderer	WEIGHTED	WEIGHTED	WEIGHTED	WEIGHTED	WEIGHTED	Total Weighted Score

[redacted]

Subject to 3rd Party Consultation

[redacted]

[redacted]

[redacted]

Subject to 3rd Party Consultation

[redacted]

[redacted]

[redacted]

[redacted]

Hollingworth	Patrick Hollingworth	568,333.33	Patrick Hollingworth	568,333.33	Patrick Hollingworth, [redacted]	568,333.33	Travel, tools and disbursements	Detailed	1 price, 1,705,000

[redacted]

Subject to 3rd Party Consultation

[redacted]

Procurement ACT

ACTGOV GS002147.110 - RFx Evaluation Report

Provision of Organisational Transformation Strategic Guidance and Mentoring Services to CIT 2020 to 2021

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1. Executive Summary

1.1. Introduction

1.1.1. This Evaluation Report is for the Request for Tender (RFT) – GS002147.110 – Provision of Organisational Transformation Strategic Guidance and Mentoring Services to CIT 2020 to 2021, and describes the evaluation process that was undertaken in accordance with the RFT and the approved Evaluation Plan.

1.1.2. This Evaluation Report also details the outcomes of the Value for Money assessment and provides recommendations to the Delegate for the overall evaluation outcome.

1.2. Background

1.2.1. The environment in which all large public institutions operate continues to change at a rapid pace. A variety of factors including economic, social, environmental and technological, are impacting CIT simultaneously. These factors are reshaping expectations, changing the nature of how work is conducted and posing challenges and opportunities for not only CIT but for its students, industry, employers, government and the broader community.

1.2.2. To position CIT for a viable and sustainable future it must shift its employee culture towards a direction that enables CIT staff to meet the emerging training needs of its customers. This direction is one that values increased staff responsiveness and flexibility, and less reliance upon external stakeholder support. This direction recognises that CIT is not an isolated entity, but rather a vital member of the broader Canberra ecosystem. CIT's Board and the Chief Executive Officer (CEO) strongly support this direction.

1.2.3. To deliver on the Boards desired directional shift in CITs ability to adapt and evolve with the ACT ecosystem CIT recognises the need for a contemporary approach to organisational transformation.

1.2.4. The most important aspect of CIT's evolution is CIT's ability to fully realise all of the potential benefits through investing in our people as part of a learning and growth organisation and building on the platform for evolution that has commenced through the elements of the Strategic Compass.

1.2.5. GS002147.110 – Provision of Organisational Transformation Strategic Guidance and Mentoring Services to CIT 2020 to 2021 was developed utilising the Procurement ACT suite of tendering documents with the assistance of Procurement ACT.

1.2.6. In accordance with the *Government Procurement Act 2001* and the *Government Procurement Regulation 2007*, the RFT was issued by the Territory as a Public Tender via Tenders ACT on 26 February 2020 and closed at 2:00pm (ACT Local Time) on 24 March 2020.

1.2.7. Two addenda were issued providing answers to questions of clarification in relation to the RFT and amend the Response Schedule which included a duplicate table.

1.2.8. All Tender responses were lodged using the Tenders ACT electronic distribution functionality, which allows potential Suppliers to submit Tender responses to a secure electronic Tender Box via the Tenders ACT website.

2. Tender Evaluation Team Membership

2.1. Evaluation Team

The Evaluation Team comprised the following members:

ROLE	NAME
Evaluation Team Chair	Andrew Whale
Member	Cheryl Steff
Member	Fiona Mitchell

Original team member Paula McKay was replaced by Cheryl Steff in early March 2020. The external team member Al McLean was replaced after the tender closed due to his inability to assist due to the additional work pressures the Covid-19 pandemic had placed on his role. Given the impact Covid 19 was having on Executives and Senior Managers across the ACTPS it was agreed that under these extraordinary circumstances CIT would replace Al McLean on the Evaluation team with Fiona Mitchell Director of the Business and Leadership college at CIT.

2.2. Technical / Specialist Advisors

The Evaluation Team was supported throughout the evaluation by the following Technical and/or Specialist Advisors, who were called upon on an 'as-required' basis:

TECHNICAL / SPECIALIST ADVISORS	
Advisor	Ilze Kemp Senior Manager CIT Procurement, Contracts & Records Management

2.3. Probity, Disclosure of Conflicts of Interest and Confidentiality

2.3.1. All members of the Evaluation Team were asked to disclose any conflict of interest or association they might have with the Tenderers that have submitted Tender responses.

2.3.2. Cheryl Steff disclosed a conflict of interest with [redacted] to the chair of the Evaluation Team on 30 March 2020. Cheryl has an ongoing friendship with one of the staff members, however has not had any contact with them since before being appointed to the evaluation team. The Chair asked that Cheryl not read the submission from IntegrationQA and decided that only the Chair and Fiona Mitchell will score the response.

2.3.3. No other Evaluation Team member has disclosed that he or she has a conflict of interest or association with any of the Tenderers.

2.3.4. All documents and proceedings of the Evaluation Team have been treated as confidential.

3. Evaluation Overview

3.1.1. The evaluation was conducted in accordance with the guidelines and methodology detailed in the approved Evaluation Plan refer to **Schedule 1 – Approved Evaluation Plan.**

3.1.2. The evaluation was based upon the requirements published in the RFT and the Assessment Criteria set out in the approved Evaluation Plan. The evaluation approach utilised a weighted scoring system supported by qualitative judgement.

4. Assessment Criteria

4.1. Threshold Assessment Criteria

There were no Threshold Assessment Criteria.

4.2. Weighted Assessment Criteria

Tender responses were assessed against the following Weighted Assessment Criteria:

NO.	WEIGHTED ASSESSMENT CRITERIA	WEIGHTING
WC 1	**Experience, Capability and Capacity** Tenderers must provide information demonstrating their past performance and experience in the provision of similar Services. Tenderers must provide the: a) name of the organisation for whom the Services were provided; b) when the Services were provided as well as the period over which the Services were provided; and c) an outline of the outcomes achieved.	25%
WC 2	**Understanding of the CIT Strategic Compass 2020 and ability to develop high quality Services relevant to CIT** Tenderers are required to provide information demonstrating their understanding of CITs Strategic Compass 2020 - Evolving Together and any VET or CIT specific legislation and policies that may be incorporated in the provision of the Services detailed in the **Statement of Requirements.**	25%

NO.	WEIGHTED ASSESSMENT CRITERIA	WEIGHTING
WC 3	<u>**Methodology**</u> Tenderers are required to provide a program approach demonstrating how the Services will be delivered within the timeframes set out in the **Statement of Requirements.**	20%
WC 4	<u>**Qualifications, Organisational Structure and Suitability of Specified Personnel**</u> Tenderers are to provide details of: a) their organisational structure and location of operations; b) any professional bodies to which the Tenderer and specified personnel are accountable to; c) the skills and experience of specified personnel including at a minimum, a Curriculum Vitae (CV) with the following evidence: i) name; ii) position/level; iii) specific area/s of subject matter expertise; iv) qualifications including certificates/registration; v) number of years' experience; and vi) brief description of key projects undertaken/completed.	20%
WC 5	<u>**Local Industry Participation Policy**</u> CIT will assess the extent to which the Tenderer has demonstrated that it will ensure capable local businesses are given full, fair and reasonable opportunity to participate in the provision of the Services during the term of the proposed contract.	10%

4.3. Non-Weighted Assessment Criteria

Tender responses were assessed against the following Non-Weighted Assessment Criteria:

NO.	NON-WEIGHTED ASSESSMENT CRITERIA
NWC 1	**<u>Price</u>** Tenderers are required to complete the Pricing Schedule. All pricing breakdown categories within the Schedule should be populated. The Tenderer must provide a fixed fee for the twenty (20) month contract period. Prices are to be in Australian Dollars and GST inclusive.
NWC 2	**<u>Referee Reports</u>** The Tenderers are to provide contact details of three referees, including: a) Name; b) Organisation; c) Address; d) telephone number; and e) email address; that are able to attest to the capacity of the Tenderer against the **Statement of Requirements.**

5. Stage 1: Receipt and Registration of Tender Responses

5.1. Stage 1A: Lodgement

5.1.1. Tender responses were received and registered in accordance with the approved Evaluation Plan and the Territory's electronic Tender Box protocols.

5.1.2. 12 responses were received from the following Tenderers by the Closing Time and Date and registered by the Tenders ACT team:

[redacted]

(8) Redrouge Nominees Pty Ltd as the Trustee for the Patrick Hollingworth Family Trust, ACN 159 204 323/ABN 98 563 981 390;

[redacted]

5.1.3. The response was registered in the Goods and Services Electronic Document and Record Management System (EDRMS).

5.2. Stage 1B: Late Tenders

There were two late tenders submitted from:

[redacted] Given the pandemic Tenderers were attempting to submit from home and were experiencing unexpected errors. The Evaluation Team does not believe either Tenderer had an unfair advantage by submitting a late tender and both were accepted for evaluation.

6. Stage 2: Compliance Assessment

6.1. Stage 2A: General Compliance

6.1.1. Procurement ACT undertook a conformity/compliance check on all lodged Tender responses.

6.1.2. All Tender responses were assessed as compliant with the general compliance requirements and proceeded to **Stage 3: Technical Assessment**.

6.2. Stage 2B: Threshold Assessment Criteria

There were no Threshold Criteria.

6.3. Stage 2C: Incomplete Tender Responses

All Tender responses were assessed as complete and proceeded to **Stage 3: Technical Assessment**.

6.4. Stage 2D: Redaction and Removal of Pricing Information

6.4.1. In accordance with the approved Evaluation Plan, pricing elements were redacted and removed from all Tender responses to ensure a two-stage evaluation process was conducted, whereby price does not influence evaluation of the technical assessment.

6.4.2. Pricing elements were provided to the Evaluation Team at the completion of the **Stage 3: Technical Assessment**, in preparation for the **Stage 4: Pricing Assessment**, **Stage 5: Risk Assessment** and **Stage 6: Value for Money Assessment**.

7. Stage 3: Technical Assessment

7.1. Stage 3A: Technical Evaluation

7.1.1. The Evaluation Team considered all relevant information, conducted an objective analysis and scored each evaluation criterion of the Tender responses using the Scoring Scale as detailed in the approved Evaluation Plan.

7.1.2. The Evaluation Team undertook the technical assessment of tenders in two virtual session using WebEx on the 1st and 2nd of April 2020.

7.1.3. Evaluation Team members initially assessed each Tender as an individual, assigning each criterion a score from 1 to 10 (as per the rating scale stated in the approved evaluation plan). The TET then met to agree upon a consensus score for each criterion. During the discussions, risks were considered and the scores amended to reflect the discussions.

7.1.4. A summary of the technical assessment findings for each of the tenders is outlined below:

[redacted]

[redacted]

[redacted]

[redacted]

[redacted]

[redacted]

[redacted]

[redacted]

[redacted]

[redacted]

Subject to 3rd Party Consultation

[redacted]

[redacted]

[redacted]

[redacted]

[redacted]

[redacted]

7.1.6. A summary of each Tenderer's weighted technical scores is provided in the following table, which is ranked in descending order (order of merit):

TENDERER	WC1	WC2	WC3	WC4	WC5	TOTAL WEIGHTED TECHNICAL SCORE
Subject to 3rd Party Consultation [redacted]	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]

[redacted]

7.1.7. A detailed summary of each Tender response, against each of the individual assessment criterion is provided at **Schedule 2 - Detailed Summary of Tender Responses.**

7.2. Stage 3B: Regional Contribution and Industrial Relations

7.2.1. The Evaluation Team considered all relevant information provided as part of the Regional Contribution and Industrial Relations assessment criterion.

7.2.2. A summary of the LIPP assessment findings for each of the tenders is outlined below:

[redacted]

[redacted]

[redacted]

[redacted]

[redacted]

[redacted]

[redacted]

[redacted]

[redacted]

[redacted]

[redacted]

[redacted]

[redacted]

[redacted]

[redacted]

[redacted]

[redacted]

Subject to Third Party Consultation [redacted]

[redacted]

[redacted]

[redacted]

[redacted]

[redacted]

[redacted]

[redacted]

[redacted]

[redacted]

7.3. Stage 3C: Interviews, Presentations, Demonstrations, Samples and Prototypes

No interviews, presentations, demonstrations, samples or prototypes were sought or required during the evaluation process.

7.4. Stage 3D: Clarifications

No Tender response clarifications were sought or required during the evaluation process.

7.5. Stage 3E: Shortlisting

Evaluation shortlisting was not specified in the published RFT as an available option after **Stage 3: Technical Assessment** and therefore did not occur.

8. Stage 4: Pricing Assessment

8.1.1. As part of the evaluation process, the Evaluation Team undertook an analysis of pricing submitted by the Tenderers as part of their Tender response.

8.1.2. The Pricing Schedule completed by Tenderers requested a breakdown of cost per the three identified tasks. Each Tender Response was given a rank as provided in the following table, which is shown in ascending order:

TENDERERS	REGULAR STRATEGIC GUIDANCE, COACHING AND MENTORING OF THE CIT CEO	REGULAR COACHING AND MENTORING OF KEY STAFF	PROVIDE BESPOKE WORKSHOPS	TOTAL FIXED FEE
[redacted]	[redacted]	[redacted]	[redacted]	[redacted]
[redacted]	[redacted]	[redacted]	[redacted]	[redacted]
[redacted]	[redacted]	[redacted]	[redacted]	[redacted]
[redacted]	[redacted]	[redacted]	[redacted]	[redacted]
[redacted]	[redacted]	[redacted]	[redacted]	[redacted]
[redacted]	[redacted]	[redacted]	[redacted]	[redacted]
[redacted]	[redacted]	[redacted]	[redacted]	[redacted]
[redacted]	[redacted]	[redacted]	[redacted]	[redacted]
[redacted]	[redacted]	[redacted]	[redacted]	[redacted]
[redacted]	[redacted]	[redacted]	[redacted]	[redacted]
[redacted]	[redacted]	[redacted]	[redacted]	[redacted]
[redacted]	[redacted]	[redacted]	[redacted]	[redacted]
Redrouge				$1,705,000.00
[redacted]	[redacted]	[redacted]	[redacted]	[redacted]

8.1.3. For more information on the different pricing schedules see **Schedule 3 – Pricing Comparison.**

9. Stage 5: Risk Assessment

9.1. Stage 5A: Assessment of Risk

9.1.1. As part of the evaluation process, the Evaluation Team undertook a risk assessment of the various Tenderers to identify risks associated with a Tender response and if required, any mitigating actions that could be applied to the Services to render the bid to an acceptable/low risk.

9.1.2. A summary of risks identified for each Tenderer and the mitigations proposed is provided in the following table:

TENDERER	RISK RATING	SUMMARY OF RISKS IDENTIFIED
[redacted]	[redacted]	
[redacted]	[redacted]	[redacted]
[redacted]	[redacted]	[redacted]
[redacted]	[redacted]	[redacted]
[redacted]	[redacted]	[redacted]
[redacted]	[redacted]	[redacted]
[redacted]	[redacted]	
[redacted]	[redacted]	[redacted]
[redacted]	[redacted]	[redacted]
Redrouge	Low risk	Singular focus on Patrick Hollingworth, what happens if he is unavailable.
[redacted]	[redacted]	[redacted]
[redacted]	[redacted]	[redacted]
[redacted]	[redacted]	[redacted]
[redacted]	[redacted]	

9.2. Stage 5B: Referee Information

No references were sought or required during the evaluation process.

9.3. Stage 5C: Additional Corporate / Financial Information

No corporate and/or financial viability assessments were sought or required during the evaluation process.

9.4. Stage 5D: External Feedback Procedure

No contact was made by UnionsACT, Environmental Protection Agency or the Long Service Leave Board during the evaluation process.

10. Stage 6: Value for Money Assessment

10.1. Stage 6A: Value for Money Analysis

10.1.1. In accordance with the approved Evaluation Plan, members of the Evaluation Team were responsible for performing and determining the Value for Money assessment.

10.1.2. In conducting the Value for Money assessment, the Evaluation Team recognised that the Tender response representing the best Value for Money outcome for CIT might not necessarily be the lowest priced Tender response.

10.1.3. The Evaluation Team held a moderation workshop to discuss and consider all information gathered and documented during the evaluation process, including:

(a) whole of life costs represented in the Pricing Schedules;

(b) technical worth represented by the Weighted Technical Scores;

(c) the level of risk a Tender Response is likely to pose to CIT;

as determined during the **Stage 3: Technical Assessment**, **Stage 4: Pricing Assessment** and **Stage 5: Risk Assessment.**

10.1.4. Based on the Value for Money assessment, the Evaluation Team ranked the Responses as set out in the following table, which is ranked in descending order (order of merit):

TENDERER	TOTAL WEIGHTED TECHNICAL SCORE	PRICE RATING	RISK RATING	VFM RANKING
Redrouge	760	13	Low	1
[redacted]	[redacted]	[redacted]	[redacted]	[redacted]
[redacted]	[redacted]	[redacted]	[redacted]	[redacted]
[redacted]	[redacted]	[redacted]	[redacted]	[redacted]
[redacted]	[redacted]	[redacted]	[redacted]	[redacted]

TENDERER	TOTAL WEIGHTED TECHNICAL SCORE	PRICE RATING	RISK RATING	VFM RANKING
[redacted]	[redacted]	[redacted]	[redacted]	[redacted]
[redacted]	[redacted]	[redacted]	[redacted]	[redacted]
[redacted]	[redacted]	[redacted]	[redacted]	[redacted]
[redacted]	[redacted]	[redacted]	[redacted]	[redacted]
[redacted]	[redacted]	[redacted]	[redacted]	[redacted]
[redacted]	[redacted]	[redacted]	[redacted]	[redacted]
[redacted]	[redacted]	[redacted]	[redacted]	[redacted]
[redacted]	[redacted]	[redacted]	[redacted]	[redacted]
[redacted]	[redacted]	[redacted]	[redacted]	[redacted]

10.2. Stage 6B: Best and Final Offer

Not used.

10.3. Stage 6C: Structured Negotiations

Not used.

11. Stage 7: Evaluation Report

This Evaluation Report has been prepared to:

(a) describe the evaluation process that was undertaken in accordance with the RFT and the approved Evaluation Plan;

(b) detail the outcomes of the Value for Money assessment; and

(c) provide recommendations to the Delegate based on the overall evaluation outcome for consideration and approval.

12. Stage 8: Finalise Selection of the Preferred Tenderer

12.1. Stage 8A: Selection of the Preferred Tenderer and Finalising the Contract

12.1.1. As an outcome of the Value for Money assessment activities, the Evaluation Team determined that the Tender Responses from Redrouge Nominees Pty Ltd as the Trustee for the Patrick Hollingworth Family Trust, ACN 159 204 323/ABN 98 563 981 390 represents the best Value for Money outcome for CIT and should be considered as the preferred Tenderer.

12.1.2. The Evaluation Team assessment was based on the following key factors:

While noting the difference in pricing between the tenderer with the highest weighted technical score Redrouge and that of [redacted] which scored the second highest technical score, the Panel evaluated that the value provided by Redrouge surpassed the price difference and was also reflective in the significant difference in the technical scores.

Redrouge was clearly the submission most relevant to the requirements outlined in the RFT. While the tenderer does have an advantage of being the incumbent the transformations already achieved in CIT has had a very significant impact on the ability of the organisation to adapt and the meet challenges including the 2019 financial and budget outcome and the current COVID-19 crises.

[redacted]

12.1.3. The Evaluation Team confirms that the preferred Tenderers are all compliant with the Workplace Gender Equity Act 2012 and are not listed on the following website: http://www.wgea.gov.au/

12.1.4. Following on from Delegate approval of this Evaluation Report, and if required undertaking Contract negotiations with the preferred Tenderer, the Evaluation Team will finalise the selection of the successful Tenderer.

12.2. Stage 8B: Notification of Unsuccessful Tenderers and Debriefing

On the successful completion of Contract negotiations with the preferred Tenderer and the execution of the Services Agreement, letters will be sent to all/the unsuccessful Tenderers and will include:

(a) appreciation for submitting a response;

(b) regret that they were unsuccessful on this occasion;

(c) advice of public notification on the ACT Government Contracts Register;

(d) an offer to debrief; and

(e) the encouragement to submit offers in the future.

