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Invitation to Tender Template

Created by

Date

# Invitation to Tender Template

## Invitation to Tender for the Provision of

**[Insert Requirement Here]**

**To be supplied to [Insert Company Name]**

(Does a Confidentiality Agreement need to be signed before the ITT is issued?)

|  |  |
| --- | --- |
| Project | *[Insert Project or requirement being tendered]* |
| Revision | *[Insert which version this tender refers V]* |
| Release Date | *[Insert ITT release date]* |
| Issuer | *[Insert name of person issuing the ITT]* |
| Document File | *[Insert document file this ITT refers]* |
| Supplier Response Date | *[Insert Vendor's deadline for responses]* |

## Revision History

|  |  |  |  |
| --- | --- | --- | --- |
| Revision | Date | Author | Notes |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

## Approval

|  |  |  |
| --- | --- | --- |
| Name | Interest | Signatures |
|  |  |  |
|  |  |  |
|  |  |  |

## Distribution

|  |  |
| --- | --- |
| Name | Interest |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |

Date: [Insert date]

[Insert Company Contact Name]

[Insert Company Name]
[Insert Company Address]

[City]

[Postcode]

Dear ………….

## Invitation To Tender for an [Insert provision required]

You are invited to submit a tender to provide an *[Insert provision required]* to the *[Insert your company name]*.

By participating in this tender you are indicating your acceptance to be bound by the guidelines set out in this letter and attachments. We provide below the key details of *[Insert Company Name]* requirements, which you should take into account in your response. Please acknowledge via email safe receipt of this letter within two working days together with your confirmation of your intention to tender.

To simplify exchange of information regarding this Invitation to Tender (ITT) please nominate a Bid Manager (together with their deputy) and relevant contact telephone, facsimile numbers, and email addresses.

Please direct any questions regarding the ITT content or process to the *[Insert Company Name]* representatives named below. You should not contact other *[Insert Company Name]* personnel unless directed to do so by the *[Insert Company Name]* representative. *[Insert Company Name]* reserves the right to disqualify and reject proposals from suppliers who do not comply with these guidelines. All questions should be submitted in writing either by post or to the email address below.

Only communications made by your Bid Manager (or their deputy) to our named representatives, *[Insert Company Representative and Title]* will be taken into account during the pre-contract tender period.

As part of this tender process *[Insert Company Name]* makes no obligations in any way to:

(i) pay any vendor for any ITT response; or

(ii) award the contract with the lowest or any bidder; or

(iii) accept any ITT information received from vendors; or

(iv) include vendors responding to this ITT, in any future invitation; or

(v) any other commitment to vendors whatsoever.

I look forward to receiving your response.

Yours sincerely,

Name:

Title:

*[Insert Company Name]*

Email address

Tel:

This document is proprietary to *[Insert Company Name]* and the Information contained herein is confidential.

Without *[Insert Company Name]* prior written permission, this document, either in whole or part, must not be reproduced in any form or by any means or disclosed to others or used for the purposes other than its evaluation by *[Insert Vendors Name]*. It may not be disclosed to any third party outside of the agreed Confidentiality Agreement with regard to ‘Permitted Recipients’

Whilst care and attention has been exercised in the preparation of this document, it remains subject to contract and all warranties whether express or implied by statute, law or otherwise are hereby disclaimed and excluded.

These limitations are not intended to restrict continuing business discussions between *[Insert Company Name]* and *[Insert Vendors Name]*.

Any proposal received by *[Insert Company Name]* is subject to contract with *[Insert Company Name]*.

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1. **Introduction & Overview**
	1. **Company Background**

Insert no more than approximately two paragraphs of information about your organisation.

* 1. **Background to the Project**

[*Insert Company Name*] is currently reviewing the provision of *(subject)* services to [*Insert Company Name*] throughout the UK. To this end, there may be changes to the strategic *and/or* operational processes regarding how [*Insert Company Name*] meets *(subject)* requirements for the organisation. This has led to the release of the ITT. Following this process, [*Insert Company Name]* may award a new contract in *(due course or put in a date)* regarding *(subject)* services.

1. **Timetable**

|  |  |
| --- | --- |
| General  |  |
| Confirmation of receipt of this document  | Email confirmation:  |
| Deadline for submissions  |  *[Insert date]* |
| Selection of providers for interview  | Presentation to *[Insert Company Name]* evaluation team on the *[Insert date]* |
| Contract implementation date  | *[Insert date]* |
| Email copies of this document  | If you would like a Word copy of this document please email *[Insert contact name]* |
| Questions | Questions arising from this document should be given to *[Insert contact name]* or in his absence, *[Insert contact name]*  |
| Full contact details  | *[Insert contact name]**[Insert company position]**[Insert full address]* |

**3. Respondent Instructions**

This section provides detailed instructions to be followed in responding to this ITT. Included are Response Guidelines and *[Insert Company Name]* Contact Information.

a. Response Guidelines

You will be required to submit a written proposal as part of the response in the form set out. You should submit two hard copy sets of written responses, one of which should be unbound and also an electronic copy of the document, which should be labelled clearly. Responses should be on A4 paper, with sequential page numbering. Your Bid Manager should sign all responses. The sections should use the same paragraph numbering system as this ITT and should specifically address all sections onwards.

