

Invitation to Tender (ITT) and Instructions to Tenderer using the Restricted Procedure for Term Maintenance and Refurbishment Works Contracts: Note to Employers

The template Invitation to Tender (ITT-W6 Invitation to Tender) and Instructions to Tenderers (ITT-W6) are to be used with the Term Maintenance and Refurbishment Works Contracts.

The Invitation To Tender is a Microsoft Word document that can be printed on Employers headed paper. The Instructions to Tenderers is 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 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
- Completed Works Requirements (Volume A)
- Form of Tender and Schedule, with Schedule completed (Volume B)
- Unpriced Pricing Document (Volume C).

Other documents that may be required are:

- Any other information listed in Appendix A to these Instructions.
 - Form of Appointment of PSCS, as required
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How to Edit the Template ITT and Instructions to Tenderers

Using the file

The Instructions to Tenderers are presented as a protected Microsoft Word form – this enables you to tailor 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 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:

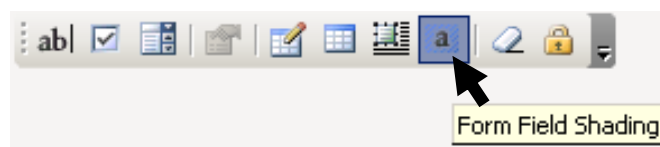
- **Text fields**, into which you may insert the appropriate text or number. If the field has a default value, this is shown, but it may be altered to suit the particular circumstances of the project. In some cases, the field is shown with a prompt indicating the type of information required – the prompt 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,

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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.

Find Function

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

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.

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

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

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

- an information day for Candidates.

5.8 Pricing If there is a Bill of Quantities, one or both of the optional clauses may be included. Delete any clause that does not apply. Insert the relevant percentage in any clause that does apply.

5.9 Value-Added Tax The Pricing Document should include a schedule of items that are not construction operations subject to Relevant Contracts Tax (and therefore to the reverse-charge VAT).

5.11 Change Specialist If Specialists are not required the default text in Section 5.11 ‘Not Applicable’ should be inserted.

5.12 Project Supervisor Include Standard Form for Appointment of Project Supervisor Construction Stage (included under PW-CF11) in Works Requirements if required.

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Tailoring the Instructions to the Needs of the Project, Continued

8.3 Abnormally low tenders, abnormally high or low rates or prices Employers should exercise with caution the rights reserved by this section. In most cases, it is expected that Candidates will be the best judges of their own costs.

9.4 Review This or similar text can be used if the sanctioning department or agency has a mechanism for reviewing decisions on tender compliance. If they have, the name and contact details of the Sanctioning Authority need to be included.

10.3 Letter of intent or Letter to Successful Tenderer Other requirements may be added.