13. Evaluation Team Endorsement

As members of the Evaluation Team for GS002147.110 – Provision of Organisational Transformation Strategic Guidance and Mentoring Services to CIT 2020 to 2021, we confirm that the Tender evaluation process was conducted in accordance with the RFT, the approved Evaluation Plan.

EVALUATION TEAM: ENDORSEMENT	
Evaluation Team	**Signature**
Name: Andrew Whale Title: Executive Director – Corporate Services Date:	Signature: ____________ Evaluation Team Chair
Name: Cheryl Steff Title: Senior Director - HR Date:	Signature: ____________ Evaluation Team Member
Name: Fiona Mitchell Title: Director – Business & Leadership Date:	Signature: ____________ Evaluation Team Member

14. Evaluation Recommendation

The Evaluation Team recommends that you approve:

(1) the selection of Redrouge Nominees Pty Ltd as the Trustee for the Patrick Hollingworth Family Trust, ACN 159 204 323/ABN 98 563 981 390 as the successful Tenderer.

(2) the selection of the above Tenderer as representing the best Value for Money outcome for CIT; and

(3) entering into Contract with the above Tenderer for a term of 20 months, with no option of extension, pending a successful negotiated outcome.

15. Delegate Approval

The Evaluation Team recommendation is Approved / Not Approved and the Evaluation Team is authorised to:

(a) Arrange for CITs Procurement, Contract and Records Manager to prepare a Services Agreement between CIT and the preferred Tenderer, provided the outcomes of the Contract negotiations are successful;

(b) Arrange public announcement (as applicable) following Contract execution; and

(c) Provide a debriefing to unsuccessful Tenderers following Contract execution.

DELEGATE	
Name	Leanne Cover
Position	Chief Executive Officer
Signature	
Date	
Statement	This Evaluation Report is approved.
Comments	

Schedule 1. Approved Evaluation Plan

See document attached separately.

Schedule 2. Detailed Summary of Tender Responses

See document attached separately.

Schedule 3. Pricing Comparison

See document attached separately.

Procurement ACT

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ACT Government

Procurement ACT

GS0002147.110 - RFx Evaluation Plan

Provision of Organisational Transformation Strategy Guidance and Mentoring Services for CIT 2020-2021

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RFx ID	Request for Tender (RFT) – GS0002147.110
RFx Title	RFT, Provision of Organisational Transformation Strategy Guidance and Mentoring Services for CIT 2020-2021-Consultancy
Delegate	Leanne Cover

1. Purpose of the Evaluation Plan

1.1.1. The purpose of this Evaluation Plan is to outline the approach of the Territory officers and/or affiliates involved in the evaluation of Tender responses to a Request for Tender (RFT) – GS0002147.110- Provision of Organisational Transformation Strategy Guidance and Mentoring Services for CIT 2020-2021 (Consultancy) issued by the Canberra Institute of Technology (CIT).

1.1.2. This Evaluation Plan should be read in conjunction with the RFT.

1.1.3. The method of procurement being employed is a Public Tender and the RFT will be advertised on Tenders ACT.

2. Evaluation Timeline

2.1.1. The timeline for the conduct of the RFT evaluation process is described below.

ACTIVITY	DATE
RFx Issue Date	February 2020
RFx Closing Time and Date	March 2020
Evaluation Complete	March/April 2020
Evaluation Report	April 2020
Contract Execution	May 2020
Debrief	May 2020

2.1.2. The timeframes outlined above are estimates only and may change after this Plan is signed by the Delegate.

3. Governance

3.1. Evaluation Plan

3.1.1. This Evaluation Plan details the Evaluation Team and its roles and responsibilities, the evaluation methodology and the Assessment Criteria by which Tenders received will be evaluated.

3.1.2. A principle for any procurement is to ensure that the evaluation of Tenders is conducted with an appropriate level of business involvement, support and governance. The evaluation must satisfy the requirements of the Territory Procurement Framework, inclusive of the *Government Procurement Act 2001,* the *Government Procurement Regulation 2007*, Procurement Standards, Policies, Procedures and Circulars.

3.1.3. This Evaluation Plan documents (in advance of the evaluation of Tenders) an evaluation process that is transparent, ethical, defensible, non-discriminatory, and capable of being audited. To achieve this aim, this Evaluation Plan:

(a) identifies the Delegate, the Evaluation Team and Advisors;

(b) details the roles and responsibilities of the Delegate, the Evaluation Team and Advisors;

(c) details the Assessment Criteria and evaluation methodology; and

(d) outlines evaluation reporting and debrief requirements.

3.2. Delegate Approval Prior to Commencement

3.2.1. The Delegate must approve this Evaluation Plan prior to commencement of the evaluation process.

3.2.2. Any changes to the Evaluation Plan, including membership of the Evaluation Team must be approved in writing by the Delegate.

3.3. Adherence to the Evaluation Plan

3.3.1. In conducting an evaluation process, the Evaluation Team must ensure adherence to and compliance with this Evaluation Plan and ensure that the evaluation of Tender responses is against the evaluation methodology and Assessment Criteria outlined in this Plan.

3.3.2. Where there is a discrepancy between information contained in the Evaluation Plan and the RFT, the RFT will take precedence, as it was the last form of communication with potential Tenderers.

3.4. Authority to Enter into Agreement

3.4.1. The Delegate is the authority to enter into an Agreement.

3.4.2. The Delegate will:

(a) consider the Evaluation Report, including the recommendations as to which Tenderers represent best Value for Money;

(b) approve the preferred Tenderers to be invited to enter into Contract negotiations; and

(c) authorise the execution of a Contract with the successful Tenderer(s) or terminate the RFT process.

3.5. Record Keeping

The Territory must have access to documents that demonstrate the Evaluation Team assessment considerations and decisions. The Evaluation Plan is an important artefact in this process.

4. Evaluation Team

4.1. Purpose of an Evaluation Team

4.1.1. The Evaluation Team will be responsible for the oversight and operation of the evaluation process, including the technical assessment, pricing assessment, risk assessment and Value for Money assessment of Tender responses.

4.1.2. The Evaluation Team will recommend to the Delegate on:

(a) excluding any Tenderer during the evaluation process;

(b) which Tenderers is/are assessed as representing best Value for Money;

(c) the short-list of Tenderers to be invited into Contract negotiations; and

(d) the final Value for Money comparative assessment and whether to execute a Contract with the successful Tenderer(s) or to terminate the RFT process.

4.2. Evaluation Team Membership

The Evaluation Team comprises the following members:

EVALUATION TEAM MEMBERSHIP	
Role	**Name**
Evaluation Team Chair	Andrew Whale
Member	Cheryl Steff
Member	Fiona Mitchell
Advisors	
Evaluation Team Facilitator (Procurement Officer – Procurement ACT)	Carla Udvardi
Procurement and Contracts Manager (CIT)	Ilze Kemp

4.3. Preparation

4.3.1. All members of the Evaluation Team will be briefed on their responsibilities, including the need to demonstrate impartiality and equity to all Tenderers by either the Probity Advisor (if engaged) or the Evaluation Team Facilitator.

4.3.2. In order to ensure a confident and well-prepared approach to the evaluation, the Evaluation Team and other officers and affiliates involved in the evaluation must, as a minimum:

(a) read and understand the RFT;

(b) understand the relationship between the Assessment Criteria and the response requirements in the RFT;

(c) understand their roles and responsibilities as outlined in this Evaluation Plan; and

(d) understand and conform only to the evaluation processes outlined in this Evaluation Plan.

5. Roles and Responsibilities

5.1. Delegate

5.1.1. The Delegate is responsible for approving the purchasing decision of the Evaluation Team.

5.1.2. Before exercising his/her delegation or authorisation the Delegate must be satisfied that the requirements set out in this Evaluation Plan have been met with due care and diligence. The Delegate must be provided with advice from the Evaluation Team as the Delegate reasonably requires to support his/her decision.

5.2. Evaluation Team Chair

5.2.1. The Evaluation Team Chair is responsible for:

(a) ensuring the evaluation process is conducted in accordance with this Evaluation Plan and otherwise in an objective, fair and ethical manner;

(b) ensuring that the Evaluation Team maintains the highest standards of probity and official conduct;

(c) chairing all meetings of the Evaluation Team;

(d) leading the evaluation process including:

i. that participation by Evaluation Team members is equitable to benefit from the skills each member brings to the group;

ii. determining whether any Tender responses are to be set aside or excluded from further participation or consideration;

iii. determining whether any Tender responses are to be not considered further at any time during the evaluation because the Tender response has not achieved a satisfactory standard in any of the Assessment Criteria, including any of the technical sub-criteria;

iv. approving any correspondence from the Evaluation Team to Tenderers prior to it being provided to the nominated ET Facilitator for transmission to the Tenderer;

v. reviewing any Tender responses to such correspondence prior to it being released to the Evaluation Team;

vi. liaising with / seeking advice where necessary from Technical and/or Specialist Advisors (including defining and monitoring response times) on matters relevant to evaluation deliberations;

vii. contacting referees (if required);

viii. overseeing the preparation of the Evaluation Report and approving the Evaluation Report for submission to the Delegate;

ix. submit the finalised Evaluation Report to the approving Delegate; and

x. overseeing Tenderer debriefs.

5.3. Evaluation Team

5.3.1. An Evaluation Team has been established to evaluate Tender responses up to the point where the Delegate makes a decision in relation to the next Stages in the evaluation process. Evaluation Team members are personally appointed and will not be withdrawn or replaced without Delegate approval.

5.3.2. The role of the Evaluation Team, once established, is to:

(a) evaluate the Tender responses;

(b) decide what further investigations are appropriate and supervise those investigations;

(c) seek advice as required;

(d) contribute information to debrief the unsuccessful Tenderers; and

(e) prepare an Evaluation Report and any related reports recommending a preferred Tenderer(s) based on an evaluation conducted in accordance with the RFT and this Evaluation Plan.

5.3.3. Evaluation Team members including the Evaluation Team Facilitator are responsible for:

(a) complying, and ensure compliance with the Territory Procurement Framework, inclusive of the *Government Procurement Act 2001,* the *Government Procurement Regulation 2007*, Procurement Standards, Policies, Procedures and Circulars;

(b) adhering to probity principles;

(c) maintaining confidentiality and report any conflicts of interest that arise;

(d) reading and understanding the published RFT (including any addenda and the Standard Conditions of Tender);

(e) understanding the relationship between the Assessment Criteria and CIT's requirements;

(f) conducting the detailed evaluation in accordance with the Assessment Criteria and approved evaluation methodology set out in this Evaluation Plan;

(g) identifying and assess risks associated with Tenders and the procurement process;

(h) determining risk management strategies for the risks identified for the preferred Tenderer;

(i) identifying if additional information is required from Tenderers;

(j) undertaking and documenting any further investigations of Tenderers;

(k) participating in any presentations by Tenderers if necessary;

(l) confirming previous experience of Tenderers by contacting referees if necessary;

(m) arranging corporate viability / financial viability checks if necessary;

(n) seeking specialist, probity and/or legal advice if necessary;

(o) documenting the evaluation process;

(p) participating in Evaluation Team member discussions and review the Evaluation Report for Delegate consideration / approval;

(q) ensuring that findings are based on the information supplied as part of the Tender process and ensure findings are not unduly influenced by any factor external to the Tender process;

(r) seeking Delegate approval to negotiate with, and engage, the preferred Tenderer identified through evaluation process;

(s) participating in negotiations with the preferred Tenderer if necessary; and

(t) debriefing unsuccessful Tenderers upon request.

5.4. Evaluation Team Facilitator

5.4.1. Procurement ACT will provide a dedicated procurement officer that is appointed as the Evaluation Team Facilitator, as well an interim officer who supports the Evaluation Team Facilitator (e.g. is a backup).

5.4.2. The Evaluation Team Facilitator (and interim officer, as required) is responsible for:

(a) conduct compliance checks;

(b) providing advice on whether any Tenders have compliance issues and should be considered to be set aside or excluded from further participation or consideration in the tender process;

(c) advising the Evaluation Team to ensure the evaluation process is:

i. conducted in an objective, fair and ethical manner; and

ii. is compliant with the Evaluation Plan;

(d) ensuring the Evaluation Team have read this Evaluation Plan and agree to evaluate Tender responses in accordance with the Evaluation Plan;

(e) ensuring the Evaluation Team have complied with the requirements set out in the Procurement ACT Probity Standard and Probity Instructions throughout the course of the evaluation process;

(f) advise the Evaluation Team on the:

i. need for Tenderers to be provided with extra information during the procurement period; and/or

ii. need for an extension to the Closing Time and Date; and/or

iii. the possibility of collusion between Tenderers;

(g) be responsible for the collection of Tenders;

(h) facilitate evaluation sessions;

(i) preparing and vetting correspondence with Tenderers for transmission;

(j) managing (including dispatch) correspondence to Tenderers (as per Evaluation Team Chair's instruction), including clarification questions;

(k) assess and manage any identified risks that relate to the procurement process;

(l) on behalf of the Evaluation Team, request attendance/seek advice of invited Technical and/or Specialist Advisors on matters relevant to the evaluation and Evaluation Team;

(m) where appropriate, invite attendance by or consult with other authorities on matters relevant to Evaluation Team deliberations;

(n) where pertinent, ensure all Evaluation Team members and any Technical and/or Specialist Advisors have signed a Confidentiality and Conflict of Interest Declaration prior to undertaking their tasks;

(o) ensure that actions and procedures are instituted to support appropriate standards of probity and official conduct;

(p) ensure that all Evaluation Team members are given opportunities to express opinions and are in agreement with the findings (any dissenting view should be recorded);

(q) chair any meetings with Tenderers and be responsible for accurately recording notes of the meetings;

(r) in consultation with the Evaluation Team Chair, lead and drive the evaluation process and oversee the preparation and submission of the draft Evaluation Report to the Evaluation Team Chair for circulation and agreement with the Team members;

(s) if required, assist with Contract negotiations; and

(t) assist in the debriefing of unsuccessful Tenderers.

5.5. Probity Advisor

5.5.1. A Probity Advisor will be engaged where specific probity issues arise during the evaluation.

5.5.2. If necessary, drafting of a Probity Statement or a Probity Plan specific to the project may be required to be prepared by ACTGS. The appointment of a designated Probity Advisor may also be required.

5.5.3. These Services must be requested via a formal 'Request for Legal Advice' form, which must be cleared by a relevant team Senior-Director.

5.5.4. If a Probity Advisor is engaged, a probity briefing will be conducted by the Probity Advisor for all Evaluation Team members prior to the commencement of the evaluation process.

5.5.5. The Probity Advisor must provide advice to the Evaluation Team on probity matters to assist the Evaluation Team in ensuring that all Tender responses are evaluated fairly, uniformly and transparently. The Probity Advisor must also be available for the Tenderers to raise concerns they may have regarding fairness throughout the evaluation process. The Probity Advisor will report to the Evaluation Team Chair.

5.5.6. The Probity Advisor will also assist the Evaluation Team in relation to legal and regulatory matters and assist the Evaluation Team in ensuring that the legal aspects of all Tender responses are analysed uniformly, objectively and transparently. The Probity Advisor must provide, when and as required, any additional knowledge, experience or skills to facilitate the Evaluation Team's capability and functional assessments.

5.6. Technical/Specialist Advisors

5.6.1. It is the role of the Technical or Specialist Advisors to provide, when called upon, additional knowledge, experience or skills to facilitate the Evaluation Team's assessments.

5.6.2. Technical or Specialist Advisors must not participate in, nor contribute to the assessment of or comparison between any Tender response's relative merits.

5.6.3. Any Technical or Specialist Advisor must agree to abide to any confidentiality and conflict of interest requirements.

5.6.4. The Technical and/or Specialist Advisors must not themselves engage in the provision of scoring or assessment ratings. The Technical and/or Specialist Advisors may, if requested by the Evaluation Team, analyse Tenders and prepare factual reports against one or more of the Assessment Criteria for the Evaluation Team’s consideration.

5.6.5. The areas of expertise may include but not be limited to:

(a) technical analysis/information;

(b) financial analysis;

(c) procurement;

(d) administrative functions;

(e) Local Industry Participation;

(f) Labour Relations Training and Workplace Equity Plans;

(g) technical procurement advice, Procurement ACT Directors/Managers (such advice may include, but not be limited to, technical drafting advice and review of draft evaluation reports for clarity and consistency with the *Government Procurement Act 2001* and the RFT);

(h) legal and legal process (probity) issues, including advice from the ACT Government Solicitor; and

(i) Work Health and Safety.

5.7. Additional Advisors

5.7.1. From time to time, the Evaluation Team may call upon any Territory officer and/or affiliate elsewhere in the ACT Government or from any advisory organisations for additional specialist support to provide additional technical/specialist knowledge, experience or skills to facilitate the Evaluation Team's assessments.

5.7.2. The Evaluation Team, through the Evaluation Team Chair, may request additional Technical and/or Specialist Advisors to provide input and/or feedback with regard to technical aspects of Tender responses for Evaluation Team consideration. The Evaluation Team remains responsible for conducting the evaluation.

5.7.3. The Evaluation Team Chair will decide whether such additional support is needed and, if required, will arrange for it be provided. The Evaluation Team Chair will also define the timeframe within which information is to be provided.

6. Guiding Principles

6.1. Process

6.1.1. CIT officers and/or affiliates involved in a procurement process must adhere to the Procurement ACT - Procurement Standard, Procurement ACT - Probity Standard, the G&S Procurement Procedures.

6.1.2. The evaluation must be conducted in a systematic way using a structured process to identify the procurement options, which:

(a) best satisfy the requirements specified in the RFT; and

(b) accord with the Territory Procurement Framework, inclusive of the *Government Procurement Act 2001,* the *Government Procurement Regulation 2007*, Procurement Standards, Policies, Procedures and Circulars.

6.2. Evaluation Protocols

6.2.1. **Clause 6.2 – Evaluation Protocols** and **clause 6.3 – Conflict of Interest** do not limit the *Procurement ACT - Probity Standard* or the individual Probity Plan for this procurement (if any).

6.2.2. CIT officers and/or affiliates undertaking procurements are required to act ethically throughout the procurement. Ethical behaviour relates to honesty, integrity, probity, diligence, fairness and consistency. Ethical behaviour identifies and manages conflicts of interests and does not make improper use of an individual's position. Tenderers are entitled to have their Tenders assessed ethically and fairly and for this to be seen to have been done.

6.2.3. Therefore, all involved in the Tender process, in particular those involved in the evaluation, must:

(a) recognise and deal with actual, potential and perceived conflicts of interest;

(b) deal with Tenderers equitably, including by:

i. assessing all conforming Tenders against all Assessment Criteria;

ii. issuing information relevant to all Tenderers concurrently to all Tenderers;

iii. not taking into account in the evaluation matters that were not provided for in the RFT;

(c) seek appropriate internal or external advice where probity issues arise;

(d) not accept inappropriate gifts or hospitality;

(e) carefully consider the use of CIT resources; and

(f) be aware of and comply with applicable CIT policies and procedures.

6.2.4. All Tenders, evaluation documentation and proceedings will be treated as 'Unclassified, Sensitive' and are subject to a high level of protection. When not being used in the evaluation process, hard copy documents comprising of any document related to an evaluation must be retained in a locked secure room or cabinet. Soft copy/electronic documents must be retained on secure Territory drives accessible only to the Evaluation Team Chair, Evaluation Team Members, Advisors and Procurement ACT (as required).

6.2.5. All discussions associated with the evaluation of any Tender response documentation, process or report, including the Evaluation Team proceedings will be conducted on a 'need-to-know' basis. Discussions must not take place with persons other than those serving on the Evaluation Team or other designated Advisory authorities. Any request for information regarding the Tender responses or the evaluation must be directed to the Evaluation Team Chair. On completion of the evaluation, all Tender response information must be either returned to the Evaluation Team Chair or destroyed in a secure manner.

6.2.6. By signing this Evaluation Plan, each Evaluation Team member must agree to:

(a) not accept any additional information from a Tenderer unless a formal request has been made by the Evaluation Team Chair for additional information to be provided as part of the evaluation process, and such a request has been recorded;

(b) keep all evaluation and Tender documentation secured at all times; and

(c) Not disclose any information relating to the evaluation.

