Invitation to Tender

The activities at this stage must be carefully managed to support the Principles of Procurement.

As a minimum processes must be undertaken in a transparent manner, ensuring no market place distortion.

The procurement process cannot unduly favour or disadvantage a supplier. It is your responsibility to ensure these requirements are met.

Access to the ITT and any related documents should be non-discriminatory, generally available and free of charge.

Quickfire Guide

Quickfire Guide

Invitation to Tender Document Contents

Quickfire Guide Links to content

A quickfire guide for the sections you should include in your ITT, where relevant to your procurement.

Availability of Invitation to Tender Documents

Open or close

When using a two stage process, documents will only be made available to bidders who have passed the selection stage. Invitations to submit a tender should be issued simultaneously to all bidders and in writing.

If you are not using a separate selection stage, ITTs should be issued on request to any interested supplier. This can be at any point prior to the tender submission date

set.

Where ITT documents cannot be issued electronically (for example because the information is sensitive or the contract is of a nature that requires specialised tools and/or files) then you can use other means to issue the documents. If you do this, it would be good practice to increase the tender time limit by five working days to allow for this extra process.

Evaluation Criteria, including Financial Criteria

Open or close

The evaluation criteria and weightings must be published within the Contract Notice. For more information refer to **Selection, Award & Exclusion**.

Price/financial evaluation criteria should include:

- Whole Life Cost comparisons
- Quantifiable financial benefits arising from the technical evaluation (e.g. speed, fuel or electricity consumption, coverage, shelf life, etc.)
- Fixed or variable pricing
- Cost of components, spare parts, consumables and servicing
- Life-cycle costing where appropriate.
- Risk analysis and financial appraisal (for major contracts of strategic importance, especially those of an innovative nature).

To support this process, as you are developing the documentation you will draw information from the **Develop Strategy** stage of the Procurement Journey.

It is best practice to agree the evaluation criteria with the User Intelligence Group (UIG). These criteria will identify which eligible tenderer(s) will deliver best value for money for the organisation, based on the Most Economically Advantageous Tender (MEAT).

You should identify the Most Economically Advantageous Tender, assessed on the criteria linked to the contract's subject matter. This should include price or cost evaluation using a cost effectiveness approach. A cost effectiveness approach may include Life Cycle Impact Mapping

It is important to differentiate between Whole Life Costing and Life Cycle Costing and further information on both an be found in **Additional Resources.**

Lifecycle Impact Mapping

Focuses on social and environmental impact rather than cost.

Life-cycle impact mapping helps you identify and assess impacts. For example, you may focus attention on the disposal phase before beginning the procurement. This then allows you to build end-of-life management requirements into performance clauses and internal management procedures.

Please note: Life-cycle impact mapping can be used alongside life-cycle costing as part of the procurement process.

Other considerations for ITT documentation

Open or close

You may wish to consider the areas below for inclusion within the ITT documentation:

- e-Commerce: e-Capability, e-Procurement Information, e-Auctions, etc.
- Contract implementation/contract and supplier management information
- Proposed implementation plan
- Management information - requirement to provide line item detail
- Roles & Responsibilities
- Key Performance Indicators (KPIs)
- Mini-competition guidance: details of process to be followed for call offs

Invitation to Tender

Open or close

The ITT or the Invitation to Confirm Interest should include comprehensive information for potential bidders about the requirement being tendered. While there are a number of **Generic Documents** listed below that will require insertion into all

packs (e.g. a reference to the relevant Contract Notice or Award Criteria weightings) some of the content will naturally be specific to each requirement and you should select those that you need to include in the ITT pack from the list below:

- A reference to the relevant Contract Notice, previously published
- Instructions to bidders including the tender submission deadline; address to which the tender submission is to be sent and the language which the tender submission must be submitted in
- It is good practice to issue an SPD to bidders. For more information, please refer to **Selection Criteria** and **SPD**
- Award Criteria weightings
- For services contracts, if deemed applicable, you should ask the bidders to indicate any share of the contract that the tenderer may subcontract and information about the subcontractors including their name and contact details. You may request separate SPD responses from subcontractors and consortium members, when deemed appropriate, in order to safeguard the effective delivery of the contract, based on relevance and proportionality to the contract
- For contracts which may be extended, the nature, quantity and, where possible, the estimated time for exercising options
- For supply or service contracts, the nature, quantity and, where possible, estimated publication dates of notices of future tenders
- If applicable to the contract, the delivery of supplies commencement or termination date(s)
- The address of the Organisation who will award the contract
- Economic and technical conditions, financial guarantees and any information required from bidders
- The form of the contract to be used e.g. purchase, lease, hire-purchase, or a combination
- If electronic access to the relevant Procurement Documents cannot be offered the address and deadline date for requesting Procurement Documents and the language(s) to be used
- Background and overview of the tendering and evaluation process including details of presentations and site visits, if applicable
- Terms and Conditions which will apply to any resulting contract with the principle supplier
- Specification and technical requirements

- Sustainable Procurement Duty requirements e.g. economic, social and environmental considerations including community benefits and Fair Work Practices. See **Sustainable Procurement Tools**
- Cyber Security Requirements (example ITT and Contract Notice wording when using the **Cyber Security Procurement Support Tool**)
- Quality questionnaire

The activities at this stage must be carried out in a carefully managed manner that support the **Principles of Procurement**. It is the responsibility of you and your Organisation to make sure these requirements are met.