

# Invitation to Tender (ITT) and Instructions to Tenderers for Public Works Investigation Contract under Open Procedures (ITTW3): Note to Employers

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The ITTW3 Invitation to Tender (ITT) and ITTW3 Instructions to Tenderers are to be used for investigations that are to be procured under the open procedure. (ITT W1 should be used where it is proposed to use a restricted procedure for the award of the investigation contract.)

The ITT and ITTW3 Instructions to Tenderers are provided as Microsoft Word forms, 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 the Appendices), completed and amended as required
  - Form of Tender and Schedule, with part 1 of the Schedule completed
  - Form of Bond and Form of Appointment of PSCS, as required
  - Suitability Questionnaires for the contractor, for each required specialism and for PSCS
  - Documents detailing the scope of the investigation, including specifications, drawings, and Bill of Quantities
  - Any other information listed in Appendix 2 to the Instructions.
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# How to Edit the Template ITT and Instructions to Tenderers

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## Using the file

The template ITT and Instructions to Tenderers are presented as protected Microsoft Word forms – 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 documents with the details of your project, you can print them out and issue them to the prospective Tenderers or issued electronically to Applicants.

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## How to complete the forms

Use Microsoft Word to open the documents.

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

When you click on any part of the documents, 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.

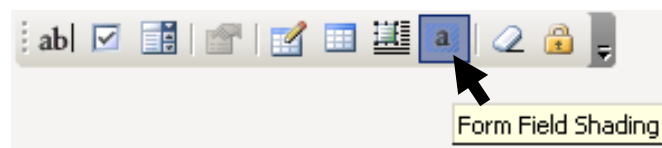
Note that you cannot change the formatting of a form field.

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## 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

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### **Saving and printing your documents**

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.

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### **Find Function**

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

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### **Issue of documents**

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

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# Tailoring the Instructions to the Needs of the Project

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## 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 in the blank spaces in the Particulars as these should be self explanatory.

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## 1.1 This procedure

Delete following text in first sentence “*and where appropriate a similar notice has been simultaneously sent to the Office for the Official Publications of the EC for publication in the Official Journal of the European Union.*” if a contract notice does not have to be sent for publication in the OJEU

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## 1.2 These documents

Specify the documents included with these Instructions that describe the scope of the investigation, including specifications, drawings and bill of quantities.

With regard to Suitability Questionnaires, specify each particular Suitability Questionnaire being issued, including Suitability Questionnaires for competence as project supervisor and as contractor.

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## 1.3 The Contract

Specify the documents included with these Instructions that describe the scope of the investigation, including specifications, drawings and bill of quantities.

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## 4.10 Project Supervisor

In the case of PW-CF7 the Model Form for “Appointment of Project Supervisor” attached to the Conditions should be included in documents issued at tender documents. As regards PW-CF8 while there is no specific reference to Project Supervisor in the contract if the role is to be filled by the successful tenderer then the Model Form attached to PW-CF7 for “Appointment of Project Supervisor” should be used. Furthermore, a blank copy should be included in the tender documents issued to all interested parties tendering for the contract.

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## 4.7 Value Added Tax

The Bill of Quantities should include a schedule of items that are not construction operations subject to Relevant Contracts Tax (and therefore to the reverse-charge VAT).

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## Completing the Particulars

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The Particulars of the Tender should be completed as shown. Any prompts within the form fields should be deleted before these Instructions are issued.

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## Completing Appendix 2 to Instructions: Additional Information

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### **Additional Information to be Submitted with Tender**

The items shown as default will be included when a bond is required.

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## Completing Appendix 3 to Instructions: Information Pack

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### **What is in the Information Pack?**

The Information Pack is information that the Employer wishes to give to Tenderers for information, but not include in the Contract. It should include the preliminary safety and health plan (which must be issued to Tenderers if the winner is to be PSCS), and may include copies of statutory consents such as an environmental impact statement. It might also include site information that the Employer does not want to become part of the Works Requirements.

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