6.3. Conflict of Interest

6.3.1. CIT requires Evaluation Team members, all Advisors and officers handling Tender documents to disclose any actual or apparent conflict of interest and take steps to avoid that conflict as outlined in the Probity and Ethical Behaviour Circular (PC21). The responsibility lies with each Evaluation Team member to promptly identify and disclose to the Evaluation Team Chair, Evaluation Team Facilitator or Delegate (as the case may be) any actual, perceived or potential conflicts of interest involving themselves, their immediate family or any other relevant relationship.

6.3.2. All disclosures of a conflicts of interest will be fully documented. Evaluation Team members, all Advisors and officers handling Tender documents must provide written acknowledgement of confidentiality and declaration of conflicts of interest prior receiving Tender responses and the commencement of the evaluation process by completing a Deed of Confidentiality and Conflict of Interest.

6.3.3. Continued Evaluation Team membership will be dependent on the determination of the declared conflicts of interest. If an Evaluation Team member's conflict of interest is identified as material, depending on the severity:

(a) the conflict may be managed by removing the Evaluation Team member 's involvement in the evaluation of material related to the conflict; and/or

(b) the Evaluation Team member may be removed from any involvement in the evaluation process and replaced with a Delegate approved officer.

6.3.4. In the event of a conflict of interest becoming apparent once the evaluation process has commenced, the Evaluation Team member must immediately advise the Evaluation Team Chair and await further instruction on the conflict-of-interest status and any management measures.

6.4. Communication

6.4.1. Any request by Tenderers for information regarding their Tender response and the evaluation process and outcomes will be addressed to the Territory Contact Officer and handled by the Evaluation Team Chair.

6.4.2. The Territory Contact Officer named in the RFT is:

Territory Contact Officer	Carla Udvardi
Email	Carla.udvardi@act.gov.au

6.4.3. Once receipted by the Territory Contact Officer, all communication with Tenderers must be formally controlled and recorded for auditing purposes.

6.4.4. Any information provided to one Tenderer must be made available to the other Tenderers on a non-attributable basis. In addition, all RFT alterations, corrections and notices should be made available to all Tenderers.

6.4.5. Additional information or clarification, e.g. contact information, may be sought from Tenderers where the information does not materially impact on the compliance or competitiveness of the Tender response. This should be sought by the Evaluation Team Facilitator.

6.4.6. Only the Evaluation Team Chair will give approval for communications with any person(s) or organisation(s) outside the Evaluation Team.

6.4.7. The undertaking of formal interviews, presentations, demonstrations, obtaining references etc, will only be conducted with prior approval of the Evaluation Team Chair. A minimum of two Evaluation Team members must be present at these sessions.

6.5. Confidentiality

6.5.1. Tender responses must be treated as confidential. The evaluation process and any Tender responses must not be discussed in public locations or with any person who is not part of the evaluation process. Any disclosure of information relating to the evaluation process to parties outside those involved with the evaluation should be undertaken on a 'need to know basis'.

6.5.2. Tender responses and associated documentation must be treated as Commercial in Confidence and retained in files marked or electronically controlled as "Commercial in Confidence" in accordance with CIT's record keeping policies. Tender responses must be kept in secure folders and if physical - not left unattended. Only officers and affiliates involved with the evaluation process should access the files. Particular care must be taken with information relating to any Tender response's content including pricing and financial viability information.

7. Evaluation - Overview

7.1. Process Overview

7.1.1. The evaluation process must be undertaken in the sequential Stages outlined below, with the exception of referee information procedures and financial information procedures, which can be undertaken at any Stage prior to the completion of Stage 5: Risk Assessment.

7.1.2. The evaluation process will be divided into the following stages and parts:

Stage 1: Receipt and Registration of Tender Responses

Stage 1A: Lodgement

Stage 1B: Late Tenders

Stage 2: Compliance Assessment

Stage 2A: General Compliance

Stage 2B: Threshold Assessment Criteria (if applicable)

Stage 2C: Incomplete Tender Responses

Stage 2D: Redaction and Removal of Pricing Information (if applicable)

Stage 3: Technical Assessment

Stage 3A: Technical Evaluation

Stage 3B: Regional Commitment and Industry Participation (if applicable)

Part 1: Local Industry Participation Policy (if applicable)

Part 2: Secure Local Jobs Code (if applicable)

Stage 3C: Interviews, Presentation, Demonstrations, Samples, Prototypes (if required)

Stage 3D: Clarifications (if required)

Stage 3E: Shortlisting (if required)

Stage 4: Price Assessment

Stage 5: Risk Assessment

Stage 5A: Assessment of Risk

Stage 5B: Referee Information (if required)

Stage 5C: Additional Corporate / Financial Information (if required)

Stage 5D: External Feedback Procedures (if required)

<u>Stage 6</u>: Value for Money Assessment

Stage 6A: Value for Money Assessment

Stage 6B: Best and Final Offer (BAFO) (if required)

Stage 6C: Structured Negotiations (if required)

<u>Stage 7</u>: Evaluation Report

<u>Stage 8</u>: Finalise Selection of Successful Tenderer

Stage 8A: Selection of Successful Tenderer and Finalising the Contract

Stage 8B: Notification of the Successful Tenderer

Stage 8C: Notification of Unsuccessful Tenderers and Debriefing

7.1.3. Tenderers may be short listed at any time during the evaluation.

7.1.4. An Evaluation Risk Register should be created for the evaluation process clearly showing risks that are identified for each/any of the Tenderers. The risks recorded in an Evaluation Risk Register (identified in Stages 1, 2, 3 and 4 of the evaluation) will be assessed and finalised in the Stage: Risk Assessment.

7.2. Evaluation Methodology

7.2.1. Prior to commencing the evaluation process, all Evaluation Team members and Advisors involved in the evaluation must be fully prepared, including as a minimum, they must:

(a) complete declarations of confidentiality and conflict of interest;

(b) read and understand the RFT, Standard Conditions of Tender and all addenda;

(c) understand the relationship between the Assessment Criteria, the Consultancy and CIT's requirements / operations; and

(d) understand (as relevant to them) the evaluation processes outlined in this Evaluation Plan.

7.2.2. In addition, the Evaluation Team and Advisors involved in the evaluation process, must be fully aware of, and comply with, all requirements of the Territory's procurement, probity and financial policies.

7.3. Standard Procedure

The following Standard Procedures will apply to the evaluation of this Tender:

(a) an evaluation workbook will be provided by the Evaluation Team Facilitator to the Evaluation Team;

(b) evaluation of Tender responses may be recorded using the evaluation workbook;

(c) the Evaluation Team will be permitted access to all technical information;

(d) the Evaluation Team will not be permitted access to pricing information until the Stage 3: Technical Assessment is complete;

(e) each member of the Evaluation Team must evaluate each Tender response individually; and

(f) once all individual revises/assessments of Tenders have been completed by each Evaluation Team member, the Evaluation Team will convene and facilitate a group discussion. The objective of this discussion is to agree a single (Consensus) score for each Tender response in the evaluation, supported by reasons for the score.

7.4. Scoring

7.4.1. Prior to the group Evaluation Team meeting, each member of the Evaluation Team must individually review and score each Tender response against the Assessment Criteria as outlined in **clause 8**. Assignment of half scores should be avoided.

7.4.2. Each member of the Evaluation Team must also individually record the reasons for the scores they have assigned against each of the Assessment Criteria including the details of any strengths, weaknesses, opportunities and risks identified.

7.4.3. The **Schedule 1 – Scoring Scale** provides sufficient detail to assist Evaluation Team members with remaining objective in applying scoring for technical criteria. The descriptions in the definition column are intended to act only as guidance on assessing ratings. They are not intended to be wholly exclusive of the issues to be taken into account, nor should they be applied literally.

7.4.4. The Evaluation Team may meet to discuss scores with particular reference to any major score differences in the assessment made by individual Evaluation Team members. A summary of the group assessment must be recorded and is to include the details of any revised risks identified during evaluation discussions. Broad consensus, but not necessarily unanimity, should to the extent possible be achieved within the Evaluation Team scoring.

7.4.5. The Evaluation Team may moderate their scores having regard to reasons/ arguments presented by other Evaluation Team members.

7.4.6. Following discussion and moderation of scores by the Evaluation Team members, the agreed Consensus score provides the overall score for each criterion, for each Tender response. Each of these scores are multiplied by the (pre-assigned) applicable weighting factor and the results aggregated to arrive at a total numerical rating (out of 1000) of technical worth for each Tender.

7.4.7. The Evaluation Team Facilitator may combine Tender responses to both weighted and unweighted criteria and the data/information contained in a combined Evaluation Workbook for the Evaluation Team to conduct the Stage 5: Risk Assessment and Stage 6: Value for Money Assessment.

7.5. Averaging Scores

Evaluation scores should not be averaged in order to arrive at a final decision. Final scores should be arrived at by group agreement. Judgement must be applied in reaching the final scoring. Where consensus among Evaluation Team members cannot be reached, the Evaluation Team Chair will make a determination.

7.6. Dissenting View

7.6.1. In conducting the evaluation, consensus of all Evaluation Team members should be sought, to the fullest extent possible.

7.6.2. If any Evaluation Team member does not agree with the majority consensus score(s), report and recommendation, that member's dissenting scores and/or views, together with the reasons for it, must be provided as a separate Dissenting Report (prepared by the dissenting member). This Dissenting Report will be prepared within a timeframe agreed by the Evaluation Team Chair and attached to the Evaluation Report.

8. Assessment Criteria

8.1. Criteria

8.1.1. The Assessment Criteria and any weightings must be identical to those published in the RFT.

8.1.2. As per **clause 3.3.2**, if by chance there is a discrepancy between the published Assessment Criteria in the RFT and the approved Evaluation Plan, the RFT will take precedence, as it was the last form of communication with potential Tenderers.

8.1.3. Assessment Criteria, where appropriate, may be broken into Sub-Criteria for the purposes of focussing the evaluation.

8.1.4. Sub-Criteria, where appropriate, may be further broken down into a number of Evaluation Elements, which correspond to the specific response requirements to be provided by Tenderers in accordance with the RFT **Attachment C - Response Schedules**.

8.2. Weightings

8.2.1. The weighting of any Assessment Criteria (which must total 100) is the decision of the Delegate of the RFT, as this may be published with the release of the RFT.

8.2.2. If Sub-Criteria and Evaluation Elements are used:

(a) Sub-Criteria weightings must add to 100% of the Criterion;

(b) Evaluation Elements weightings must add to 100% of the Sub-Criterion.

8.3. Threshold Assessment Criteria

Not applicable.

8.4. Weighted Technical Assessment Criteria

8.4.1. Tender responses will be assessed against the following Weighted Technical Assessment Criteria:

<table>
<tr><th>NO.</th><th>WEIGHTED ASSESSMENT CRITERIA</th><th>WEIGHTING</th></tr>
<tr><td>WC1</td><td>Experience, Capability and Capacity

Tenderers must provide information demonstrating their past performance and experience in the provision of similar Services.
Tenders must provide the following detail:
a) name of organisation for whom the Services were provided;
b) when the Services were provided as well as the period over which the Services were provided; and
c) an outline of the outcomes achieved.</td><td>25%</td></tr>
<tr><td>WC2</td><td>Understanding of the CIT Strategic Compass 2020 and ability to develop high quality Services relevant to CIT

Tenderers are required to provide information to demonstrate their understanding of CITs Strategic Compass 2020 – Evolving Together and any VET or Institute specific legislation and policies that may be incorporated in the provision of the Services detailed in the Statement of Requirements.</td><td>25%</td></tr>
<tr><td>WC3</td><td>Methodology

Tenderers are required to provide a program approach demonstrating how the Services will be delivered within the timeframes set out in the Statement of Requirements.</td><td>20%</td></tr>
<tr><td>WC4</td><td>Qualifications, Organisational Structure and Suitability of Specified Personnel

Tenderers are required to provide details of:

a) their organisational structure and location of operations;
b) any professional bodies to which the Tenderer and specified personnel are accountable to;
c) the skills and experience of specified personnel including at a minimum, a Curriculum Vitae (CV) with the following evidence:
i) name;
ii) position/level;
iii) specific area/s of subject matter expertise;
iv) qualifications including certificates/registration;
v) number of years' experience; and
vi) brief description of key projects undertaken/completed.</td><td>20%</td></tr>
</table>

WC 5	**Regional Contribution and Industrial Relations** **A. Local Industry Participation Policy** The Canberra Institute of Technology will assess the extent to which the Tenderer has demonstrated that it will ensure capable local businesses are given full, fair and reasonable opportunity to participate in the provision of the Consultancy during the term of the proposed Contract. Tenderers must prepare and submit an Economic Contribution Test (ECT) by completing the relevant Attachment (RFT Attachment D-CBR-Region-ECT ($200k-$5m))	**10%**

8.5. Non-Weighted Assessment Criteria

Tender responses will be assessed against the following Non-Weighted Assessment Criteria:

NO.	NON-WEIGHTED ASSESSMENT CRITERIA
NWC 1	**Price** Tenderers are required to complete the Returnable Pricing Schedule. All pricing breakdown categories within the Schedule should be populated. The Tenderer must provide a fixed fee for the eight (8) month contract period and a fixed fee for the optional 12-month extension. Prices are to be in Australian Dollars and GST inclusive.

9. Evaluation - Process

9.1. Stage 1: Receipt and Registration of Tender Responses

STAGE 1A: LODGEMENT

9.1.1. Tender responses must be lodged electronically via the Territory's electronic tendering system, Tenders ACT at: https://tenders.act.gov.au before the Closing Time and Date outlined at clause **2 - Evaluation Timeline.**

9.1.2. The electronic Tender Box management and registration of Tenderers will be undertaken by the Tenders ACT team in accordance with the Territory's electronic Tender Box protocols.

9.1.3. For any Tender response submitted electronically, the time displayed on Tenders ACT is deemed to be the correct time and will be the means by which CIT will determine that Tender responses have been lodged by the Closing Time and Date.

STAGE 1B: LATE TENDERS

9.1.4. Tender responses will be electronically lodged via the Tenders ACT website, which cannot accept Tender responses past the specified Closing Time and Date.

9.1.5. Any attempt to lodge a Tender response after the Closing Time and Date will not be permitted by the Tenders ACT system.

9.1.6. In very limited circumstances, arrangements may be made for lodgement of a Tender response to occur past the specified Closing Time and Date, if technical problems have been encountered. Tenderers wishing to submit a Late Tender are required to contact Tenders ACT in writing. Endorsement from the Evaluation Team Chair will be sought to open a Late Tender Box. In the event that a late lodgement is to be granted, a Tenders ACT team member will create a new Late Tender Box for the submission of the Late Tender.

9.1.7. Any Tender response lodged after the Closing Time and Date (Late Tender) will be opened and registered by Procurement ACT.

9.1.8. Late Tenders may be evaluated at the absolute discretion of CIT. In deciding whether to admit a Late Tender for evaluation, the Evaluation Team may take into account any factors it considers relevant, including (without limitation):

(a) whether the Tenderer is likely to have had an opportunity to obtain some unfair advantage from late submission;

(b) how late the Tender response is, the reasons given for lateness and evidence available;

(c) whether the Tender response was mishandled by the Territory; and

(d) any evidence of unfair practices.

STAGE 2A: GENERAL COMPLIANCE

9.1.9. Tender responses will be assessed for formal compliance with the RFT requirements.

9.1.10. Any Tender response that does not comply with the RFT requirements (including the Statement of Requirements) or is incomplete may be deemed to be non-compliant.

9.1.11. Where a Tender response is non-compliant, CIT may at its absolute discretion:

(a) reject the Tender response and not consider it any further; or

(b) if possible, without impacting on the probity of the RFT process, allow the Tenderer to correct the non-compliance in the form of a request for clarification; or

(c) admit Late Tenders and/or incomplete Tender responses to be evaluated (**clause 9.1** – Stage 1: Receipt and Registration Tender Responses).

9.1.12. Assessment for formal compliance will include the following factors:

(a) receipt of Tender responses prior to the Closing Time and Date;

(b) submission of a completed **RFT Attachment C, Schedule 10** - Tenderer's Declaration by Tenderer;

(c) submission of a completed **RFT Attachment C, Schedule 11** - Ethical Supplier's Declaration (if applicable);

(d) check against ASIC public records to confirm Tenderer details on submitted declarations;

(e) attendance at the mandatory site inspection or briefing (if applicable);

(f) any other relevant Threshold Assessment Criteria, licences or certificates set out in the RFT;

(g) compliance with the relevant requirements of the *Workplace Gender Equality Act 2012* (Cth) (see http://www.wgea.gov.au/);

(h) completed **RFT Attachment C, Schedule 3** - Response to Assessment Criteria;

(i) completed **RFT Attachment C, Schedule 4** - Referees (if required);

(j) completed **RFT Attachment D, LIPP**;

(k) completed **RFT Attachment E - Pricing Tables**; and

(l) review of conflict of interest disclosures.

9.1.13. A Tender response that is:

(a) at variance with, does not respond to or does not fully comply with any RFT requirements; or

(b) unable to meet insurance requirements; or

(c) contains erasures or is illegible;

may be deemed to be non-conforming.

9.1.14. Details regarding each Tenderer's conformance or non-conformance will be documented.

9.1.15. Non-conformance will be duly considered by the Evaluation Team with a decision made to either include or exclude a Tender response from consideration in further Stages of the evaluation. All reasons for excluding a Tender response from the full evaluation process will be clearly substantiated/documented by the Evaluation Team in the Evaluation Report for Delegate consideration/approval.

9.1.16. The Evaluation Team may determine during the Stage 3: Technical Assessment process that a Tender response falls within one of the categories listed in **clause 9.2**, and the Evaluation Team Chair has the ability to assess a Tender response as non-compliant against **clause 9.2**.

9.1.17. Any Response that fails to comply with **clause 9.2** may be excluded from further participation in the evaluation process and will not go on to be included in Stage 3: Technical Assessment. The Tender response will be recorded in the Evaluation Report as "Non-compliant, requirements not met".

9.1.18. The Evaluation Team will approve the setting aside of any Tender responses that do not meet the Stage 2: Compliance Assessment.

9.1.19. All Tender responses that meet the Stage 2: Compliance Assessment requirements will proceed to Stage 3: Technical Assessment.

STAGE 2B: THRESHOLD ASSESSMENT CRITERIA

9.1.20. Any requirements considered as essential/mandatory by CIT must be clearly identified as such in the Statement of Requirements (SOR) of the RFT. Where this has occurred, all Tender responses must be reviewed to ensure compliance.

9.1.21. Threshold Assessment Criteria are only to be included if the information provided with a Tender response can be assessed as a "YES or NO". A "YES" will result in the Tenderer progressing to subsequent assessment Stage 3: Technical Assessment, and a "NO" will require a Tenderer to be excluded from further consideration.

9.1.22. The Evaluation Team must exclude Tender responses from further consideration, which have not complied with any Threshold Assessment Criteria identified as such in the SOR of the RFT.

9.1.23. The Evaluation Team will assess whether a Tender response meets the Threshold Assessment Criteria. Tender responses rating a "NO" against any Threshold Criterion are to be deemed non-conforming. The Tender response will be recorded in the Evaluation Report as "Non-compliant, requirements not met".

STAGE 2C: INCOMPLETE RESPONSES

9.1.24. Tender responses that are incomplete or clearly non-competitive may be excluded from consideration at any time during the evaluation process. The Evaluation Team may, however, still consider these Tender responses and seek clarification if it believes that this is appropriate.

9.1.25. Any Evaluation Team decision to exclude incomplete or non-competitive Tender responses should be noted by the Evaluation Team Facilitator and referred to the Probity Advisor if required. The Tender response will be recorded in the Evaluation Report as "Non-compliant, requirements not met".

STAGE 2D: REDACTION AND REMOVAL OF PRICING INFORMATION

9.1.26. The Evaluation Team Facilitator will be responsible for reviewing the Tender Responses to identify pricing or pricing related information contained outside of the RFT Pricing Tables.

9.1.27. The Evaluation Team Facilitator will be responsible for either redacting or removing pricing and pricing related information from both the hard and soft copies initially made available to the Evaluation Team members.

