Issue Documents

This section of the Procurement Journey provides guidance about the tender stage of the procurement process.

If you are using a two-stage process e.g. a Restricted Procedure, you will already have assessed the Selection Stage documentation. From this you will have determined the bidders you will be inviting to tender.

If you are not using a two-stage process, you will issue an Invitation to Tender (ITT) which will include the Selection and Award stage criteria.

It is considered best practice to use **PCS-Tender** if you have access to it. PCS-Tender helps you manage tender administration.

Bidder Communications

A Bidders' Meeting is where all tenderers are invited to discuss the ITT at the same time. This can happen before or after the ITT is issued.

The purpose of the meeting is to highlight and clarify aspects of the ITT. Commercially sensitive information should not be shared e.g. it may be inappropriate to reveal project/budget information.

Checklist

Checklist

The meeting should:

Event	Actioned?
Start by setting out the agenda and introducing the personnel involved	
Follow with a presentation, setting out the aims of the procurement process and the expected business benefits	

If appropriate, hold a facilities/site tour	
End with a question and answer session	

Blank rows are provided for your use e.g. to add additional checklist items.

You must make sure that any Bidders' Meeting(s) that you organise are fair to all those who are interested in tendering for your contract. The content of the meeting must be transparent and available to all. As an example, all of the questions raised and answers provided should be confirmed in writing and sent to all bidders whether they attended the meeting or not.

Sufficient time must be allowed for bidders to take account of the Bidders' Meetings. As a result the ITT closing date should be set a reasonable period after the Bidders meeting. This will allow bidders time to incorporate what they have learned into their bid.

Bidders can take notes of the proceedings.

A Bidders' Meeting will not be necessary for every tender exercise. A judgment will have to be made, prior to the issue of the ITT, whether or not such a meeting is required. If it is required it must be planned into the procurement timetable.

ITT Extensions

Open or close

When an ITT is issued near to the closing date, the bidders should be made aware it is closing soon.

Changes to a tender closing date should be made if:

- Significant changes are made to the tender documents and/or;
- Information requested by a bidder in a timely fashion has not been supplied.

Extension to a tender time limit should be proportionate to the complexity of the change and /or the additional information being provided.

You must receive the necessary approval to proceed with a tender extension. This approval must be in accordance with your internal governance procedures.

If the date is amended, the new date should be notified to all tenderers. If any tenderer has already submitted a bid they should be given the opportunity of withdrawing their original bid. They can then submit a revised bid in line with the extended deadline.

ITT Q&A's

Open or close

Communications with all parties during the procurement activity should be coordinated by you.

You must ensure all communications between bidders and your Organisation are fair and transparent. For example, for any bidder question submitted your answer must anonymise the question and circulate your response to all of the bidders involved in the process.

You should provide details in the ITT documentation of :

- The deadline for bidders to submit questions;
- When you will respond (target timescales).

The use of an electronic tendering system, for example **PCS-Tender**, will facilitate the receipt and circulation of questions and answers. **Public Contracts Scotland** offers similar functionality via the bulletin board.

If you do not use an electronic system, clear instructions and contact details should be provided to the bidders within the ITT documentation.