

Template Preparation Guide:

Invitation to Tender (ITT) Template

Fall 2017
saskbuilds.ca



INTRODUCTION

This guide is intended to provide information and support to public entities in the development and use of Invitation to Tender (ITT) Template, updated Fall 2017.

Current templates are available through the SaskTenders, SaskBuilds and Crown Investment Corporation websites. The terms and conditions contained in these standard templates are regularly modified to reflect changes in legislation, contracting practices or procurement law. Public entities should ensure that the most recent versions of the templates are used.

The ITT template contains important areas that need to be well developed in order to create a strong document that is easy for suppliers to understand and respond to, and for the evaluation team to review. This guide will lead you through the process of completing the ITT template.

This document will provide guidance referencing the specific sections of the template that require input of information or data.

The template is a starting point for the creation of a customized procurement document. The intent is that you will customize the template to match your specific competition by inserting the additional information directed in the template instructions. The intent is also to maintain a common look and feel for government competitions.

Other useful documents to be referenced are the Procurement Guide and the Scope of Work Writing Guide.

IMPORTANT NOTE:

This template is the correct template if you:

- Intend to evaluate compliant bids solely on a low price basis
- Intend to make all requirements and specifications mandatory
- Intend to create a Contract A with the proponents submitting bids
- Intend to have bids be irrevocable
- Do not intend to conduct negotiations after award

Part 1 – Invitation and Submission Instructions

1.1 Invitation to Proponents

The introduction should provide an overview of the project so that suppliers will understand the business problem or need that exists and be able to quickly determine if they ought to pursue the contract. Be sure to include the name of the public entity that is requiring the good or service, and the desired length of the contract including any option years.

Mandatory requirements, such as qualifications and specifications should be included in the introduction. If there is a long list of mandatory criteria you may want to refer to Appendix A “ITT Particulars” for details.

You should include an overview of the deliverable and any special/unique requirements are to be included in this section as well.

The introduction often appears in the synopsis or overview section on the SaskTenders website when posting the ITT.

The first paragraph requires the input of a “title of ITT” this should match the title listed on the front page of the template.

1.2 ITT Contact

Insert the name and email of the ITT contract

1.3 Type of Contract for Deliverables

This section will specify how many possible agreements could be awarded based on this competition. It will also detail the period of the agreement, including any option years.

1.4 ITT Timetable

Insert the applicable dates for the ITT milestones. Insert additional dates for any additions steps in your procurement process such as bidders’ conference or site visits.

1.5 Submission of Bids

Insert any special instructions as applicable.

1.5.1 Bids to be Submitted at Prescribed Location

Indicate what method(s) are acceptable for the submission of Bids. This could include hardcopy, email, fax or if available electronic submission.

1.5.3 Bids to be Submitted in Prescribed Format

Indicate the number of copies of Bids required. You should indicate the type of copies, how many hard copies and how many electronic copies. Some competitions may require the submission of samples; you can provide details on the requirements for samples in this section.

Part 2 – Evaluation of Bids

This section details the steps that you will take in the evaluation of submitted Bids. This template has suggested steps to be taken. You may modify this section to match your competition.

2.2 Stage I – Mandatory Requirements

This section indicates that the first step in the evaluation process is to determine if bids are compliant. Bids that do not meet all mandatory criteria will not be further evaluated.

2.2.4 Bid Security

Provide details of any bonding requirements if applicable.

2.4 Stage II – Evaluation

This section indicates that price evaluation will only be undertaken with compliant bids.

2.5 Select the Compliant Bidder

This section indicates the process that will be used for picking the top evaluated bidder.

Part 3 – Terms and Conditions of the ITT Process

It is important that you read and understand all of the clauses within this section of the ITT. Most of the clauses do not require modifying or customizing. Those clauses that may include an instruction for further information or some form of customization are clearly marked.

Appendix A – ITT Particulars

This appendix will be used to detail the required deliverables or the scope of work for the competition. There should be a direct relationship to what is required as deliverables or the scope of work and what is being requested as part of the Appendix B – Pricing Form.

A. Deliverables

Where ever possible the deliverables or the scope of work should be described in terms of outcomes, results or performance specifications. The use of brand names should be avoided, including when we state the requirement as “brand x or equivalent”. Rather, we should state that we are aware of brands x

and y and that we are also open to consider other brands that can meet the intent of the specifications or requirements (See the Scope of Work Writing Guide). It is understood that at times a product or a component of a product may be required as mandatory but if at all possible the intent is to describe the good or service in a way that will allow for more competition rather than less.

B. Material Disclosure

We are obligated to fully disclose any information that might affect the proponent's ability to fulfill the requirements of the resulting contract. This could include disclosing items such as "in completing the renovations the proponent is advised that the walls contain asbestos". This is just an example but the idea is that we have a duty to disclose all know information to proponents.

C. Mandatory Requirements

Provide a complete list of all mandatory requirements that have to be met to be considered compliant. CAUTION: It is advised to consider very carefully what is considered mandatory. Mandatory items are show stoppers so don't inadvertently eliminate viable proponents or viable solutions with the prolific use of mandatory criteria.

The next area provides some options for Crown Corporations on the application of the trade agreements

Appendix B – Pricing Form

Provide instructions on how to complete the pricing form. The pricing requested should match with the deliverables being requested. You may request individual item pricing or a lot price. You should also decide if you require separate pricing for options or additional warranty or freight. You should be familiar with the unit of measure that may be standard in the industry for the deliverables you require. You may indicate if you will accept alternative units of measure.

Appendix C – Form of Agreement

You should attach a copy of the resulting agreement that the proponent will be agreeing to.

Appendix D – Submission Form

This appendix will be attached to the ITT and is to be completed by the proponent and included in its submission.