9.1.28. Pricing information will only be made available to the Evaluation Team in Stage 6: Value for Money Assessment.

9.2. Stage 3: Technical Assessment

STAGE 3A: TECHNICAL EVALUATION

9.2.1. Stage 3A of the evaluation will identify those Tenderers that are assessed as being able to meet the RFT requirements, in doing so the Evaluation Team must consider all relevant information for each criterion provided in each Tender response and conduct an objective analysis against the Assessment Criteria. In addition, the Evaluation Team may use material tendered in response to one evaluation criterion in the evaluation of another criteria.

9.2.2. All conforming Tender responses will be evaluated as follows.

(a) Individual Evaluation Team members will undertake an initial assessment of all Weighted Assessment Criteria and give a score (out of 10) using the **Schedule 1 - Scoring Scale**. The Evaluation Team should consider all relevant material/information tendered in a response when evaluating each weighted criterion. The descriptions in the "Response" column are intended to act as guidance only on assigning ratings.

(b) Evaluation Team members may use assessment worksheets for each Tender response and must record the scores and the reason for the assigned rating (out of 10) they have awarded against each Weighted Criterion. The worksheets may be utilised in the consensus evaluation session/s discussions and provide support information for the preparation of the Evaluation Report.

(c) The Evaluation Team will discuss and consider the scores and associated comments allocated by the individual Evaluation Team members to reach a consensus score for all Weighted Assessment Criteria.

(d) All Weighted Assessment Criteria consensus scores will then be multiplied by their respective weighting with the resulting figures tallied to give a total score out of a possible 1,000 for each Tender response per category (this is referred to as the Total Weighted Score).

9.2.3. The Evaluation Team Facilitator will work with the relevant Evaluation Team members to review submissions and scores to ensure the Evaluation Team has a common understanding of each Tenderer's offering. Any differences in scores between Evaluation Team members will be reviewed. On instruction from the Evaluation Team Chair, the Facilitator may seek clarifications from the Tenderers to enable the Evaluation Team members to arrive at a common/consensus score for each requirement.

9.2.4. The Evaluation Team Chair may exercise judgement where a difference remains and will make a determination. Any differences will be documented in the Evaluation Report each with their retrospective strength, weakness, opportunities and risks.

STAGE 3B: REGIONAL CONTRIBUTION AND INDUSTRIAL RELATIONS (IF APPLICABLE)

9.2.5. <u>PART 1: Local Industry Participation Policy (LIPP):</u> The LIPP component of each Tender response will be evaluated by the Evaluation Team using the Economic Contribution Test (ECT) OR Local Industry Participation Plan (Local IP Plan).

9.2.6. Tenderer's responses to the LIPP component will be scored through the application of the LIPP Evaluation Worksheet. The Evaluation Team Facilitator will prepare the LIPP Evaluation Worksheet for the Evaluation Team's use by prefilling in the project details and the dollar figures provided by the Tenderer in its Tender response.

9.2.7. The Evaluation Team will for each of the listed sub-criterion:

(a) firstly assess the written response provided a score (out of 10);

(b) a percentage figure for economic contribution will then be calculated from the local spend over the total spend declared by the Tenderer in its response; and

(c) the LIPP Evaluation Worksheet will automatically apply a modifier (+15%) for each sub-criterion's percentage figure to calculate a final 'raw score.'

9.2.8. The following weightings will be applied to the four LIPP sub-criteria:

(a)	Regional Employment	2.5%
(b)	Local Suppliers	2.5%
(c)	Regional Skills Development	2.5%
(d)	Regional Investment	2.5%

STAGE 3C: INTERVIEWS, PRESENTATIONS, DEMONSTRATIONS, SAMPLES, PROTOTYPES

9.2.9. Not Required.

STAGE 3D: CLARIFICATIONS

9.2.10. If during the course of Stage 3: Technical Assessment it is considered necessary to seek clarification from Tenderers on certain aspects of their Tender response, a clarification question will be drafted by the Evaluation Team member raising the question and managed in accordance with this Stage 3D: Clarifications. Final wording of clarification will be confirmed with advice for the Evaluation Team Chair.

9.2.11. Clarification of Tender responses may be sought from Tenderers. All requests for clarification must be in writing and approved by the Evaluation Team Chair. Tenderers will be asked to direct their answers be in writing and submitted to the Evaluation Team Facilitator.

9.2.12. The Evaluation Team Facilitator may consult the Probity Advisor (if one is appointed) prior to issuing any clarification question.

9.2.13. Clarifications are permitted through the evaluation process if information provided in a Tender is not capable of evaluation because it is uncertain, ambiguous or inconsistent or an unintended error of form has occurred. This is where it appears that a Tenderer has made an obvious mistake which is likely to have been unintended and is easily rectified (e.g. failed to attach a supplementary information attachment). Where a clarification is of a more general nature, then advice/information should be requested from all Tenderers.

9.2.14. Clarifying questions will not be used to enable a Tenderer to provide new information. Any additional information submitted by a Tenderer will need to be assessed to determine whether it is truly a clarification of tendered information or whether it effectively amounts to the submission of late material that seeks to vary the existing Tender response. Requests for clarification must specifically identify the aspects (compliance items, Weighted and Non-Weighted Assessment Criteria, pricing information etc.) of the Tender response that requires clarification and nominate a timeframe within which a response is required.

9.2.15. Clarification from a Tenderer must be sought by the assigned Evaluation Team Facilitator via email, and the questions must be cleared in advance by the Evaluation Team Chair and/or the Probity Advisor. The Evaluation Team Chair may require that the return responses by Tenderers be reviewed by the Probity Advisor prior to the release of clarification responses to the Evaluation Team.

9.2.16. Tenderers will be informed that the request for clarification is not an opportunity to revisit or revise their Tender response.

STAGE 3E: SHORT-LISTING

9.2.17. If acknowledged as an option in the RFT, Tender responses may be shortlisted. If the possibility of shortlisting has not be stated in the RFT, it cannot be considered.

9.2.18. To establish a shortlist CIT is still obligated to evaluate all conforming Tender responses to the stage at which shortlisting is stated in the RFT to occur. The degree of analysis applied to shortlisting must be of sufficient rigour to ensure excluded Tenderers are clearly non-competitive and stand no reasonable chance of exhibiting the best Value for Money and therefore will not be selected as a preferred Tenderer.

9.2.19. The objective of Stage 3: Technical Assessment is to identify which Tenderers can deliver requirements to a satisfactory level on the basis of their Tender response and set aside Tender responses from further evaluation in accordance with the following:

(a) where a conflict of interest exists or is perceived to exist;

(b) where the Tender response demonstrates a low level of compliance with the Assessment Criteria, the Draft Contract and any other conditions that may apply;

(c) where there is lack of experience in providing Consultancy of a similar nature;

(d) insufficient evidence of demonstrated capability to efficiently and effectively manage and provide the Consultancy;

(e) an adverse security, integrity and/or probity check of the Tenderer;

(f) an adverse or insufficient financial capability assessment of the Tenderer; or

(g) the Tender responses are not demonstrably viable based on the tendered pricing.

9.2.20. Where Tender responses are unsuccessful as a result of a shortlisting stage, the record of the approach applied, activity undertaken and outcome, and the Delegate's decision / approval, must be recorded. The record itself can be either an individual Shortlisting Report prepared by the Evaluation Team for the Delegate or contained within the Evaluation Report.

9.2.21. To reduce the possible impact to Tenderers resourcing, if the Delegate has approved a Shortlisting Report, unsuccessful Tenderers from the shortlisting stage may be informed promptly that their Tender responses have been unsuccessful.

9.2.22. If a Tenderer is not shortlisted the Evaluation Team must ensure that the reasons for not short listing any Tenderer are comprehensively documented (for audit review and Tender debriefing purposes).

9.2.23. CIT must be able to provide sufficient detail to support this decision, as well as provide meaningful feedback to any unsuccessful Tenderer as part of a potential debrief.

9.3. Stage 4: Pricing Assessment

9.3.1. The Evaluation Team will undertake a pricing analysis for each compliant Tenderer's RFT Pricing in an objective manner (for example, may include against benchmarks such as historic data/industry standard rates) to determine an offered rate's viability.

9.3.2. Where the items to be supplied are clearly defined, the Evaluation Team may research similar arrangements in other jurisdictions as part of their price benchmarking analysis.

9.3.3. Any pricing assumptions listed by a Tenderer will be considered in relation to its relevance to CIT requirements and expectations for the Consultancy.

9.3.4. A comparison of each Tenderer's submitted prices/rates for each of the personnel and the Consultancy to be provided against the calculated mean price of the Tender response may also be undertaken to identify submitted prices that have a significant variance from the mean which might signal a risk to CIT.

9.3.5. The submitted prices/rates and their relationship to the forecasted CIT budget should be considered to determine whether submitted prices are a viable financial option.

9.3.6. Pricing information will not be provided to the Evaluation Team prior to the completion of Stage 3: Technical Assessment. This is to ensure a two-stage evaluation process where price does not influence evaluation of the Weighted Assessment Criteria / technical criteria. However, where there is a separate Evaluation Team individual or team dedicated to undertaking the financial analysis, evaluation of price may be undertaken from the commencement of the evaluation. Findings will not be provided to the Evaluation Team members assessing Weighted Assessment Criteria / technical criteria until the Technical Assessment has been finalised.

9.4. Stage 5: Risk Assessment

9.4.1. The Evaluation Team must assess all conforming Tender responses (and any non-conforming Tender responses submitted to further evaluation) against the Non-Weighted Assessment Criteria.

9.4.2. The Evaluation Team should outline in the Evaluation Report its analysis and basis for decisions made.

STAGE 5A: ASSESSMENT OF RISK

9.4.3. The Evaluation Team must undertake a full assessment for each Tender response in respect to risks identified on the Evaluation Risk Register.

9.4.4. Risks may include, but not be limited to:

(a) the identification of shortfalls in a Tenderer's response in terms of the offered capability, capacity, business systems, proposed methodology/solution;

(b) the results of the analysis undertaken on the submitted prices, discounts and any associated assumptions;

(c) referee reports;

(d) financial viability assessment information;

(e) the results of a demonstration/presentation (if included);

(f) risk associated with a Tender response being assessed as unacceptably high risk against any Assessment Criteria; and

(g) Innovation/value-adds being offered.

9.4.5. After consideration of the risks as noted in the Evaluation Risk Register, each Tender response will then be assigned a risk rating of 'Low', 'Medium', 'High' or 'Extreme' based on the highest residual risk rating for its entire response. ‘High’ and ‘Extreme’ risks together with mitigating strategies should be clearly described in the Evaluation Report.

9.4.6. The risk assessment must include a consideration of the Assessment Criteria, including the Statement of Compliance.

9.4.7. In undertaking their Value for Money comparative assessment, the Evaluation Team must take into consideration any report of the legal advisor regarding Contractual compliance associated with each Response and associated risks.

9.4.8. In determining the risk profile presented by each Tender response, the Evaluation Team must assess risk in terms of likelihood of the Tenderer achieving what has been offered in its Response. Individual assessments of perceived risk may vary among members of the Evaluation Team. The Evaluation Team must resolve variations as they are identified by discussion and the application of the risk assessment factors.

STAGE 5B: REFEREE INFORMATION

9.4.9. In the RFT **Attachment C - Response Schedule**, the Tenderer is requested to provide a minimum of three referee contacts in its Tender responses. The Evaluation Team may, at their discretion, approach the nominated people of any / all Tenderers to validate information (performance based) provided in its Tender response.

9.4.10. The Evaluation Team may also approach any business area of the ACT Government, which has had a prior commercial arrangement with the Tenderer to request further information regarding past performance and Territory satisfaction with the Consultancy provided. This RFT should acknowledge this possible action.

9.4.11. In the event of a referee or a business area providing negative comments about a Tenderer, the Evaluation Team should provide the Tenderer in question an opportunity to respond to those comments. Both referee comments and Tenderer responses should be considered in finalising the risk ratings.

9.4.12. The Evaluation Team may exercise its discretion to approach only the shortlisted Tenderers or those deemed in contention for preferred Tenderers status for the procurement.

9.4.13. In undertaking this validation process, the Evaluation Team Chair should prepare a series of questions, relevant to the Statement of Requirements, which will be asked of referees to verify information supplied by one, some, or all Tenderers.

9.4.14. For the avoidance of doubt, referee responses will not be a Weighted Assessment Criterion, but may be used in the risk assessment process.

STAGE 5C: ADDITIONAL CORPORATE / FINANCIAL INFORMATION

9.4.15. As advised in the RFT, after the Tender closes the Evaluation Team may, at its discretion, require any preferred Tenderer (or any Tenderer) to submit additional information for the purposes of CIT assessing the preferred Tenderer’s or any Tenderers’ corporate and/or financial viability to provide the Consultancy, which may, inter alia, include the following:

(a) details of any person/entity in a position to control or influence the Tenderer;

(b) details of related companies or organisations, the identity of any trust or fiduciary capacity;

(c) details of any claims or demands or actions against the Tenderer that are relevant to the Tenderer's potential on-going financial viability;

(d) if part of a group of companies or organisations, relevant information in relation to the group's ability to Contract with CIT as a single legal entity; and

(e) financial statements from previous years.

9.4.16. If the Tenderer fails to provide any requested information within a specified time, or if on review of the provided information the Tender response is assessed as posing financial stability concerns, the Evaluation Team, may assign the Tenderer as a high financial risk.

9.4.17. In the event CIT requires a Financial Assessment Report to be undertaken using a member of the Whole of Government Financial Assessment Services and Business Entity Search Services Panel, the fee for doing this will be advised to CIT beforehand. CIT will need to confirm in writing its agreement to pay the fee involved before the report(s) is requested.

STAGE 5D: EXTERNAL FEEDBACK PROCEDURES

9.4.18. UnionsACT, Environmental Protection Agency, and the Long Service Leave board are advised upon the close of each Tender response, the names of the organisations which submitted a Tender response. If any of these listed organisations have a concern about any Tenderer, they may request an opportunity to submit a comment.

9.4.19. Each of the listed organisations will then be provided the opportunity by the Evaluation Team Facilitator to submit comment regarding the WHS, Industrial Relations or employment practices of a Tenderer in response to the Tenderer's submitted Ethical Supplier Declaration. This opportunity will only be extended for Tender responses that involve;

(a) a significant component of manual labour; or

(b) a significant influence on the environment.

9.4.20. The comments will be submitted according to the set format of the Agency Feedback Form and will only include factual information. The Evaluation Team Facilitator will then pass the Union Comments noted on the Form to the Tenderer for the Tenderer to exercise its right of reply. The resulting document will then be considered as part of risk assessment by the Evaluation Team.

9.5. Stage 6: Value for Money Assessment

STAGE 6A: VALUE FOR MONEY ASSESSMENT

9.5.1. Following the Stage 3: Technical Assessment; Stage 4: Pricing Assessment and the Stage 5: Risk Assessment, the Evaluation Team will undertake a Value for Money assessment, for each category tendered by the Tenderers, collectively taking into account:

(a) the results each of Tenderers Total Weighted Assessment Score;

(b) the results of the pricing evaluation;

(c) consideration of any Non-Weighted Assessment Criteria; and

(d) risk posed to CIT.

9.5.2. The Evaluation Team may consider, for example, if various aspects of a Tender response justify the price and whether any additional positive attributes of any higher priced Tender response provide better overall value to CIT than the attributes contained in any lower priced bids.

9.5.3. Prior to commencing either a BAFO or Structured Negotiation activity, the Evaluation Team may submit an Interim Report, or advise the Delegate of the proposed approach.

9.5.4. The Evaluation Team must clearly outline in the Evaluation Report its Value for Money analysis and basis for decisions made (including any BAFO or Structured Negotiation activity undertaken).

STAGE 6B: BEST AND FINAL OFFER (OPTIONAL)

9.5.5. If acknowledged in the RFT, the Evaluation Team may decide to undertake a BAFO process by inviting Tenderers to submit a BAFO in relation to all or certain aspects of their respective Tender responses.

9.5.6. Prior to commencing a BAFO, the Evaluation Team will submit an Interim Report, or advise the Delegate of the proposed approach.

9.5.7. A BAFO may only be used if:

(a) the RFT has denoted a BAFO may be undertaken; and

(b) costs submitted by all Tenderers are unacceptably high; or

(c) it has become apparent that there was an error, misdescription or uncertainty in the RFT that has affected Tender results;

(d) a preferred Tenderer cannot be clearly determined based on the evaluation of the responses against the Value for Money Assessment.

9.5.8. Notwithstanding any shortlisting, the Evaluation Team may invite only Tenderers who the ET considers capable of delivering the desired outcomes and are most likely to represent value for money, to submit a BAFO.

9.5.9. The Evaluation Team will notify Tenderers who are invited to participate in the BAFO (if any) of the process and timeframe to submit a response to the Territory.

9.5.10. Those Tenderers will then be given an opportunity to revise their Tender response, but only to the extent specifically outlined in the BAFO.

9.5.11. Following the conclusion of this Stage 6B Evaluation Team members will review and update Value for Money Assessment results for each Tenderer invited to submit a BAFO, to reflect that Tenderer's BAFO response.

STAGE 6C: STRUCTURED NEGOTIATION (OFFER DEFINITION) - OPTIONAL

9.5.12. If acknowledged in the RFT, the Evaluation Team may decide to undertake a Structured Negotiation (Offer Definition) process by inviting Tenderers to engage in an interactive refinement of their offer, and to enable the Evaluation Team to finalise its evaluation and selection of the preferred Tenderer or Tenderers, prior to entering into negotiations.

9.5.13. Prior to commencing Structured Negotiation activity, the Evaluation Team may submit an Interim Report, or advise the Delegate of the proposed approach.

9.5.14. Where the Evaluation Team concludes that structured negotiations are required with Tenderers to enable the Evaluation Team to distinguish between Tenderers or maximise the benefits to CIT of the Tenderer's offer, it will inform the Delegate of its preference to conduct structured negotiations with one or more Tenderers (which may be parallel negotiations), which may include Tenderers being asked to improve any or all aspects of their Tender response.

9.5.15. Only Tenderers who the Evaluation Team considers capable of delivering the desired results, based on their submitted Tender response, including the results of the Value for Money Assessment, can be invited to participate in a Structured Negotiation (Offer Definition).

9.5.16. Following Delegate approval to commence structured negotiations, CIT may give notice to Tenderers that it wishes to commence structured negotiations.

9.5.17. Notifications and exchanges of negotiation issues and responses from Tenderers to issues may be controlled by the Evaluation Team Facilitator.

9.5.18. Any structured negotiation may be used if the Evaluation Team considers the BAFO process will not facilitate the resolution of all outstanding issues with Tenderers to a standard which justifies the appointment of a preferred Tenderer.

9.5.19. During negotiations, Tenderers must not be permitted to raise areas of non-compliance with the Draft Contract terms and conditions that were not stated clearly in the Statement of Compliance or elsewhere in their Tender.

9.5.20. CIT may accept or exclude any Tender response in negotiations, and decide on the inclusion of any Tender response to negotiations.

9.5.21. Tenderers may revise their tendered pricing based on the outcomes of this Structured Negotiation (Offer Definition) activity; however, Structured Negotiation (Offer Definition) may not be used by Tenderers to change the fundamental basis on which their pricing has been calculated. Revised pricing should not be considered where the revision is considered to change the underlying basis of the tendered price or where such consideration would contravene Evaluation Team's obligations to treat all Tenderers fairly.

9.5.22. The Structured Negotiation may address any areas of deficiency particular to the Tenderer's offer where such consideration would not contravene Evaluation Team's obligations to treat all Tenderers fairly.

9.5.23. The Evaluation Team Facilitator may seek advice from the Probity Advisor during negotiations to ensure that the Tenderers are not given an unfair advantage.

9.5.24. The Evaluation Team Facilitator will notify Tenderers who are invited to participate in any Structured Negotiation (Offer Definition) of CIT's process and timeframe.

