# Lecture 24

Planning your Response

****

# Planning Phase

The key to successful tendering is careful planning and time allocation.

# Generally you should:

* Read the request for tender document thoroughly.
* Ensure that you understand what is being asked for.
* Know the closing date and address for submission of tenders.
* Follow the instructions in the conditions of tendering. Non- compliment responses are likely to be treated as invalid and therefore not considered.
* Carefully evaluate the scope of work being asked for and whether all
* The work can be done in-house or whether others will be involved.
* Where others (e.g. Subcontractors) are to be involved, allow time to prepare a tender which includes input from all the other parties, particularly in relation to price.
* Not leave everything until the last minute. Obtain a copy of the document as soon as it becomes available. Seek information in plenty of time and plan to submit the day before the closing time.
* It is best to work to a checklist when tendering, to ensure you cover all aspects required.

# Check list for Planning

* Points to keep in mind with your checklist and during planning your
* response should include:
* Regularly review/update your checklist throughout the tender period.
* Use the checklist against your final draft response (to ensure it is complete and fully compliment with everything that was asked for).
* Keep track of any tender amendments issued and ensure these are included. If there are many amendments, you can include a list of these amendments as an appendix to the tender response.
* Check the commercial and contractual aspects of the tender. Determine if there are any performance guarantees, warranties, special insurance requirements or other commercial provisions that will require careful consideration.
* Check if there is a recommended payment schedule in the tender.
* Prepare to suggest alternative payment schedules, if necessary.
* Think about the schedules for costing and how these are to be presented. It is a good idea to establish a tender costing model.
* Ensure someone with the authority and make him tender manager for the specific project. If you need your senior management or board to approve the budgeted price and tender documents prior to submitting, allow appropriate time for this to happen, and for any subsequent amendments to be made to the submission.

# Organizing your research

* Research is an essential requirement for successful tendering. It is
* suggested that you should:
* Acquire a working knowledge of the government purchasing policies and procedures. Learn how the system works and use the knowledge to your advantage.
* Learn to use the internet effectively. Increasingly this will be where market information and future opportunities will be found.
* Find out the evaluation criteria. This information should be detailed in the tender document Where it is not provided, contact the concerned purchase officer.
* Attend any tender briefing sessions arranged for the tender, and forward any questions you have to the tender contract, in writing, before the session. This is usually the best opportunity to ask questions and receive the information.
* For larger tenders it may help to prepare a tender bid strategy with an analysis of the prospects of winning the bid, your competition and the resources required to implement the project.
* Determine at an early stage if you can provide a competitive solution.

# Reading the Project Brief/Specification

When you receive the project briefs/specifications, highlight the important information, and plan your response keeping in view the following important points.

# Important Considerations during Planning

* Closing date and time
* Submission details
* Contact for enquiry
* Number of copies required
* Declarations/Attachments, etc.
* Samples required
* Specific information to be provided
* Pricing basis
* Proposed budget
* Statement of Compliance

# Contract period

* Evaluation criteria
* Project outcomes
* Copyright requirements (if applicable)
* Quality assurance requirements
* Progress reports required
* Additional responsibilities.

Always read the specification/documentation thoroughly and completely. Important information sometimes appears towards the end of the documentation. If you are not sure of any points, seek clarification by contacting the Purchase Officer