

DTP Practice Note 6 - Electronic Issue of Tender Documents

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1. INTRODUCTION

1.1 Application

- (a) This procedure applies to all Capital Works projects funded in part or in total by the Department of Education & Skills.

1.2 Design Team Procedures

- (a) For major capital projects this document should be read in conjunction with the Design Team Procedures 2007 including any subsequent amendments or DTP Practice notes.
- (b) For Summer Works, Emergency Works and devolved projects less than €500,000 this document should be read in conjunction with TGD007 3rd Edition March 2011
- (c) (In all cases the onus and responsibility rests with the Design Team to ensure that the project is fully designed and detailed before going to tender, that all the information necessary to complete the construction is included in the Tender Documents and that all documentation and information received from the Contractor that should be included in the Contract Documents is referred to in the Tender Report and made available to the Contracting Authority for inclusion in the Contract Documents.

2. ELECTRONIC TENDERING

2.1 Electronic Issue of Tender Documents

- (a) The electronic issue of Tender Documents is permitted subject to the following restrictions.
- (b) The Contract Notice/eTenders advertisement must state clearly (under additional information) that:
 - (i) One hard copy of the complete tender package will be available for inspection during office hours at a designated address (Usually the QS or Architect's office). This hard copy will be deemed to be the official set of tender documents. Viewing of the documents will be by prior appointment only (to retain confidentiality of tendering).
 - (ii) A4 and A3 Tender Documents will be issued electronically only (in Microsoft 'Word' {or Word compatible} or PDF format). Any larger CAD documents (A2 or greater) will be issued in DWF format. These larger documents will also be available on request in hard copy.
 - (iii) The onus rests with the Tenderer to check the completeness of the documents downloaded, emailed or issued in hard format such as CD, DVD, USB memory stick, SD card or the like. Where such downloads or hard format documents are incomplete or illegible, the Tenderer must notify the party issuing the documentation immediately.
 - (iv) Tender Returns must be in printed format, as described in the Instructions to Tenderers.
- (c) The format of distribution (e.g. CD, email, etc) must also be stated in the Contract Notice/eTenders advertisement. If distribution is by email or web link, the Contract Notice/eTenders advertisement (or Tender Documents) must also make it clear that a hard format copy of all the documents is available on request.

2.2 Format of Tender Documents

- (a) Where possible, documents should be in A4 format. The use of A3 drawings, details, schedules and diagrams is also acceptable as long as both the graphics and text is clearly legible without magnification at that scale.
- (b) Large documents (e.g. A2 or A1) drawings prepared using CAD should, by preference, be issued in Drawing Web Format (DWF). This format is "equivalent" to PDF format for written documents in preserving the original document as "read only" in a similar manner to PDF documents, but it allows 3rd parties the opportunity to notate the drawings. The software required is freely available without licence. Where drawings are issued in DWF format, printed copies should also be made available to tenderers on request.
- (c) For smaller projects (with a limited number of general arrangement [GA] drawings), GA drawings may be subdivided into more than one A3 drawing (to ensure legibility) as long as a "key" plan is included that clearly shows the relationship of each section of the building to the next. Where GA drawings are subdivided as above, printed copies should also be made available to tenderers on request.
- (d) Pricing Documents (Bills of quantities), specifications, schedules, etc., should be in PDF, Word format or equivalent. Pricing documents may also be prepared using Microsoft Excel, Access, Lotus 123 or any other commonly available spreadsheet or database software that allows the publication of output in a format that allows access to the output from other commonly available software packages, particularly those designed for the estimation of costs and the pricing of work, but prevents the alteration of the published material. In the case of Bills of Quantities, it should be possible for the Tenderers to electronically transpose the information therein into another format (e.g. Buildsoft, Masterbill, RIPAC, etc).
- (e) It is recommended that the content of Word (or equivalent) format documents such as specifications should be protected to avoid alterations or changes and consequent errors in interpretation by tenderers. (Whether the circulated documents are protected or not, the hard copy in the QS or Architect's office is the official tender package, not the electronic version).
- (f) The file naming convention should reflect the document or drawing title. Refer also to DTP Practice Note 2 – Tender Documents.

2.3 Tender Records

- (a) In all cases, at least one copy of all drawings and documents issued electronically must be printed off either before or (immediately after the issue of the electronically circulated Tender Documents). Each document in the package should be marked "Tender Document issued on XX/XX/XXX date" and should be signed and dated by the Design Team Leader. This record copy should be retained on file (usually in the QS or Architect's office) and should be made available for inspection by tenderers (as above).). The printout of the documents issued electronically should be checked immediately for completeness. Where documents are incomplete or illegible, all Tenderers must be contacted immediately, made aware of the problems and issued with corrected replacements at the earliest

opportunity. The replacements shall be accompanied by a cover note and confirmation of receipt sought from the recipients.

- (b) In addition to the above, a two PDF copies of all the above documents (marked Tender Document issued on XX/XX/XXX should be made and stored in separate locations (e.g. the QS's and the Architect's offices)
- (c) Likewise, all supplementary documents issued during the tender period should also be printed off as soon as issued, and marked in the same manner as above. PDF versions of those documents (as above) must also be made as soon as possible and placed in storage with the original documents in their two separate locations.
- (d) Lastly a further 2 copies of the Tender Documents (including any supplementary information issued during the tender period) marked "Tender Document issued on XX/XX/XXX date" must be printed off. These will form part the Contract Documents (one retained with the signed contract documents by the Contracting Authority and the other issued to the Contractor as part of the copy of the contract documents)

2.4 Tender Returns

- (a) Tender returns must be in Hard Copy.
 - (i) The correct form of Tender must be completed, and signed in ink.
 - (ii) The completed Pricing Document (Bill of Quantities or Schedule of Rates) returned with the Tender submission may be in another format (e.g. Buildsoft, Masterbill, RIPAC, etc.) as long as the pricing information therein is the same and in the same order as the original Pricing Document (Bill of Quantities, Schedule of Rates) issued with the Tender Documents. It is not critical that each word of each description is the same as long as the identification of each bill/rate item is clear.

2.5 Validation

- (a) After the Design Team has checked and confirmed that the apparently successful tenderer [Preferred bidder]'s submission does not contain anything detrimental to the interests of the Contracting Authority, threatening to the formation of a valid contract or is not an "abnormally low tender", and prior to the issue of the Tender Report to the Sanctioning Authority, the Preferred bidder should be required to attend the office where the official copy of the tender documents is stored (within a period of 7 calendar days) and to:
 - (b) Cross-check the official copy of the tender documents and either confirm in writing that his/her tender is based on that set of tender documents or withdraw his/her tender.
 - (c) Check the list of additional and amended documents issued during the tender process and either confirm in writing that his/her tender takes into account and includes for the contents of all such documents or withdraw his/her tender
 - (d) Complete (in the presence of the Quantity Surveyor) a copy of the official Pricing Document (Bill of Quantities, Schedule of Rates) in ink using the rates returned with the Tender submission. This Pricing Document (Bill of Quantities, Schedule of Rates) must be signed by both the preferred bidder and the Quantity Surveyor and shall be deemed to be the tender Pricing Document and shall also be the document identified in the Contract as the Pricing Document. It shall be made available to the Contracting Authority for inclusion with the Contract Documents.
 - (e) The Tender Report shall be accompanied by the originals of the confirmations or withdrawal documents so that, if an award proceeds, the confirmation documents can be included as supplementary Contract documents.
 - (f) The Design Team must also confirm in writing in the Tender Report that the above validation process has taken place