9.5.25. In the event that CIT concludes that during the RFT process, a Tenderer has retracted, or attempts to retract, representations it has made in its Tender response, CIT may:

(a) suspend negotiations and consider making any adjustment to the Value for Money comparative assessment based on the retractions or representations;

(b) terminate this RFT process, if that is in the public's interest and/or if no other Tender response represents Value for Money; or

(c) re-enter negotiations with other Tenderers (including or excluding the preferred Tenderer.

9.5.26. Following the conclusion of this Stage 6C, Evaluation Team members will review and update Value for Money Assessment results for each Tenderer invited to Structured Negotiation (Offer Definition) to reflect that Tenderer's agreed outcomes.

9.5.27. The Evaluation Team will prepare a summary of negotiated outcomes inclusive of the reviewed risk ratings, price and scores and the negotiation outcome. The Evaluation Report will include the negotiation outcome and final Value for Money assessment.

9.6. Stage 7: Evaluation Report

9.6.1. The Evaluation Team will maintain appropriate documentation of the decision making process for each procurement. The Evaluation Team must prepare the Evaluation Report for submission to the Delegate for final approval.

9.6.2. The Evaluation Report will comprise of the following:

(a) executive summary;

(b) the RFT process followed;

(c) details of any Late Tender responses received, and the actions taken;

(d) the actions taken by the Evaluation Team where any Threshold Assessment Criteria were not met by any Tender response;

(e) any Technical and/or Specialist Advisors who provided input must be named in the Evaluation Report with the role they undertook during the evaluation;

(f) the evaluation process, including detailed justification (comments and scores) against each Weighted Assessment criterion (including details of any shortlisting, interviews, presentations, demonstrations, samples or prototypes provided);

(g) summary of any clarifications sought and details of any discussions with Tenderers;

(h) details of any referee check, corporate and/or financial viability checks;

(i) summary of the assessment of each Tender response including the risk rating, and details of any identified risks rated as "Extreme". A summary for each Tenderer including, strengths and weaknesses, identified errors and omissions, number and nature of clarification questions and any risks and issues;

(j) a summary of identified risks and any treatment measures required/considered;

(k) a summary Value for Money assessment considerations;

(l) the ranked order of Tenders (where applicable, within each nominated Service Category if applicable);

(m) details of any BAFO or Structured Negotiation activity undertaken and resultant outcome with a commentary on final Value for Money assessment findings;

(n) any issues that will need to be resolved by negotiation (where an Evaluation Report includes a list of negotiation items, a supplementary report detailing the negotiation outcomes may be forwarded to the Delegate for final consideration/approval prior to entering into contract); and

(o) recommendations to the Delegate for consideration / approval.

9.6.3. The Evaluation Report may recommend that:

(a) a Tenderer be selected as the successful Tenderer; or

(b) no Tenderer is selected as the successful Tenderer and the RFT process be terminated, if that is in the public's interest and/or if no other Tender represents Value for Money.

9.6.4. Consistent with Section 22A of the *Government Procurement Act 2001*, the Evaluation Team will recommend to the Delegate the Tenderer (if any) that offers the best overall Value for Money outcome to CIT.

9.6.5. The Evaluation Team on completion of the Evaluation Report must collectively sign the report for submission to the Delegate for his/her consideration.

9.7. Stage 8: Finalise Selection of Successful Tenderer

STAGE 8A: SELECTION OF THE SUCCESSFUL TENDERER(S) AND FINALISING THE CONTRACT(S)

9.7.1. Following any negotiations, or at any other stage in the evaluation process, CIT may select a successful Tenderer to provide the Consultancy.

9.7.2. The Contract offered to a successful Tenderer will be made on the basis of:

(a) the terms and conditions of the RFT and in particular the Draft Contract;

(b) the successful Tender; and

(c) any negotiations with the successful Tenderer.

STAGE 8B: NOTIFICATION OF THE SUCCESSFUL TENDERER

9.7.3. Neither the lowest priced Tender response, nor any Tender response, will necessarily be accepted.

9.7.4. A Tender response will not be deemed to have been successful until notice in writing for and on behalf of CIT of such an outcome is issued.

9.7.5. Acceptance of a Tender will be subject to the execution of a Contract between CIT and the Delegate approved successful Tenderer.

STAGE 8C: NOTIFICATION OF UNSUCCESSFUL TENDERERS AND DEBRIEFING

9.7.6. Once the Contract has been executed with the Delegate approved Tenderer, unsuccessful Tenderers must be notified in writing and should be given the opportunity of a debrief.

9.7.7. CIT will notify each unsuccessful Tenderer in writing that its Tender response has not been successful after the signing of the Contract with a successful Tenderer, or the end of the Tender process, whichever is the later.

9.7.8. Tenderers will not be provided with information concerning other Tender responses, except for publicly available information such as the name of any successful Tenderer and the total price of the winning Tender.

9.7.9. The debrief provided to Tenderers (on request) will provide feedback on their Tender response and the relative merits against the Assessment Criteria and will not refer to any other Tender response. No confidential information about any other Tenderer will be disclosed or comparisons made with other Tender responses.

9.7.10. Debriefs will be cleared by the Evaluation Team Chair and/or Probity Advisor if using prior to provision.

10. Acknowledgement and Endorsement

10.1.1. Prior to the provision of Tender responses to the Evaluation Team by the Evaluation Team Facilitator, each Evaluation Team member must sign the Evaluation Plan acknowledging that they have received a copy of this Evaluation Plan, have read and understood their roles and responsibilities and will abide by the requirements detailed within the Evaluation Plan.

10.1.2. Each Evaluation Team member must also read, comply with and sign a Deed of Confidentiality and Conflict of Interest form.

10.1.3. The Evaluation Team members hereby acknowledge:

(a) they have read, acknowledge and agree to the process, activities and obligations set out in this Evaluation Plan (including all its attachments);

(b) that as a condition of participating in the evaluation process, they have read and agree to comply with the Territory Probity Standard; and

(c) agree to evaluate the Tender responses in accordance with this Evaluation Plan inclusive of the Assessment Criteria outlined at **clause 8** - Assessment Criteria.

EVALUATION TEAM: ACKNOWLEDGEMENT AND ENDORSEMENT	
EVALUATION TEAM	**Signature**
Name: Andrew Whale Title: Executive Director, Corporate Services (CIT) . Date:	Signature: ______________ Evaluation Team Chair
Name: Fiona Mitchell Title: Director, Business and Leadership (CIT). Date:	Signature: ______________ Evaluation Team Member
Name: Cheryl Steff Title: Senior Director, Human Resources, Corporate Services (CIT) Date:	Signature: ______________ Evaluation Team Member

Schedule 1. Scoring Scale

Descriptor	Response (Prompts)	Rating
Outstanding	Response to Weighted Assessment Criterion far exceeds all of the relevant SOR requirements and provides major additional value to the Territory. Response demonstrates an outstanding understanding of the requirements of the Weighted Assessment Criterion and presents a strategic view of the Goods and/or Services within the broader Territory context. Information provided is concise, extensive and offers some knowledge gain to the Territory. All claims are fully substantiated.	**10**
Excellent	Response to Weighted Assessment Criterion exceeds all of the relevant SOR requirements such that the Territory will receive some additional value above the SOR. Response demonstrates an excellent understanding of the requirements of the Weighted Assessment Criterion. Information provided is comprehensive. All claims are fully substantiated.	**9**
Very Good	Response to Weighted Assessment Criterion meets all of the relevant SOR requirements and exceeds some relevant SOR requirements such that the Territory will receive minor value above the SOR for those. Response demonstrates a very good understanding of the requirements of the Weighted Assessment Criterion. All claims are soundly substantiated. Some minor omissions in substantiation may occur but the overall claim is well supported.	**8**
Good	Response to Weighted Assessment Criterion meets all of the relevant SOR requirements and may marginally exceed some relevant SOR requirements. Response demonstrates a good understanding of the requirements of the Weighted Assessment Criterion. Some insignificant uncertainties occur but claims or documentation contains majority of the information expected of this Weighted Assessment Criterion.	**7**
Adequate	Response to Weighted Assessment Criterion meets all of the relevant SOR requirements. Response demonstrates an adequate understanding of the requirements of the Weighted Assessment Criterion. Some minor uncertainties or information gaps occur but claims or documentation generally contains the information expected of this Weighted Assessment Criterion.	**6**
Reservations	Response to Weighted Assessment Criterion meets most of the relevant SOR requirements. Response demonstrates a general understanding of the requirements of the Weighted Assessment Criterion but lacks detail in specific areas. Some uncertainties or information gaps occur in key requirements.	**5**
Poor	Response to Weighted Assessment Criterion does not meet a minority of the relevant SOR requirements. Response demonstrates a poor understanding of the requirements of the Assessment Weighted Assessment Criterion with some shortcomings or deficiencies. Claims and documentation omit or are unable to substantiate key requirements of the Weighted Assessment Criterion.	**4**
Very Poor	Response to Weighted Assessment Criterion does not meet a majority of the relevant SOR requirements. Response does not demonstrate an understanding of the requirements of the Weighted Assessment Criterion, through lack of provided detail or information. Claims and documentation omit or are unable to substantiate requirements of the Weighted Assessment Criterion.	**3**
Inadequate	Response to Weighted Assessment Criterion meets only a negligible number of the relevant SOR requirements. Response demonstrates a minor misunderstanding of the requirements of the Weighted Assessment Criterion, containing significant flaws in approach. Claims and documentation are mostly unsubstantiated.	**2**
Not Acceptable	Response to Weighted Assessment Criterion does not meet any of the relevant SOR requirements. Response demonstrates a major misunderstanding of the requirements of the Weighted Assessment Criterion, lacking fundamental details to address this Weighted Assessment Criterion. Claims and documentation are unsubstantiated and unreliable.	**1**
Not able to access	Response did not address this Weighted Assessment Criterion. (NOTE: There needs to be confirmed evidence of this circumstance). Response was not evaluated, as it did not provide any requested information.	**0**

Procurement ACT

Address: GPO Box 158 Canberra ACT 2601

Phone: +61 2 6205 9797

Email: procurementact@act.gov.au

Sharp, Rebecca (CIT)

From: Cover, Leanne
Sent: Friday, 3 April 2020 6:16 PM
To: Cover, Leanne
Subject: FW: ET Evaluation Report [SEC=UNCLASSIFIED]
Attachments: GS002147 Evaluation Report - ET.pdf; GS0002147- Schedule 1 - Evaluation Plan.pdf; GS0002147 - Schedule 2 - Evaluation Worksheet.xlsx; GS0002147 - Schedule 3 - Pricing Comparison.xlsx; FW: TET Evaluation Report; Re: TET Evaluation Report

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From: Kemp, Ilze <ilze.Kemp@cit.edu.au>
Sent: Friday, 3 April 2020 4:44 PM
To: Cover, Leanne <Leanne.Cover@cit.edu.au>
Cc: Whale, Andrew <Andrew.Whale@act.gov.au>
Subject: ET Evaluation Report

Hi Leanne

Andrew asked me to forward you the evaluation report and attachments for the Provision of Organisational Transformation Strategic Guidance and Mentoring Services to CIT 2020 to 2021.

The evaluation report and amended evaluation plan were approved via email. Please let me know if you would like me to forward you a copy of the emails.

Regards
Ilze

[redacted]	[redacted]
[redacted]	[redacted]
[redacted]	[redacted]

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Canberra Institute of Technology
RTO Code 0101 | CRICOS No. 00001K

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[redacted]

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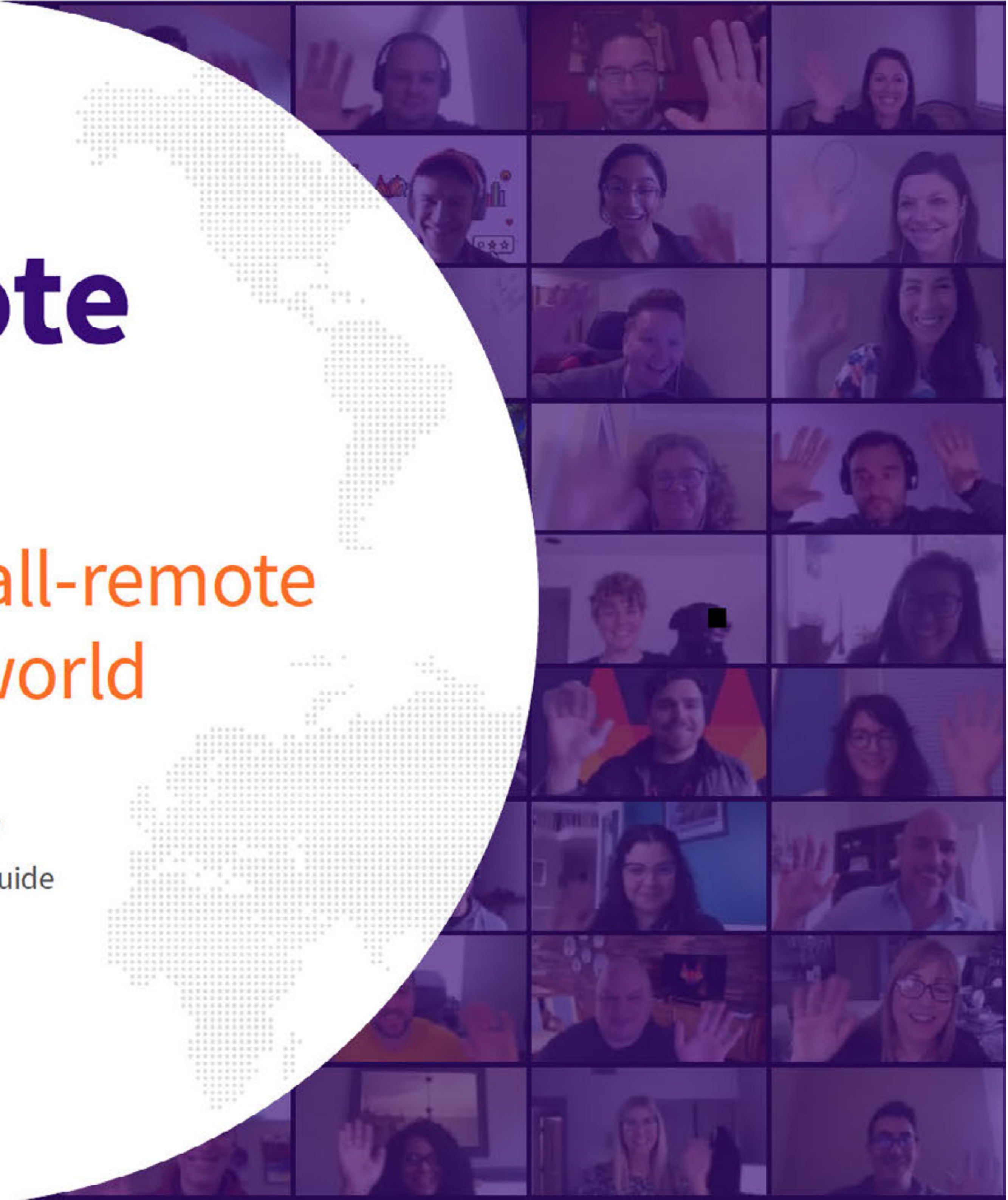
2020

The Remote Playbook

from the largest all-remote company in the world

- Tips for making remote work
- Tactics for remote transition and fluency
- The most comprehensive remote work guide



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Preparing for the future of work

Due to recent events surrounding the global health crisis COVID-19 (coronavirus), many teams face a new reality: working remotely. We hope this playbook serves as a quick start guide to get your remote workforce up and running quickly and smoothly for short-term and long-term success.

As technology and internet access has improved, more of the world's workforce opt to work from anywhere. GitLab's recent *Remote Work Report* revealed that **86%** of respondents believe remote work is the future of work. Today, a quarter of remote work settings are all-remote, where all employees work remotely and in their native time zone. In addition to employee benefits like flexibility and zero commute time, remote work employers consistently experience increased productivity, efficiency, and employee morale. In the words of Fast Company, "remote work isn't going away anytime soon."

Enabling a remote workforce is not "business as usual." There are critical differences in managing in-office and remotely: communication, culture, and management must adjust. Luckily, remote work has rapidly increased over the years and there are several methods to make remote work a success.

The Remote Playbook aims to answer one simple question: "How do we transition to remote work?" Whether it's unwinding from offices completely and going all-remote or attempting to level the playing field for in-office and remote workers, the question of "how do we do this?" is a giant one. GitLab has been working on the answer since 2014.

For GitLab, being an all-remote company didn't start as an intentional decision; it was a natural evolution as our first team members started to work from home. As a complete DevOps platform, GitLab the product fundamentally changes how teams work by bringing cross-team collaboration and communication into a single platform. With everyone contributing to a single conversation within the tool, there was little reason to congregate in an office.

Today, GitLab is the world's largest all-remote workforce with **1,200+** employees across **67** countries, and we've been iterating and documenting how to work remotely for years. This comprehensive guide contains our lessons learned and proven methods on how to stabilize a remote workforce, diving into topics including asynchronous workflows, meetings, communication, culture, and management.

From very early on, we started writing things down. [Coming to the office] wasn't needed. **They weren't getting any extra information**. They were on Slack, on Zoom, in Google Docs, in GitLab pages, in GitLab Issues, in GitLab merge requests – they didn't need to be there.
— **Sid Sijbrandij**, co-founder and CEO at GitLab

5 Tips for remote leaders

01 ESTABLISH A REMOTE LEADERSHIP TEAM

Rally a team of experts who have remote work experience, can communicate nuances, and serve as resources to others. A core part of this team's role will be to document challenges in real time, transparently prioritize those challenges, and assign directly responsible individuals (DRIs) to find solutions.

02 ESTABLISH A HANDBOOK

This will serve as a single source of truth and should be communicated company-wide. This can start as a single company webpage or repository in Notion or Ask Almanac. One of the most sizable challenges when going remote is keeping everyone informed efficiently. Put concerted effort in systematically documenting important process changes in a central place to minimize confusion.

03 ESTABLISH A COMMUNICATIONS PLAN

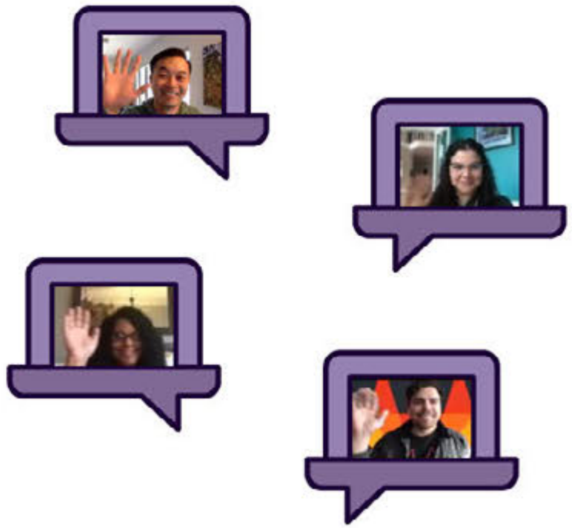
Whatever your current view on transparency, leaders shouldn't hold back during this time. Team members will expect frequent updates as leaders iterate on their communication plan in real-time. Consider an always-on video conference room per team, where team members can linger, or come and go as they please. This simulation helps acclimation, enabling team members to embrace the shift to remote in a less jarring way. It also shows intentionality around informal communication — an important element that occurs spontaneously in an office, and needs an immediate replacement in a remote setting. For a fast-boot on this front, consider replicating GitLab's public communication guide.

04 MINIMIZE YOUR TOOL STACK

While functioning remotely, strip the tool stack down to a minimum. Google Docs, a company-wide chat tool (like Microsoft Teams or Slack), and Zoom are all you need to start. If your team needs access to internal systems through a VPN, ensure that everyone has easy access and clear instructions on usage.

05 DRIVE CHANGE

For companies with a strong "in-office experience," it's vital for leadership to recognize that the remote transition is a process, not a binary switch to be flipped. Leaders are responsible for embracing iteration, being open about what is and isn't working, and messaging this to all employees. Managing a remote company is like managing any company. It comes down to **trust, communication, and company-wide support of shared goals.**



5 Tips for remote employees

01

CARVE OUT A DEDICATED WORKSPACE

Where you work is as important as what you work on and who you work with. Aim to dedicate a space where only work occurs, enabling you to focus while you're there and disconnect when you exit. The execution of this will look different depending on your workspace and who is present during your working hours, but the key is to find a space that is purely for work.