Please deliver the two written responses and electronic copy to:

*[Name and e-mail address of Procurement representative]*

*[Insert full address]*

*[Insert Company Name]* reserves the right to disregard any response submitted after the timetable deadline.

You are expected to supply all required information, or clearly state the reason for being unable to do so.

Any assumptions used in preparing responses should be clearly stated. Any appropriate supporting documents e.g.; maps, brochures, organisation charts, etc. should be included.

Questions relating to clarification of the ITT will only be accepted in writing to the *[Insert Company Name]* representative. Likewise, all responses from *[Insert Company Name]* will be written and may also be made available to other vendors (subject to confidentiality). In the event that any answer materially affects the ITT specifications, an amendment to the original requirement will be escalated to all vendors. *[Insert Company Name]* will attempt to answer any question within 3 working days of receipt of that request; otherwise it will respond within that timescale notifying you of the estimated time to obtain the information.

*[Insert Company Name]* reserves the right to modify the provisions of this ITT at any time prior to the scheduled date for written responses. Additional scope and requirements can be added. Notification of such changes will be provided to all vendors.

Should you wish to propose a deviation from the specification please ensure that you clearly identify and highlight where appropriate in your response.

By submitting a response, you are committing to an understanding that you understand the requirement and have sufficiently addressed all aspects of the tender and information contained within the data room and that you have checked all stated details, such as prices, to be correct and as intended.

All information supplied by *[Insert Company Name]* in this tender to date, and any further information supplied during the tender process is subject to the confidentiality agreement you have signed.

**4. Tender Assessments**

## a. Evaluation Criteria and Process (add/delete as appropriate to the requirement)

A set of detailed evaluation criteria has been prepared by *[Insert Company Name]* for the evaluation of every Submission. Within each stage an initial evaluation will consider whether or not every instruction and requirement contained within the ITT has been fulfilled.

The evaluation criteria will be based upon some or all of the following aspects of the Bidders’ proposals in (not in order of significance) :

**b. Commercial**

* + 1. Competitive price
		2. Price clarity
		3. Management information provisions
		4. Contractual compliance

**c. Service Capability**

1. Service delivery experience
2. Service delivery models (including business continuity)
3. Quality
4. Compliance with Service Levels
5. Culture and ability to work with *[Insert Company Name]*
6. Ability to adapt to changing business requirements
7. Continuous improvement plans

**d. Long term roadmap proposals**

1. Innovation and added value
2. Strategic fit

**e. Financial**

1. Financial strength demonstrated across the Bidder’s group structure. Please include your company’s revenue and net results for the last two years with your response.
2. An established financial track record demonstrated for the legal entity that TC would be contracting with (please include your company’s registration number and registered address in your response).

**f. Level of Compliance with ITT**

1. Understanding of all parts of the ITT
2. Proposals / bids provided are in accordance with the Instructions
3. Adherence to the timescales to send back responses

You are reminded that throughout the process *[Insert Company Name]* will continually assess all contact with the bidder’s organisations including compliance to the process, presentations and on-site representatives. *[Insert Company Name]* reserves the right at its sole discretion to disqualify without further consideration any submission that does not satisfy this basic requirement

**5. Briefings for Unsuccessful Participants**

*[Insert Company Name]* intends to offer a feedback session to every Bidder submitting an unsuccessful proposal *[Insert Company Name]* reserves the right to control the format and content of any such briefing, and to limit it in any way believed by *[Insert Company Name]* to be appropriate (which includes, in exceptional circumstances, the right to refuse a briefing without giving any reason for doing so).

# Service Level Agreement Metrics

**1. Introduction**

This appendix “Service Level Agreements” or SLA is intended to form the basis of the service level negotiations. This appendix defines the service levels that need to be agreed with the Bidder and will be the foundation of the core SLA’s during the term of agreement. This appendix also highlights some of the roles and responsibilities of the participant, *[Insert Company Name]* and other third parties contracted to [*Insert Company Name]*.

**2. Service Level Details**

Key components of the SLA will include **(add/delete as appropriate)** :

* A set of key requirements around timeliness and accuracy of the major service elements;
* A number and frequency of management reports;
* Key performance indicators (KPIs) which accurately measure adherence to the SLA;
* A service credit process which serves to encourage performance in line with the service standards
* The service level requirement should be specific i.e. 99% of orders to be delivered within 2 working days from order of receipt
* The service level requirements are not targets; they are minimum requirements that should always be achieved.
* You should state in the SLA that you have the right to audit the service level statistics at any time.
* The supplier should provide all SLA statistics
* Consider the consequences of non-performance to the SLA – are service credits appropriate?
* Consider how the SLA will be managed.

##



info@phase3.co.uk www.phase3.co.uk 0800 321 3032

Swan Square, 56 Oak Street, Manchester, M4 5JA Company number: 05034692

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