

Invitation to Tender for Consultancy Services (ITT) under a Restricted Procedure: Note to Contracting Authority

The template Invitation to Tender (ITT) and Instruction to Tenderers in the file *ITTS1.doc* are to be used for the procurement of technical or archaeological services for publicly funded construction projects under the restricted procedure using either the Standard Conditions of Engagement for Consultancy Services (Technical), or the Standard Conditions of Engagement for Archaeological Services. (A separate template is provided for open procedure competitions.)

Italic text shaded in green is not to be included in the ITT or Instructions when issued for a competition. The area shaded in green in the Invitation to Tender letter and in section 8.3.

Text shaded in grey is given as default text, as examples or prompt text as examples, and may need to be changed or deleted altogether depending on the particular requirements of the project. The areas in grey are sections 1.1; 1.3(d); 2.5; 4.1 and 4.2.

The ITT and Instruction to Tenderers are provided as a Microsoft Word form, in which the standard text is protected, and the project-specific details are completed by the Employer prior to issuing the ITT and Instructions.

The documents to be issued are:

- The Invitation to Tender letter
 - The Instructions to Tenderers (including the Particulars and Appendix 1), completed and amended as required
 - Form of Tender and Schedules A and B, completed
 - Any documents listed as being contract documents in 1.7 of Schedule A to the Conditions.
 - Bespoke form of collateral warranty for sub-consultants(if applicable)
 - Other documents listed in “Tender Documents” in the Particulars which are stated not to form part of the contract
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How to Edit the Template ITT and Instructions to Tenderers

Using the file

The template ITT and Instructions to Tenderers are presented as a protected Microsoft Word form – this enables you to tailor the ITT and the Particulars in the Instructions to Tenderers to the specific needs of the project. You are, however, prevented from changing the standard text in the document.

When you have completed the document with the details of your project, you can either print it out and issue it to the Candidates, or issue it electronically to Candidates.

How to complete the form

Use Microsoft Word to open the document.

Use the scroll bar to move through the document on the screen.

When you click on any part of the document, the cursor is automatically positioned at the next point at which editing is permitted.

You can move between editable fields by pressing the TAB key.

Editable fields are of two kinds:

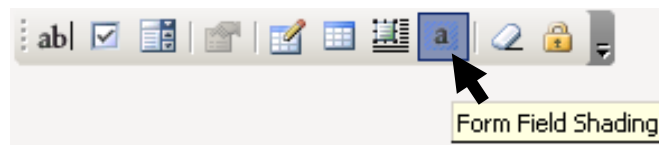
- **Text fields**, into which you may insert the appropriate text or number. If the field has a default value, this is shown, but it may be altered to suit the particular circumstances of the project. In some cases, the field is shown with a prompt indicating the type of information required – the prompt should be deleted in its entirety when the information is supplied;
- **Drop-down fields**, in which you must choose from a range of alternatives. Again, a default value may be shown.

Note that you cannot change the formatting of a form field.

Form Field Shading

Use Form Field Shading to make the editable fields more visible on screen. To turn on Form Field Shading:

1. Choose **View | Toolbars | Forms** to display the Forms toolbar.
2. Click the **Form Field Shading** button.



With Form Field Shading turned on, all the editable fields are displayed in grey. This is for display purposes only – the shading does not appear when the document is printed out.

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How to Edit the Template ITT and Instructions to Tenderers, continued

Find Function You cannot use the Find function for a word search with Microsoft Word form in which the standard text is protected

Saving and printing your document When you have edited a document, you should save it to a suitable location on your hard disk or server.
Print out the document in the normal way.

Issue of documents The Form of Tender and Schedules A and B attached can be issued electronically, by post, by courier or by collection. Whatever method is used a written record in the form of a receipt should be retained.

Tailoring the Instructions to the Needs of the Project

Introduction In the Instructions to Tenderers, some clauses may be changed to suit the needs of the project. The clauses that can be changed are shown below, by number and name, with explanation of the valid changes. This note does not include any instructions in relation to filling the Particulars which it is felt are self explanatory

1.1 This procedure Delete first sentence if a contract notice does not have to be sent for publication in the OJEU

1.3 The Contract Include other condition presidencies as applicable

2.5 Other Other modes of communication between the Candidate and the Employer can be added here, such as:

- an information day for Candidates;
- technical consultation (e.g. on variant tenders)
- providing access to view existing structures to enable Consultants gauge resource requirements that might be required so as to price them into their tenders.

3.4 Sub-Consultant's collateral warranty There is no standard form of Collateral Warranty for sub-consultants, so if required by a Contracting Authority a bespoke version should be developed, or a suitably amended standard form should be used.

4.1 The Services The services can be set out in Stage Services Schedule B of the Conditions or on a separate page (scope of services) in Schedule B. The detailed scope of the services specified on a separate page should be linked and cross-referenced to Stage Services in Schedule B for the project.

4.2 The Project Further details of the project can be inserted at section 4.2

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Tailoring the Instructions to the Needs of the Project, continued

5.7 Notional Capital Value

The notional capital value should represent a notional overall project value, rather than just taking account of the value of the elements of the project relevant to the Services. For example, if the Services are mechanical & electrical engineering services, the notional figure should not reflect only the mechanical and electrical elements of the subsequent works, but the notional total value of the entire works which would include all building or civil engineering work including mechanical and electrical works.

5.14 Deposits

The deposit should only cover the cost of reproducing and issuing the document including overheads such as labour, material, reproduction costs, postage etc. The deposit should not be set so high as to be a deterrent to open competition.

8.3 Abnormally low tenders, abnormally high or low rates or prices

Care should be exercised regarding the rights reserved by this section 8. In most cases, it is expected that Candidates will be best judge of their own costs. This statement shaded in grey must be deducted from the Instructions to Tenderers before they are issue to Candidates in the tender competition.

9.1 Marking award criteria

Include other condition presidencies as applicable

9.4 Review

The marking of sub-criteria under each criterion for quality must be consistent with the total marks for that criterion and also the total marks for all criteria must be consistent with the overall total quality mark.

Negative marking for price should not be used. Tender prices that are double or more than the lowest *bona fide* tender price should receive zero marks.

10.3 Letter of intent

Other requirements may be added to requirements in Letter of Intent.

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Tailoring the Instructions to the Needs of the Project, continued

10.4 Letter of Acceptance

Written clarifications of a tender that are to be included in the contract will be referred to in the Letter of Acceptance. Care should be taken to ensure that clarifications that will be in the contract are appropriately drafted. Furthermore only those that have contractual significance should be included in the contract.

Particulars

In relation to the opening paragraph of the Particulars care should be exercised to ensure that there is no discrepancy between details in Schedules A and B and the details in the Particulars