02

SEPARATE WORK FROM LIFE

This is likely to be the most difficult hurdle to clear, particularly for new work-from-home employees who have family in the home. You should have a dedicated conversation with family, helping them understand that just because you're home, that doesn't mean you're available. A shortcut to boundary setting is this: "If it's important enough that you'd commute to my usual office and come to my desk, then it's important enough for you to visit my home workspace." You may also consider a busy/available indicator.

When there's no physical office to leave, it's easy to work longer than is expected (or healthy). If useful, set reminders to begin and end work, and plan activities to fill the void where a commute once stood. Proactively planning what you'll do with your commute time is key to ramping into a workday and ramping off. This will look different for each individual, but leaving your home for a walk or running an errand is a great way to create unmistakable separation.

03

ENGAGE WITH PEOPLE

When there's no office to influence spontaneous informal communication, you must be intentional to weave it into your day.

- Schedule regular virtual coffee chats and happy hours using a video call.
- Create an always-on video conferencing room that your team can work from. (And remember, in a remote setting, it's OK to look away!)
- Talk about what you normally would. If sports, vacation plans, and hilarious tales of insubordination by children are common water-cooler material, work with your team to establish a chat channel to discuss things outside of work. The medium may be different, but the connection is the same.
- Drop any shame or embarrassment. Everyone is in the same boat — a forced work-from-home arrangement with no preparation. Don't worry about your background, and feel welcome to let your pets and family find their way into calls on occasion. It humanizes the experience and reminds everyone that we're people first, and colleagues second.
- Connect with family and community. Working remotely gives you an opportunity to spend time with a different set of people than just your coworkers. Look for opportunities to build bonds with others, which may have been impossible or limited when you had a commute.

04 RESPECT THE ROUTINE, BUT EXPERIMENT WITH CHANGE

While asynchronous workflows is a significant benefit of an all-remote team, temporary work-from-home arrangements may be less amenable to massive swings in time zone adoption. If this is the case, it's wise to formulate a routine that closely aligns with your prior routine.

However, don't feel beholden to a routine. A perk of remote is the ability to experiment with unconventional working days. It's understood that not everyone shares the same peak hours of energy and focus. If you feel that you work best in late evenings, for example, have that conversation with your team and experiment with a non-linear workday.

05 ROLL WITH THE CHANGES

Relax: you aren't born knowing how to work from home. Companies shifting from onsite teams to remote are likely to experience growing pains. If not taken in stride, this friction can cause serious harm — operationally as well as culturally. Remember that transitioning to remote, even if temporary, is a process. As you adapt to remote work, be open to trying and experimenting with new ways of working, communicating, and scheduling your day. .

The stages of remote

There are different levels of remote work and every organization has unique needs. It's important to know the stages of remote work when considering what's best for the long term as there are advantages and disadvantages to each.

Company policy on remote work

37% *Hybrid-remote (part of the team works in-office, part of the team works remotely)*	35%	39%	40%	36%
26% *100% remote, each employee works in their own native time zone*	▲30%	▼23%	▼23%	▼22%
25% *Remote work is allowed or tolerated, but is not the norm or default*	▲21%	▼28%	▼28%	▼34%
12% *100% remote, every employee is synched to a company-mandated time zone*	▲15%	▼10%	▼8%	▼8%

The green triangle represents significantly higher/lower at 95% confidence.

(source: The Remote Work Report)

No remote

Some enterprises don't allow for any remote work. This could be due to a leadership mandate, or the nature of the business itself. For example, medical care, live events, and manufacturing can't successfully complete tasks while remote.

It's worth noting that we are seeing new opportunities for remote work arise thanks to technological advancements. The da Vinci Surgical System, for instance, has been used in telesurgery, and communications infrastructure is robust enough in some locales to support remote broadcasting.

Multinational corporations with offices across the globe are inherently remote. An employee in one office is remote to another employee in another office, and a refusal to recognize this reality can make collaborating across offices difficult.

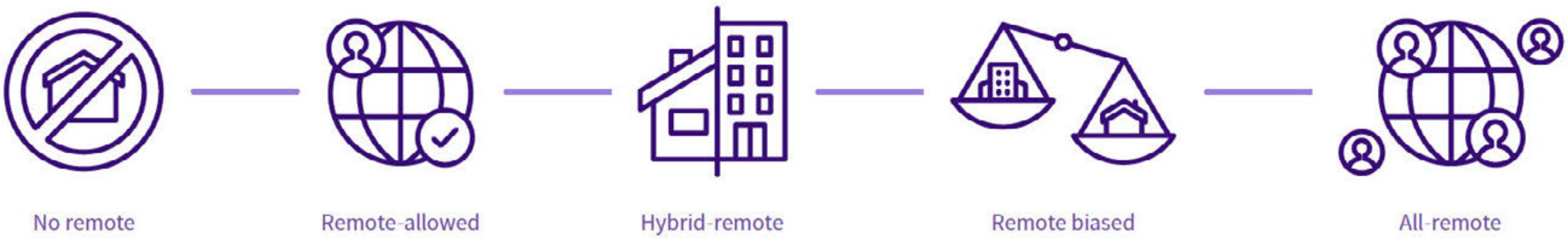
Learning how to facilitate remote work can be beneficial to "non-remote" companies.

Remote-allowed

Also called "remote-tolerated", this stage of remote allows approved employees in a company to work some (but not all) days outside the office.

This is commonly seen in agency and corporate environments where "remote Fridays" are sold as a perk to employment. In such scenarios, it's clear that leadership isn't piloting remote work as a means to judge the feasibility of all-remote, but rather compromising with employee demands for greater flexibility.

These employers are tolerant of some work outside of the office, but still expect an individual to spend the bulk of their time in the office.



Hybrid-remote

Hybrid-remote is more common than all-remote as it's easier for large, established companies to implement. In a hybrid-remote scenario, there are one or more offices where a subset of the company commutes to each day, paired with a subset of the company that works remotely.

For employers who are committed to a colocated model, but wish to expand their recruiting pipeline beyond their HQ, allowing remote employees can be beneficial. Employers may be able to find exceptional team members in a more diverse array of locales, pay them local rates, and sidestep ongoing talent wars in major metropolitan areas.

Employees looking for additional freedom, autonomy, and workplace flexibility will likely view "some remote" as better than "no remote" but hybrid-remote can have some challenges:

1. **Hybrid-remote employees may have less access to information.** Unless the employer documents everything, employees may be asked to handle day-to-day duties with less or incomplete information compared to in-person colleagues. Over time, this can lead to mistakes, confusion, frustration, and even underperformance.
2. **Fewer career and development opportunities**. Hybrid-remote employees who are out of sight may be passed over for promotions, advancement, and development opportunities. They may also have fewer opportunities to move horizontally within the organization, and less influence to create a new role to serve evolving business needs.
3. **The feeling of being a satellite office**. Hybrid-remote employees may feel isolated from the rest of the company. It's important to ask during the interview process how remote colleagues are onboarded, included, and perceived by others. Some employees may not be fazed by this treatment, but it can take a mental and emotional toll on others.
4. **Managing guilt**. It's not uncommon to hear remote workers express guilt if they work in a company that is primarily colocated. Their socialization involves colleagues who may complain about commutes, or express sadness due to an inability to attend family functions. There are inequalities in this arrangement as the remote employee has to empathize with colleagues despite not being required to endure the same inflexibility.
5. **The burden of lobbying for remote**. If an employee is hired in a remote capacity, but this arrangement is not supported equally across teams and managers, a situation may arise where the remote employee is constantly justifying the perceived privilege of not being forced to commute into a physical office.
6. **Determining whether remote is truly offered and supported**. Many large companies will tolerate remote employees, but they won't openly advertise roles as remote, nor will they publicly admit that they support remote work. This creates an exhausting game of hide-and-seek when searching for roles, in addition to searching for remote-friendly managers and teams within such an organization.
7. **Risk of being made an example of**. It's possible for remote employees in a primarily colocated company to be asked questions like "So, how did you finagle a remote arrangement?" This places remote employees in a difficult situation. Either they choose to champion the cause of empowering even more colleagues to work remotely, potentially harming their reputation, or they seem unhelpful by keeping the perceived perk to themselves.
8. **Demands for overperformance**. Remote employees working with colleagues who endure long commutes each day may encounter pressure to deliver results beyond those expected of in-person team members. This stems from a toxic culture of envy, where colocated employees deduce that if they must endure inflexibility and commutes, remote colleagues must produce additional results so as to not get off easier.

Remote, biased towards one time zone

Certain companies allow employees to work remotely but maintain "core team hours." InVision Studio, for example, has members spread across multiple countries and time zones, but aims to achieve "at least a 4-hour overlap with InVision's core team hours, 10am–6pm Eastern Standard Time."

This tends to attract employees who are in relatively close proximity to one another, or at least in a nearby time zone even if located in a different hemisphere.

All-remote, asynchronous across time zones

An all-remote company means there is no office where teams work. In all-remote companies, there's no effort to align team members to a given time zone. Rather, a bias towards asynchronous communication encourages documentation, discourages synchronous meetings as a default for collaboration, and provides greater flexibility for each member to determine the working hours that best suit their lifestyle.

For example, GitLab is a 100% remote company, where each individual works remotely and there are no company-owned offices. With team members in over 67 countries, many time zones are considered. This goes beyond enabling a work from home arrangement; all-remote creates a **work from anywhere** arrangement.

What "all-remote" does not mean

The terms "remote" and "distributed" are often used interchangeably, but they're not quite the same. "Remote" is preferred because "distributed" suggests multiple physical offices. "Remote" is the most common term to refer to the absence of a physical workspace, and being able to do a job from anywhere—at home with family, a coffee shop, traveling, or wherever is most comfortable and productive. All-remote does not mean isolated: Technology allows coworkers to stay closely connected whether through text or in real time via video conferencing.

At the organizational level, "all-remote" doesn't mean simply offshoring work, it means we're able to hire the best talent in the world. It's also not a management paradigm. There is still have a hierarchical organization, but with a focus on output instead of input.

All in all, remote is fundamentally about freedom and individual choice and valuing results, regardless of where work is done.

For employees, being part of an all-remote company does not mean working independently or being isolated, because it's not a substitute for human interaction.

The foundations of remote work

Traditional, on-site companies often take processes, camaraderie, and culture for granted. In a remote environment, these traits have to be cultivated deliberately, a difficult task that becomes easier once organizations embrace the foundations of remote work instead of trying to make remote work with an on-site mindset.

Document everything (yes, everything)

At on-site companies, people can visit each other at their desk to ask a question or just listen to conversations going on around them. While these are certainly convenient for receiving quick answers, they can also be distracting and make companies less productive. By adopting a handbook-first approach, team members have "a single source of truth" for answers. Even though documentation takes a little more time upfront, it prevents people from having to ask the same question repeatedly. Remote work is what led to the development of GitLab's publicly viewable handbook.

DOCUMENTING COMPANY GOALS

Each department and team's quarterly goals, or "objectives and key results" (OKRs), are clearly documented in our handbook for visibility across the company. Revisit these goals monthly, so there's as much transparency as possible around how each team progresses.

DOCUMENTING ONBOARDING

An intentional approach to documentation also helps with onboarding new team members, because everything they need to know is in one place. At GitLab, we provide onboarding buddies to ease the new job jitters, and host a GitLab 101 for new GitLabbers to ask questions.

DOCS INSTEAD OF WATER COOLERS

Leveraging written documentation over physical "water coolers" is more inclusive. While decisions made around office water coolers may be familiar in traditional workplaces, the input is limited to those present. Those who are not present feel left out and miss a valuable opportunity to hear different perspectives.

This way of working is more inclusive. By documenting everything, no one is left out of the conversation and a diverse set of perspectives can be heard.

Have more organized meetings

"How do you do meetings right?" is a common question asked of all-remote companies like GitLab. The truth is that much of the same advice that is applicable to in-person meetings also applies to meetings within an all-remote company, with a few notable distinctions.

MAKE MEETINGS OPTIONAL

At a global, all-remote company, all-remote company, the usual assumptions about availability are opposite the norm. Coordinating over many time zones can make synchronous meetings impractical and inefficient. Anyone who has worked in a corporate environment has likely seen the sarcastic "I Survived Another Meeting That Should Have Been An Email" award. Don't book a meeting by default — strive to make meetings optional.

Aim to record all meetings, particularly when key individuals aren't able to join live. This allows team members to catch up on what transpired, adding context to notes that were taken during the meeting.

HAVE AN AGENDA

We're often asked, "But how do you whiteboard without everyone physically together?" This is where our approach to meetings differs significantly from many on-site companies, but also one of the ways we're able to be more efficient.

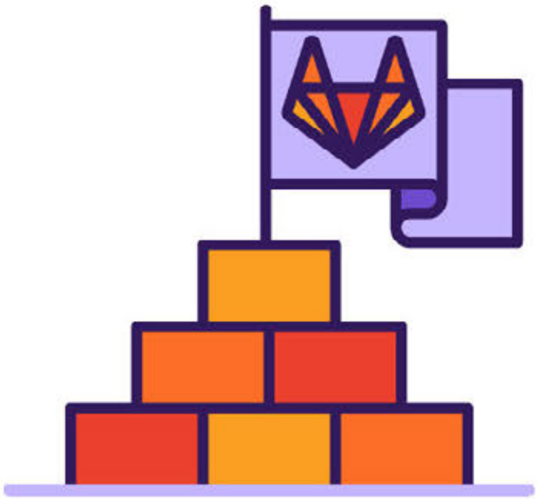
At GitLab, we use Google Docs for collaboration and make sure every meeting has an agenda for documenting discussions, decisions, and actions. Everyone in the meeting can add notes at the same time, and we even finish each other's sentences sometimes.

By brainstorming in text - rather than drawings - we're forced to clearly articulate proposals and ideas, with less room for interpretations. A picture may be worth a thousand words, but it's also open to as many interpretations as there are people viewing it. With Google Docs, we use indentations to go more in-depth on a given topic. This method retains context for comments and discussions, even if someone wasn't present for the original conversation.

Align values with expectations

Values drive action. If your values are structured to encourage conventional colocated workplace norms (such as consensus gathering, or recurring meetings with in-person teams), rewrite them. If values are inconsistent with the foundation of remote work, there's bound to be disappointment and confusion. Values can set the right expectations and provide a clear direction for the company going forward. At GitLab, we are proof that all-remote teams can be just as, if not more productive, than traditional teams, and that's because we have aligned our values with remote work every step of the way.

You're welcome to study GitLab's values, and learn more about how this collection contributes to an all-remote environment.



Key takeaways

1. Document everything and adopt a "handbook-first" approach for company communication.
2. Making meetings optional, require every meeting to have an agenda, take diligent notes, and record meetings for absent attendees.
3. Structure company values to support a remote work environment.

DO

- Encourage social interaction
- Document everything
- Have meetings when necessary

DON'T

- Limit interaction to work-related topics
- Rely on 1:1 transmission of information
- Making meetings mandatory

Making the transition

The reality is that almost every company is already a remote company. If you have more than one office, operate a company across more than one floor in a building, or conduct work while traveling, you are a remote company. It behooves all teams to adopt remote-first practices, even if some interactions occur in a shared physical space.

Create an ergonomic workspace

While long-term remote workers have had years to tweak and iterate on their home office, those who are thrust into working from anywhere may be ill-prepared. Organizations shouldn't expect team members to be masters in office design and ergonomics. What works best for one person will look different to another person. The goal of office ergonomics is to design your workspace to allow for a comfortable working environment for maximum productivity and efficiency.

On the following page are some tips from the Mayo Clinic on how to arrange your workstation.

CHAIR

Choose a chair that supports your spinal curves. Adjust the height of your chair so that your feet rest flat on the floor or on a footrest and your thighs are parallel to the floor. Adjust armrests so your arms gently rest on them with your shoulders relaxed.

DESK

Under the desk, make sure there's clearance for your knees, thighs and feet. If the desk is too low, place sturdy boards or blocks under the desk legs. If the desk is too high, raise your chair. Use a footrest to support your feet as needed. If your desk has a hard edge, pad the edge or use a wrist rest. Don't store items under your desk.

FOOTREST

If your chair is too high for you to rest your feet flat on the floor—or the height of your desk requires you to raise the height of your chair—use a footrest. If a footrest is not available, try using a small stool or a stack of sturdy books instead.

KEYBOARD & MOUSE

Place your mouse in easy reach and on the same surface as your keyboard. Keep your wrists straight, upper arms close to your body, and hands at or slightly below the level of your elbows. Use keyboard shortcuts to reduce extended mouse use. Adjust the sensitivity of the mouse so you can use a light touch to operate it.

MONITOR

Place the monitor directly in front of you, about an arm's length away. The top of the screen should be at or slightly below eye level. The monitor should be directly behind your keyboard. If you wear bifocals, lower the monitor an additional 1 to 2 inches for more comfortable viewing. Place your monitor so that the brightest light source is to the side.

TELEPHONE

If you frequently talk on the phone and type or write at the same time, place your phone on speaker or use a headset rather than cradling the phone between your head and neck.

Adopt a self-service and self-learning mentality

All-remote companies thrive through documentation. Crucially, this requires every team member to be equally invested in perpetuating documentation, creating a virtuous cycle of self-searching, self-service, and self-learning. Managers should continuously reinforce this expectation.

ASSUME YOUR QUESTION IS ALREADY ANSWERED

It's not what you know, it's knowing where to look. This is true at GitLab and other organizations that are intentional about documenting processes, and it is entirely counter to how typical work environments are structured.

It is imperative that new team members operate with the assumption that their questions are already answered. This is a profound process shift that may feel unnatural and inefficient.

For team members this requires retraining. Managers should help team members resist defaulting to tapping on the virtual shoulder of someone as soon as an inquiry comes to mind. Rather, team members should redirect that effort into searching.

Make documentation everyone's responsibility

The ideal response to learning an answer is to document said answer in an act of paying it forward, such that every new hire that comes after will be able to find this information more quickly. Plus, it removes the company-wide burden of having to develop this answer from scratch again. This mentality encompasses many sub-values.

1. Write things down
2. Be respectful of others' time
3. Responsibility over rigidity
4. Move fast by shipping the minimum viable change
5. Ambitious
6. Ownership
7. Sense of urgency
8. Bias for action

For many companies, the frenetic pace of business creates a false sense of justification for bypassing documentation. Once this happens, the only way to consistently learn is to ask another person repeatedly. At scale, this is an extraordinarily wasteful process that leads to exhaustion, watered-down instructions, and huge knowledge gaps as team members cycle in and out.

Most employees are not empowered to shift an entire company culture to one that favors documentation. Thus, one typically builds a skillset of how and when to ask other humans in order to extract information vital to achieving their goals. They know it's a suboptimal approach, but may feel that they have no reasonable alternative. When you aren't given a handbook that is regularly updated and reliably actionable, it feels odd to seek answers first in documentation. Humans tend to trust other humans more than words written in an online repository, which is why it's so vital to humanize a handbook by empowering all members of a company to contribute.

Managing a remote team

"How do you manage when everyone is remote?" is a common question for those leading or managing within an all-remote company.

In truth, managing an all-remote company is much like managing any other company. It all comes down to trust, communication, and company-wide support of shared goals, all of which aid in avoiding dysfunction. Remote forces you to do the things you should be doing way earlier and better. It forces discipline that sustains culture and efficiency at scale, particularly in areas that are easily deprioritized in small colocated companies.

It's important to not assume that team members understand good remote work practices. Managers are expected to coach their reports to utilize asynchronous communication, be handbook-first, design an optimal workspace, and understand the importance of self-learning/self-service. Leaders should ensure that new remote hires read a getting started guide, and make themselves available to answer questions throughout one's journey with the company.

Tips for hiring new team members

1. **Be clear and direct in all communications with candidates.** Virtual interviews can be tough for both sides, so set expectations for both yourself and the candidate at the beginning of the process. Encourage questions, ask for clarification when needed, and be helpful and responsive with any follow-up interactions.
2. **Look for candidates that align closely with company values.** While working remotely, it's important to stick to company values in order to maintain a team mentality – so it will help to assess candidates for those values too.
3. **Look for qualities that make a strong remote employee.** Those include timeliness, dependability, respect, collaboration, perseverance, empathy, kindness, and ambition.
4. **Use video calls to interview and engage with candidates.** Knock down some barriers to communication with video conferencing. Inform candidates ahead of time that the call will be through video, to give them time to prepare and ensure a stable internet connection.

Key takeaways

1. The reality is all companies are already remote in some way; adopt remote-first practices even if some interactions occur in a physical space.
2. Take care to create an ergonomic and efficient work space. The optimal work environment will likely vary from person to person.
3. Documentation is everyone's responsibility. When you ask a question and receive an answer, write it down.

DO

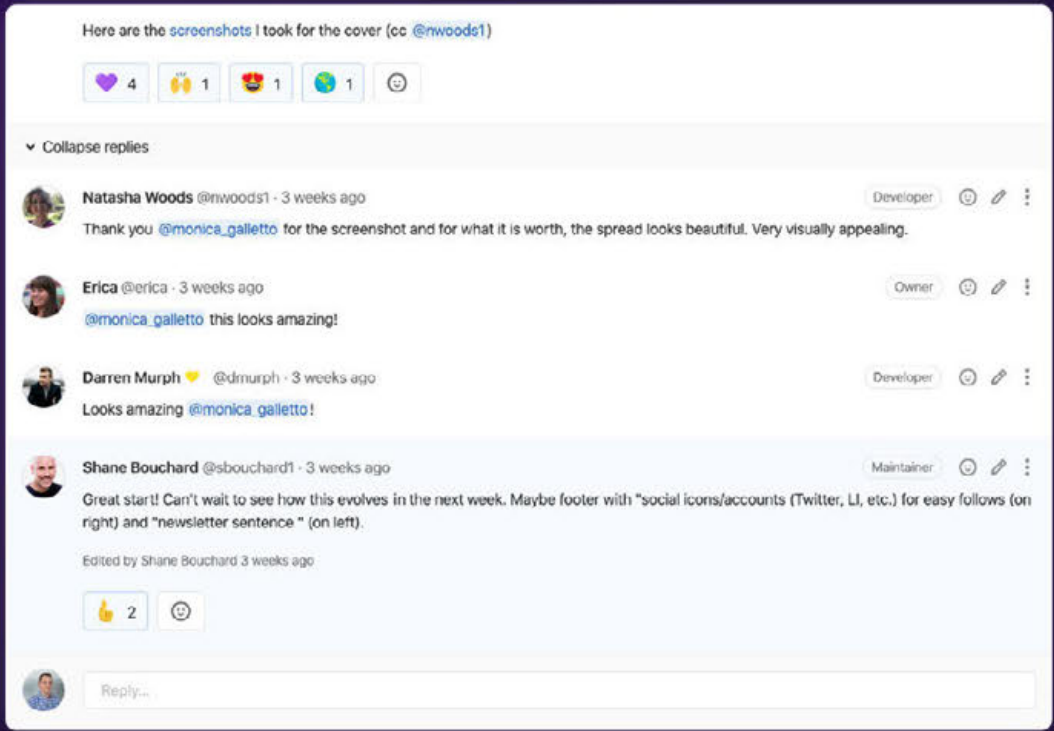
- Adopt a remote-first mentality
- Focus your workspace
- Document answers to questions

DON'T

- Try to replicate the in-office environment
- Tap on the virtual shoulder for answers

Remote communication strategies

Implementing effective communication strategies is an integral component in developing a strong remote work environment. Good communication habits enable team members to feel connected to others and aware of business decisions and operations. Communication is the solution to ensuring that teams don't feel isolated and lost.



Documentation

The motto of remote work should be: "The faintest pencil is better than the sharpest memory." All companies should strive to write things down—to document everything from meeting notes to quarterly objectives. Documenting everything enables a stronger, more informed, more trusting, and more connected team.

Daily documentation

Before meetings, the lead should create an agenda and ask participants to review and add items for discussion. During meetings, participants can write down decisions, ideas, or notes. Because teams are distributed, documentation helps team members understand who is responsible for specific tasks or understand the reasoning behind decisions.

This is one of the harder things to apply on a daily basis. Taking the time to document a solution isn't very satisfying in the moment, and is easy to deprioritize when other seemingly urgent tasks seek your attention.

To relieve tension, empower DRIs to make decisions. It's vital to place a high degree of value on pausing to document. This requires leadership to praise and reward the act of documenting, measuring these contributions as diligently as one would measure sales or conversions.
This also requires humility, and a recognition that human memories aren't perfect. It's impossible to predict the future, but documenting a solution as soon as it's discovered guarantees that the answer will be available should it ever be needed later.

Text-based communication

Textual communication can feel unusual or even uncomfortable for those who come from a colocated environment, where in-person meetings and vocalized communiques are the norm. Embracing text communication and learning to use it effectively requires a mental shift. Mastering this should be seen as a long-term commitment, though there are tips to breaking down barriers and experiencing benefits.

WHY TEXT COMMUNICATION IS IMPORTANT FOR SUCCESSFUL REMOTE WORKING

In remote environments with team members spread across an array of time zones, communicating through text is ideal. Not only is it inclusive and considerate, but a bias towards communicating through text creates a company that documents everything.

Documentation is an essential competitive advantage. Companies which rely on vocalizing end up repeating themselves in meetings, creating an inefficient environment with tremendous opportunity for knowledge leaks. While communicating and documenting through text may feel like a burden in the moment, it prevents a toxic cycle of meetings and touch points which serve only to "bring people up to speed."

Communicating answers to problems via text makes documentation easier. It's vital to understand that nurturing this habit serves more than the person receiving the answer. It is, in essence, paying it forward. Documenting solutions makes a more efficient future for every new hire who joins and asks the same question, not to mention existing team members who join a project or conversation midstream and need to understand what steps have been taken thus far (and why).

Below are several reasons to master the art of textual communication in a business:

- Allows for team members to work **asynchronously**
- Information is **available** to all at the same time
- Allows for **deliberate** thought and processing time
- Inherently **inclusive** (works with screen readers and translation tools)
- Easily **queried** via keyboard or script
- Can be structured and formatted to showcase a **train of thought**

Documentation is an essential competitive advantage.

Understanding low-context communication

Providing as much context as possible can help decrease confusion and misunderstanding.

Here are a few considerations:

1. The goal of low context is to be **considerate** of the people or audience you're speaking to. It's important to recognize that what you write may be read in the future, or by someone coming into the conversation at a time after the initial thread began.
2. This is one of the more challenging elements to master, particularly for those coming from careers in colocated spaces. In colocated environments, high context communication is the default. High context is less direct with an emphasis on human relations, and it's more sensitive to non-verbals and the feelings of others.
3. Getting oneself in a low context frame of mind can be useful. Start by assuming that recipients of your communication **don't know anything** about the topic, and wish to learn as much as possible as fast as possible.
4. It's easy to imply your experiences with text communication, but remember that not everyone has similar life experiences to relate to, hence the need to be precise.
5. Be specific so that you force yourself to think through what you're saying. Generally, there's value in **taking the time to be deliberate** about communications. Re-read communiques before sending, particularly if they may be perceived as negative or inflammatory. The ability to self-edit before sending is a boon to text communication. Vocalized words cannot be unsaid once uttered.
6. Aiming for precision in communication requires you to put yourself in another person's shoes and **to understand their current perspective**. It's important to view text communication not as a way to impose your will, but as a means to listen, understand, and collaborate.
7. This isn't suggesting that your communication should be cold or clinical. In the GitLab #thanks Slack channel, for instance, we encourage team members to be specific about what they are thanking someone for, such that you don't need prior context to understand how a value was lived.

Why text communication can be difficult

The internet is forever. Words have impact long after they are written, and even when communicating internally, the manner in which you speak with one another should be viewed through an external lens.

For those who struggle with this, consider what you would type if your manager or a family member were in the room observing the conversation. This tip will not serve all scenarios, but it's worth considering if stakes are high in a conversation.

Below are several reasons why text communication can be difficult.

- **Cultural and communication style differences**
- **Delay in immediate feedback due to time zones or other meetings**
- **Lack of non-verbals**
- **Emotional distance**
- **Tough to fully consider the scope of your audience(s)**

It's important that managers lead the way in helping their teams feel comfortable in communicating in this way. Patience, understanding, and positivity should also be encouraged to prevent team members from feeling attacked or misunderstood.

Letting values guide communication

Text communication can be easily derailed, and assumptions can lead to good-mannered communiques being viewed as a slight. Here are useful values to reference if you are unsure how to communicate through text:

- **No ego:** Don't defend a point to win an argument or double-down on a mistake.
- **Assume positive intent:** If a message feels like a slight, assume positive intent while asking for clarification.
- **Get to know each other:** Building a rapport enables trust.
- **Say thanks:** Taking every opportunity to share praise creates a climate where feedback is viewed as a gift rather than an attack.
- **Kindness:** It costs nothing to be kind, even if you don't believe someone deserves it.
- **It's impossible to know everything:** You can't know how your words are interpreted without asking.
- **Short toes:** GitLab is a place where others can feel comfortable with others contributing to their domains of expertise.

If, during a text conversation, you feel that someone is not communicating in the spirit of a company's values, respectfully ask if they believe that they are in a 1-1 setting. It's easiest to assume the worst and quietly disengage, but doing so creates several additional problems. One, the person communicating isn't given the gift of feedback, so their perspective will not change. Two, the person concerned remains timid about communicating with someone, which can lead to toxicity and dysfunction if unaddressed.

Asynchronous communication

In a world dictated by calendars and schedules, people are conditioned to operate in synchronicity—a manner in which two or more parties exert effort to be in the same place (either physically or virtually) at the same time. Asynchronous communication is the art of communicating and moving projects forward without the need for additional stakeholders to be available at the same time your communique is sent.

In a remote setting mastering asynchronous workflows is vital to avoiding dysfunction and enjoying outsized efficiencies. Increasingly, operating asynchronously is necessary even in colocated companies, especially when multiple time zones are involved.

Mastering the art of communicating asynchronously has a prerequisite: documentation. At its core, asynchronous communication is documentation. It's delivering a message in a way that doesn't require the recipient(s) to be available — or even awake — at the same time.

If your organization has no standardized method of documentation, establish that first. Otherwise, team members will be left to determine their own methods for communicating asynchronously, creating a cacophony of textual noise which is poorly organized.

In a remote setting mastering asynchronous workflows is vital to avoiding dysfunction and enjoying outsized efficiencies.

Creating good habits

Asynchronous communication means receiving information when we can handle it—usually not "live." This is important, since most people need head space to focus on what they do.

The first step in creating an atmosphere where colleagues are comfortable working asynchronously is to avoid the mentality that meetings are necessary. By making meetings optional, recording and documenting everything, diligently following agendas, and leveraging the right tools, remote companies are less reliant on being online at the same time.

This mentality must be actively reinforced. For example, in team social calls where dozens of people join a video chat to bond as a team, an agenda allows those who cannot make it to add shout-outs or discussion points that others can verbalize. This is an intentional approach to not only working asynchronously, but also socializing asynchronously.

Minimize interruption by setting up a "preference list" for how to contact your remote team. Asynchronous also refers to the fact that you're not expected to immediately respond if, for example, a colleague or even your boss emails you on the weekend. Just reply on Monday. Likewise, if something is urgent, team members can ping someone on chat whenever—that's how team members can filter through information to know whether something is urgent.

[Asynchronous] allows you to reorganize the company in a divisional organization more easily and embrace remote working even if you're colocated. Everything that works in an async fashion can also work sync but not vice-versa.
— **Leonardo Federico**, co-founder at Sametab

Meetings

Have as few mandated meetings as possible. The notion of "optional meetings" is absurd to those who only think in terms of synchronous communication—you're either at a meeting to contribute, or you aren't. The beauty of asynchronous is that team members can contribute to meetings that occur while they sleep.

Meetings are more easily made optional when each one has an agenda and a Google Doc attached to each invite. This allows people to contribute questions/input asynchronously in advance, and catch up on documented outcomes at a later time.

The person who called the meeting is responsible for contextualizing the outcomes. By placing this burden on the meeting organizer, it acts as a filter for whether a meeting is truly necessary. That's a big responsibility, which keeps the quantity of meetings in check.

Plugging the knowledge leak

Asynchronous companies should implement a low-context culture so that communication is precise and direct. Team members forecast what questions may be asked and add in as much context as possible in its delivery. By assuming that the recipient is asleep, or perhaps doesn't even work at the company yet, this added context removes ambiguity and decreases the likelihood of misinterpretation.

This may feel inefficient, as communiques may take longer to compose. However, the long-term benefits are remarkable. At GitLab, we have years of documented decisions loaded with context. This enables new hires to sift through archives to understand what went into a decision.

As companies scale, people will come and go. By utilizing asynchronous communication, an organization is able to retain knowledge throughout these natural cycles.

Asynchronous companies should implement a low-context culture so that communication is precise and direct.

Informal communication

In colocated environments, informal communication is naturally occuring. When individuals are physically located in the same space, there are ample opportunities to chit chat and carry on conversations outside of formal business settings. Making social connections with coworkers is important to build trust within your organization. One must be intentional about designing informal communication when it cannot happen more organically in an office.

Informal communication is important, as it enables friendships to form at work related to matters other than work. Those who feel they have genuine friends at work are more likely to enjoy their job, perform at a high level, feel invested in the company, and serve others within the organization. For remote companies, leaders shouldn't expect informal communication to happen naturally. There are no hallways for team members to cross paths in, no carpools to the office, etc.

In a remote environment, informal communication should be formally addressed. Leaders should organize informal communication, and to whatever degree possible, design an atmosphere where team members all over the globe feel comfortable reaching out to anyone to converse about topics unrelated to work.

At GitLab, we rely heavily on video calls and encourage everyone to connect and bond as empathetic beings with interests, emotions, fears, and hopes—not just colleagues. We recommend everyone at GitLab dedicate **a few hours a week** to having social calls with anyone in the company.

We do this in a few different ways:

COMPANY CALL

A company-wide video call where team members can join discussion groups on a wide range of topics. To make this meeting easier across time zones and to encourage participation, we have these meetings multiple times per day.

GROUP CONVERSATIONS

Four times a week, the company gets together virtually to discuss an area of the business. Slides are provided for context but not presented.

COFFEE CHATS

Instead talking around a coffee maker in a breakroom, schedule these one-on-one meetings on a video call at a time of your choosing. The Slack app Donut can randomly choose a coffee partner to facilitate introductions.

COWORKING CALLS

These video calls are scheduled working sessions where team members can work through challenging tasks with a coworker, or simply hang out while each person works on their own tasks.

SOCIAL HOURS

Informal social calls organized within immediate teams to get to know each other on a more personal level.

SLACK

Use Slack channels for informal communications throughout the company, whether it's a team-specific channel, a channel dedicated to a specific hobby (like video games or cooking), or even sharing cute pet photos.

ZOOM

Visual engagement helps us relate to each other on a more personal level. In fact, when our team members meet face-to-face for the first time, the most surprising factor is usually each person's height.

Devote time to fostering relationships

If you've spent any length of time in a corporate setting, you've probably seen a company institute a regular "happy hour," to gather employees to converse about topics unrelated to work. In remote environments, there should be a greater emphasis on dedicating time to building bonds.

Remote teams can have informal social calls organized within immediate teams to get to know each other on a more personal level, such as a “show and tell” call or a “happy hour” to chat about weekend plans.

Leaders shouldn’t expect informal communication to happen naturally. Organize informal communication and design an atmosphere where team members feel comfortable reaching out to anyone to converse on non-work related topics.

Using emoticons, emoji, and stickers can supplement the lack of human nonverbal cues in a computer-mediated environment. The results show that proper use of emoticons, emoji, and stickers, especially positive emoticons, is conducive to both relationship formation and cognitive understanding. They not only help participants express emotions and manage interrelations but also function as words to aid message comprehension.

— **Ying Tang and Khe Foon Hew**, researchers at the University of Hong Kong

Using emojis to convey emotion

Though emojis have commonly been reserved for personal conversations that occur outside of the workplace, remote employees should feel comfortable using them in everyday discourse with team members.

Perception has shifted on using emojis in professional settings. In Slack alone, over 26 million custom emojis have been created since the feature was introduced. In all-remote settings, where you may never meet a colleague in person, leveraging visual tools to convey nuance in tone, emphasis, and emotion can lead to more empathy and a tighter human connection.

Emojis can create a more inclusive communication environment. When you're working with colleagues where the business language isn't someone's first language, more universal indicators (e.g. "eyes" for "I've seen this" or "smile" for positivity) can reduce the mental burden of deciphering a message.

Tools for effective communication

Remote communication works best when there's company-wide alignment on how and where to input communication. Leaders should carefully select their tools, aiming to direct communications to as few channels as possible.

A common frustration in large organizations—regardless of what stage of remote they're in—is the chaotic splintering of communication. Projects frequently end up strewn across email, chat, text messages, unrecorded meetings, Google Docs, etc. While there are a litany of unified communication tools available to wrangle all of that, you're best served by choosing a single system for communicating progress.

At GitLab (the company), that destination is GitLab (the product). Any side conversation that occurs in a meeting is documented in an agenda, and the useful elements are contextualized and ported to relevant GitLab issues and/or merge requests. The same goes for side conversations that happen in Slack or email. Relevant portions are ported over into GitLab (the product), which is the single source of truth for any ongoing work.

If your team isn't able to commit to learning a new tool, like GitLab, you can rely on Google Docs to document decisions, create agendas, and store notes.

Since remote communication often relies heavily on text, some team members may feel uncomfortable with their writing. Grammarly is a good tool for those who want to feel more comfortable drafting written communication in English (American or British). There is a free and premium version.

Key takeaways

1. Documentation is an everyday task.
2. Implement a low-context culture so communication is concise and direct.
3. Use emojis liberally to foster a more inclusive environment.
4. Standardize your communication tools and uses to prevent the splintering of communication.

DO

- Record discussions and obtain transcripts
- Assume positive intent
- Default to over communication
- Set a standard for unified communication tools

DON'T

- Rely on synchronous communication methods
- Assume team members have the all the facts
- Pressure team members to respond to questions or complete tasks that aren't time sensitive

Establishing a remote company culture

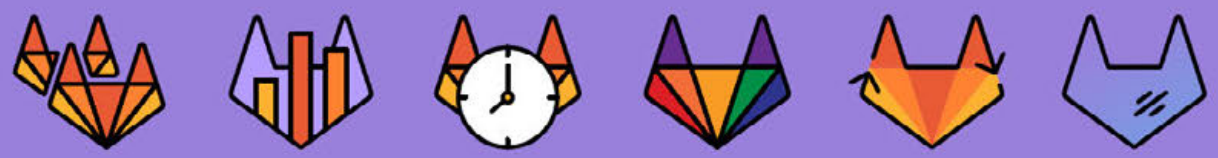
Culture comes in two forms when you're working remotely: workplace culture and personal culture. It's important to maintain a stable sense of both while working remotely.

Culture is driven by values

To be effective, and to impact culture in a meaningful, sustainable way, values must be more than words written on a page. Apathy towards company values leads to cultural degradation and dysfunction. Values can only shape an organization if they're respected and lived by each team member.

This is particularly meaningful in an all-remote setting. With less physical interaction, there's less buffer to compensate for indifference towards company values. Team morale is closely linked to the overall respect given to values.

An overarching belief in a company's values contributes to less ambiguity in decision making. Respected values serve as a universal north star, aligning team members on how to address any challenge or disagreement, even when there's debate related to approach or outcome.



Sustaining workplace culture

"How do you build and sustain culture in a remote environment?" or "How does culture work remotely?" are questions we frequently hear at GitLab. In co-located settings, culture is often implied, built from how team members treat one another, what is rewarded, what is chided, and what is deemed acceptable during in-person interactions.

Building a culture across a company where there are no offices requires intentionality. While technology and tools are enabling companies to operate efficiently in a remote setting, it's important to focus on documenting culture first, then using tools to support.

NO UNWRITTEN RULES

There should be no unwritten rules in remote culture. Intentional documentation is essential to avoiding dysfunction within a remote company, and this also applies to culture. At GitLab, this begins with our company values: Collaboration, Results, Efficiency, Diversity & Inclusion, Iteration, and Transparency. If you'd like to borrow them while your company is in a remote situation, feel free to adopt and adapt them to your needs.

REINFORCING YOUR VALUES

Whatever behavior a company rewards will become the company's values. Even when operating remotely, new hires and promotions serve as important decisions to promote and reinforce values.

GitLab reinforces its values by what:

- Leadership does.
- We select for during hiring.
- We emphasize during onboarding.
- Behavior we give each-other 360 feedback on.
- Behavior we compliment.
- Criteria we use for discretionary bonuses.
- Criteria we use for our annual compensation review.
- Criteria we use for promotions.
- Criteria we use to manage underperformance.
- We do when we let people go.

In negative feedback, one should be specific about what the problem is. For example, saying someone is "not living the values" isn't helpful. Provide actionable feedback, and don't leave any details up to interpretation.

NEVER TAKE CULTURE FOR GRANTED

While culture is easily reinforced when interacting with coworkers all day, every day, it requires intentional work when operating in a remote environment. While the importance of culture is driven home during onboarding, continual reinforcement is required to keep it top-of-mind. It's easy to lose sight of values when focusing on OKRs and key performance indicators (KPIs). However, it's vital for leadership to remind themselves and other team members that values should never be lowered in priority.

If your company gathers team members together on a regular basis (virtual meetings included!), consider resurfacing values or providing opportunities for groups to live out those values through community service. Just as certain training is recommended or required each year as part of a company's ongoing learning and development efforts, reminding team members of values is vital to sustaining a strong culture.

GRATITUDE AND TRANSPARENCY

Persistent negativity can erode culture. While feedback is a gift, there's a fine line between reacting with hope and determination when facing a challenge and allowing a sense of apathy to permeate a company. Leaders should be cognizant and act swiftly if there's a noted drop in outward gratitude or transparency.

PUT STRUCTURE AROUND CULTURE

It may sound counterintuitive, but there's great value in putting process and structure around culture. It's important for leadership to set the tone, but it's even more important to document what will define your culture. Each time a scenario arises where there is no clearly defined answer, look to your values to determine the answer, and then document.

Documentation is a shared benefit, and is something that should be embraced by all members of the organization. While it may feel inefficient to document nuances related to culture, creating good habits ensures that culture is as strong in the future as it was in a company's infancy.

Prioritize mental health

Burnout rarely happens all at once. It typically takes one by surprise, eventually coming to a head after days, weeks, or months of overwork creep. This can happen in remote or in-office environments. Here are some ways to avoid burnout, both for yourself and for your team.

DON'T CELEBRATE WORKING LONG HOURS

Be careful when thanking someone publicly for going above and beyond to not send a message that work should always take priority. While working one additional hour to move a project forward is likely not debilitating when viewed in a vacuum, it can trigger a revised baseline where you must continue to overwork in order to maintain the new status quo.

This becomes toxic when managers fail to recognize that a given sprint shouldn't reset the baseline of what is achievable on an ongoing, sustained basis. It becomes disastrous when team members don't feel safe bringing this up to their managers in a 1:1 setting.

Particularly in a company where results are valued above all, managers should be careful to not assume that results garnered in a given period of overwork are the new norm. This places team members in an unfair scenario where they feel pressured to perpetually overwork in order to meet expectations.

More broadly, as other teams witness this, they will be less likely to go above and beyond in special cases for fear of trapping themselves in a similar cycle of overworking just to meet unsustainable expectations.

DOCUMENT PROCESSES AROUND MENTAL HEALTH

Burnout, isolation, and anxiety are issues that impact team members across all companies, regardless of organizational structure. While they aren't always intertwined, there is significant interplay between them.

In a colocated setting, it's entirely possible for a team member to appear well, but struggle with these issues internally. That said, it tends to be easier for those in an office to reach out to a trusted team member if burnout impacts their ability to thrive in the workplace.

In a remote setting, where in-person interactions are less common, it's easier to fall victim to isolation. This is particularly true for those who are not well acclimated to remote work.

Because team members are likely to work alone, it's more difficult to remember that colleagues are available to call on—especially if someone is already overwhelmed or suffering from anxiety. This reality makes it all the more important for companies hiring remote workers to place a great deal of focus on documenting processes for team members who face these difficulties. Consider offering professional assistance and document resources during onboarding and reinforce options in ongoing learning and development sessions.

Remote workers may feel less comfortable reaching out to a person when experiencing mental duress, so it's vital to ensure that resources are easily discoverable.

HOW TO RECOGNIZE MENTAL HEALTH STRUGGLES

Oftentimes, if someone is feeling burned out, they aren't the only one feeling that way. GitLab team members have compiled a list of symptoms related to burnout. A few are highlighted below.

- You're constantly tired
- You no longer enjoy things
- Your job performance suffers
- Your physical health suffers (headaches, irregular breathing patterns)
- Your relationships are strained
- You feel socially zapped
- You disable video for team calls to prevent others from seeing your pain
- You are perpetually concerned with whether you are doing enough
- You worry that your contributions are too few or too insignificant
- You feel unable to choose family first

Be careful of thanking someone publicly for working overtime. Managers should be careful to not assume that results garnered in a given period of overwork are the new norm.

Remote workers may feel less comfortable reaching out to a person when experiencing mental duress, so it's vital to ensure that resources are easily discoverable.

WORKING TO PREVENT BURNOUT, ISOLATION, AND ANXIETY

Prevention is a team sport. Leaders must work to establish a workplace culture that empowers rather than restricts, managers must be proactive in sensing the signs of mental strain, and team members must feel comfortable surfacing issues while they are still manageable.

Below are several recommendations for avoiding and preventing burnout, according to GitLab team members.

1. Set clear boundaries between work and home
2. Take vacation
3. Take a “mental health day” to lower your stress (spend time outdoors, exercise)
4. Know when to take a break
5. Put a break reminder on your computer
6. Switch off when you're away from work
7. Don't suffer in silence
8. Don't go straight to work after you wake up
9. Remove Slack from your smartphone or at the very least, turn off notifications for it
10. Keep each other accountable. If someone in a different time zone should be asleep, tell them
11. Use your Slack status to share a message with the team that you are unavailable
12. Schedule random coffee breaks

Encourage a healthy remote work lifestyle

Working remotely presents a number of lifestyle benefits, even when abiding by quarantine and social distancing recommendations during the current coronavirus outbreak. By ditching the requirement to be seen in a physical office, team members structure their work around their life as opposed to the other way around. This is a profound shift, and it may not be entirely obvious how to maximize one's new reality.

Consider asking yourself what you'll do with the time you save by losing the commute. Perhaps you'll be inspired to exercise or cook. There's nothing wrong with reclaiming that time and using it to bolster your overall wellness, from improving your sleep habits to furthering your education.

For those accustomed to social interactions within a colocated work setting, it can be jarring to move into a remote environment where you primarily work alone. It's important to pay close attention to your mental health and emotional health. If you sense a void from missing out on face-to-face interaction, act deliberately and early.

Here are three ways to avoid feeling isolated:

1. Schedule breaks to interact with friends/family in your home or nearby in your community. If government restrictions allow, it may be helpful to schedule walks with nearby friends or enjoy a quick board game with your children or significant other.
2. Leverage video to connect face-to-face and serve as a nice break from the quiet of an at-home workspace. Video calls will help you feel connected to your team, friends, and family while staying at home for extended periods of time.
3. Engage with colleagues on non-work topics, via Slack or ad hoc video calls. Foster a sense of connection with others over more than just work, the same as you would in typical “water cooler” conversations.

By ditching the requirement to be seen in a physical office, team members structure their work around their life as opposed to the other way around.

Key takeaways

1. Your reward becomes your values. Build respect for company values by consistently referring back to them when giving feedback.
2. There should be no unwritten rules in a remote culture.
3. Make mental health a priority and make mental health resources easily accessible.
4. Schedule breaks and make time weekly to engage with colleagues on non-work topics.

DO

- Proactively keep good mental health
- Make a list of actions you can take to de-stress or unplug when needed
- Leverage video calls to connect with coworkers on non-work related topics
- Set a status when you’re away from your desk, or block your calendar for time away

DON’T

- Feel compelled to be online at all hours
- Work straight away after waking up
- Leave details up for interpretation
- Be tied to your computer 24/7
- Be afraid to set boundaries with loved ones

Using GitLab for remote collaboration

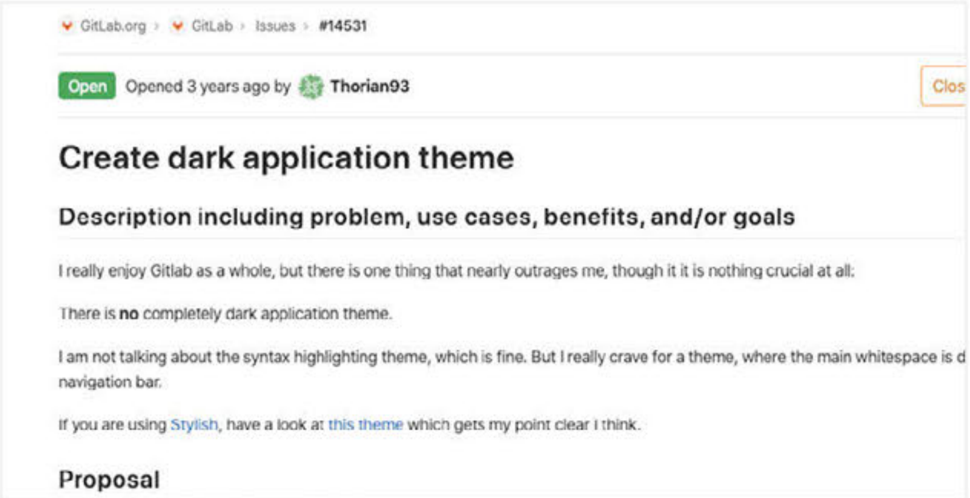
GitLab is a collaboration tool designed to help people work better together whether they are in the same location or spread across multiple time zones. Originally, GitLab let software developers collaborate on writing code and packaging it up into software applications. Today, GitLab has a wide range of capabilities that are used by people in all kinds of companies and all kinds of roles from sales and marketing to legal and customer support.

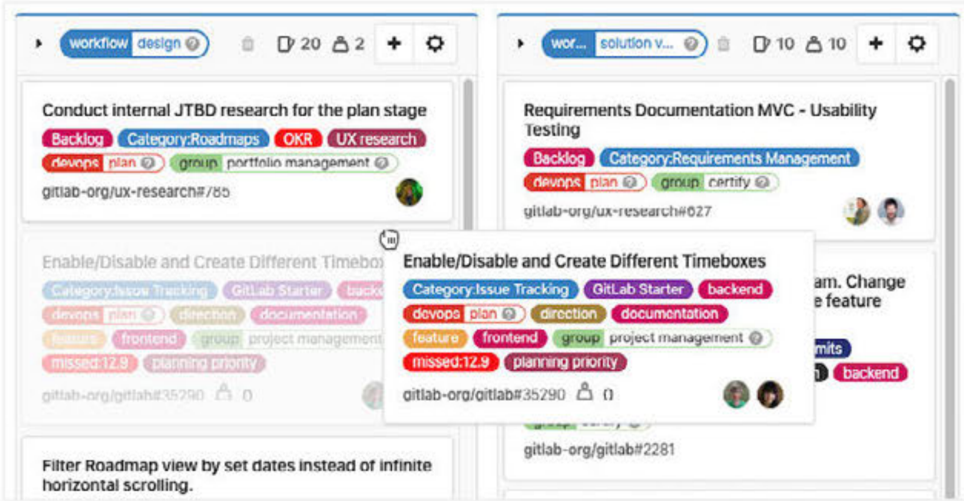
DOCUMENT WHILE YOU WORK

Instead of critical information getting lost in email or chat, writing down what's happening inside of GitLab Issues means the plan, process, and execution are automatically documented. Other users can be tagged to comment and collaborate. Since Issues are a many-to-many channel, it's easy to loop in more folks without the clutter of a reply-all thread.

TRACK WORK FROM DREAM TO DONE

Adding labels to GitLab Issues lets you categorize work into different stages, such as planning, in-progress, and complete. GitLab Boards give you visibility and control over how work is being done. It's like moving digital post-it notes across an online whiteboard that everyone can use, not just the folks in the conference room.



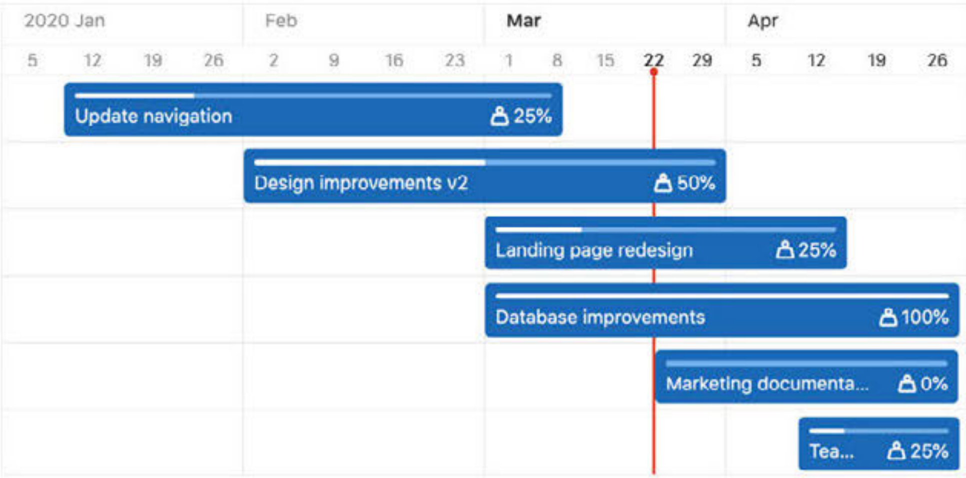


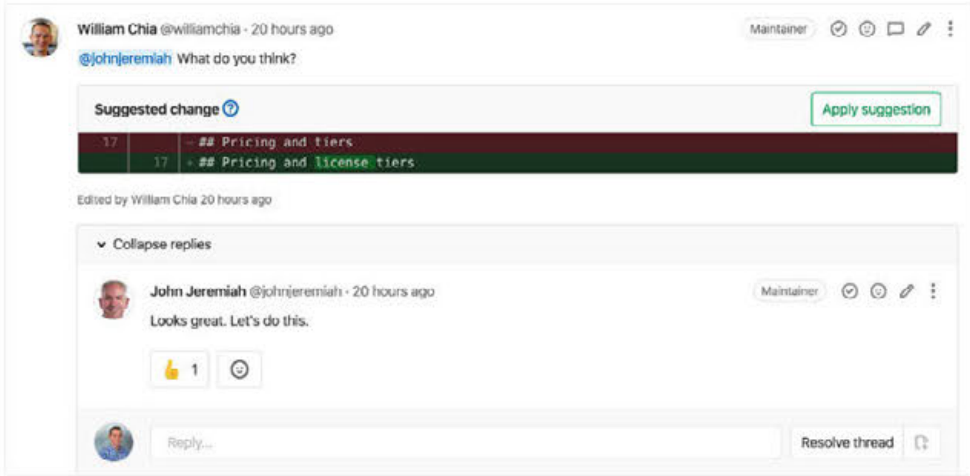
CONNECT STRATEGY TO EXECUTION

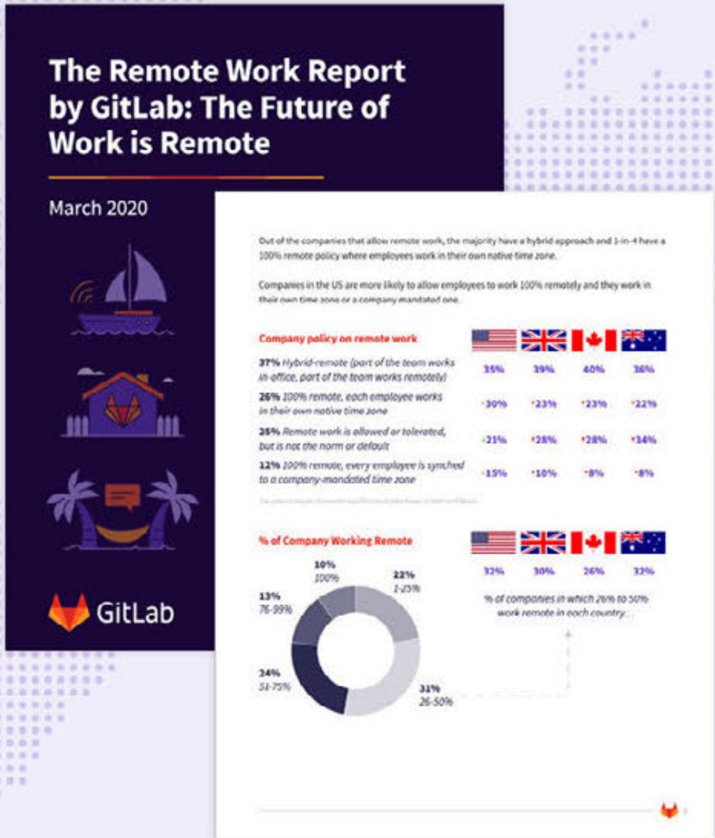
GitLab Epics and Roadmaps provide a way to organize and visualize your entire portfolio of work over the long term. While Issues represent everyday tasks, Epics represent entire features or projects. Roadmaps let you plan work by seeing which work is competing for space and track progress against an assigned completion date.

VERSION EVERY WORD

One of the advanced uses for GitLab is to treat copy like code. You can store, version, review, and approve not only software code, but any text at all. Using GitLab's version control and "code review" capabilities for your text-based copywriting, you'll be able to track versions, know who changed what when, make multiple proposals to the same document, and easily manage approvals.







Get The Remote Work Report

We asked and over 3,000 of you answered. Created to foster innovation, collaboration, and evolution in the future of work, GitLab's Remote Work Report drills down into where we are today and what's needed for tomorrow.

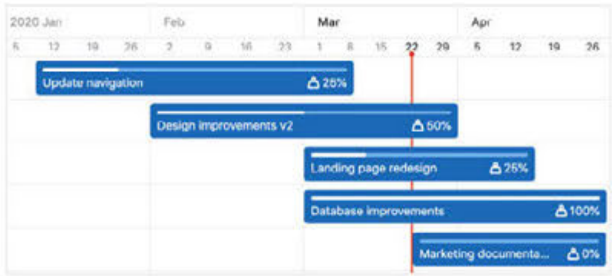
Learn more

GET THE REMOTE WORK EMERGENCY PLAN

If suddenly remote work is the only option, how can you make that happen? We've got all the answers here thanks to a long successful history with remote work. From tools to procedures and BTDT advice, you'll find what you need to dive right in to working remotely.
Learn more

GET THE REMOTE NEWSLETTER

Do you want more remote (and less office) in your life? Sign-up for a biweekly dose of tips, tricks and new remote opportunities.
Sign up



TRY GITLAB FREE

All GitLab features — free for 30 days. GitLab is more than just source code management or CI/CD. It is a full software development lifecycle & DevOps tool in a single application.
Start your trial

About GitLab

GitLab is a DevOps platform built from the ground up as a single application for all stages of the DevOps lifecycle enabling Product, Development, QA, Security, and Operations teams to work concurrently on the same project.

GitLab provides teams a single data store, one user interface, and one permission model across the DevOps lifecycle allowing teams to collaborate and work on a project from a single conversation, significantly reducing cycle time and focus exclusively on building great software quickly.

Built on Open Source, GitLab leverages the community contributions of thousands of developers and millions of users to continuously deliver new DevOps innovations. More than 100,000 organizations from startups to global enterprise organizations, including Ticketmaster, Jaguar Land Rover, NASDAQ, Dish Network and Comcast trust GitLab to deliver great software at new speeds. GitLab is the world's largest all-remote company, with more than 1,200 team members in over 65 countries.

Credits

This guide was built by remote work experts with dozens of combined years of experience across the spectrum of remote. Though GitLab is all-remote, the guiding vision of this work is to educate and equip everyone — regardless of work environment — with best practices. We want you to thrive as a remote worker. Connect with us, contribute your own learnings, and keep being awesome.

GitLab encourages enterprises and individuals to share this resource with others, and use these helpful materials in whatever way helps them the most.

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