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Requisitions for Tendering Procedure



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Requisitions for Tendering Procedure

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Requisitions for Tendering Procedure

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Requisitions for Tendering Procedure

1.0 PURPOSE

This procedure covers the development by Engineering or Originating Department of the technical requirements relative to a package of Works or Services to be tendered for a Project as identified in the Project Contracting Strategy (PCS) to provide a consistent structure and review cycle from draft Requisition through to the Requisition for Tendering (100% Requisition) as identified in the PCS.

This Requisition, when approved by the Entity Authorized Signatory at Final Issue stage, will form the basis of the Invitation to Tender for the Works or Services.

2.0 SCOPE

This procedure applies to Contract activities conducted under the administration and management of the Contracts Management Department.

3.0 DEFINITIONS

Term	Definition
2nd Party	Contractor, Consultant, Engineer or Supplier who expresses interest in prequalifying for a specific package of Works or Services and upon Award becomes the entity contracted to perform such Works or Services.
Agreement	Contract or Purchase Order (collectively "Agreement") between the Entity and a 2nd Party.
Construction Contractor	The Main or Principal Contractor responsible for undertaking the Construction Works on the Project.
Entity	Government Entity, Authority or Ministry responsible for the Project(s).
Enterprise Content Management System (ECMS)	An information management and collaboration platform for managing and controlling program documents and records.
Law	Government Tenders and Procurement Law issued pursuant to Royal Decree No. (M/128) dated 13/11/1440 AH and the Implementing Regulations thereof issued pursuant to the Minister of Finance's Resolution No. (1242) dated 21/3/1441 AH and as amended thereafter.
ITT	Invitation to Tender documents, also known as Request for Requisition (RFP).
PCS	Project Contracting Strategy.
Project	Project to be undertaken by an Entity that consists of single or multiple Agreements with 2nd Parties to perform Works or Services as part of the execution plan to deliver such a Project.
Requisition	Requisition for Tendering.
Services	Provision of technical or consulting services for design, studies, investigations (geotechnical, surveying testing), specialist advice or the like that are not the Works but necessary to support them.
Site Construction Department	Department within the Project Management Company that is responsible for Construction activities/operations.
Contracts Management Department	Department within the Entity Project Management Organization (EPMO) or at corporate level authorized to conduct contracts formation and administration activities.
Site Document Control	Department within the Project Management Company that is responsible for the control of all project Documents using ECMS.



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Site Engineering Department	Department within the Project Management Company that is responsible for Engineering or design activities/operations.
Works	Construction or supply of goods, facilities or the like of permanent and temporary nature as contracted by the Entity.
Entity Authorized signatory	The authorized individual at the entity to approve all requisitions within his threshold according to the internal governance.

4.0 REFERENCES

1. EPM-KE0-PR-000006 Development of Service Requisition
2. EPM-KD0-PR-000001 Contracting Strategy and Reporting Procedure

5.0 ROLES & RESPONSIBILITIES

The originator department and requestor of service remains overall accountable for the development and issuance of the Requisition in accordance with their relevant Procedures as outlined in the Whit Book and this Procedure.

The following defines the individual roles and responsibilities associated with the development of Requisitions for Tendering:

Individual	Role
Entity Authorized Signatory	Responsible for final approval to accept the 100% Final Issue Requisition for Tendering in accordance with this process
Contracts Specialist	Responsible for the review of the Requisition in accordance with these guidelines from a contractual and commercial basis.
Engineering Management Department Manager	Provide final review and approval for Engineering Department that the Requisition meet the requirements of Engineering Procedure EPM-KE0-PR-000006 (Development of Service Requisition Procedure) and this process for a Requisition for Tendering.
Originating/Originator Department	Includes the Engineering, Construction or any other department requesting the services relevant to their scope. Responsible for the preparation of the Requisition and required technical information necessary to provide the complete Requisition to the Contracts Management Department and approval of the Entity Authorized Signatory.

6.0 PROCEDURE

6.1 General Preparation

Any Project Department may prepare a requisition covering Services or Works and obtain the approval of the respective department manager. The Originator must:

- Prepare the Requisition for Works or Services based on the Scope of Works including drawings and specifications which need approval from the Engineering Management Department.
- Requisition shall clearly identify the revision being used for Scope of Works, Drawings and Specifications.



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- The Originator must obtain all necessary approvals, requisition number and cost coding before the Requisition is submitted to Contracts Management Department.
- For complex services and drawing packages by Engineering, it's recommended to conduct Requisition review at a minimum of 60% and 90% stage of completeness to ensure that any potential changes or corrections are captured prior to the 100% Final Issuance of the Requisition to the Contracts Management Department for preparation of the Invitation to Tender document.

6.2 60% Requisition Review

The Originator Department shall issue, as part of the document review at 60% stage, a Requisition for review by the Contracts Management Department.

The Requisition shall include the current version of the following Contract documents (if available for review):

1. Schedule of Prices (Bills of Quantities or Lump Sums)
2. Method of Measurement
3. Scope of Works and Specifications
 - a) Scope of Works
 - b) Table of Specifications
 - c) Indication of Facilities to be provided by Entity (if any)
 - d) Indication of Permits to be provided by the Entity (if any)
4. Drawings (table of drawings)

The Contracts Specialist will review the Requisition to ensure that:

1. No commercial terms or conditions are inadvertently included in the Scope of Work or Drawing that may conflict with the Contract Terms and Conditions.
2. Language and definitions included are in accordance with the definitions included in the Contract Terms.
3. Scope is not ambiguous and reflects intent of the parties.

The Contracts Specialist will mark up all comments/proposed changes to the Requisition and return to the Contracts Manager for approval. The Contracts Specialist may make comments as to the clarity of the technical Scope of Works; however, the final approval of all technical matters remains the jurisdiction of the Originating Department.

The Contracts Manager shall review the comments and if in agreement, return to the Originator to be included in the submission of the 90% Requisition (if required in the PCS) or proceed to 100% Requisition for low-value, low-complexity, scopes.

6.3 90% Requisition Review (Optional)

Where identified in the PCS (Procedure EPM-KD0-PR-000001), complex or high value packages shall be identified as requiring a 90% Requisition to be issued for review.

Whenever the 90% Requisition Review is requested in the PCS, the above process for 60% Review repeats, with the exception that the Contracts Specialist shall check to ensure that comments previously raised in the 60% Review have been incorporated, or where not, identifies such deficiencies to the Contracts Manager for discussion with the department manager or Originator if the comments are of significance that they may impact the award, or post award, administration of the Agreement.

6.4 100% Final Issue Requisition

The Originator shall forward to the Contracts Management Department, via the entity Document Control system or other approved mean at the Entity, the final and approved Requisition with all specification(s), drawings and other relevant data and request to tender the package.



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The Contracts Management Department will acknowledge receipt of the Requisition and review for completeness. A complete Service Requisition must include the following:

1. Requisition (EPM-KD0-TP-000003 - Requisition for Tendering Template).
2. Requisition Checklist (EPM-KD0-TP-000004 - Requisition Checklist Template).
3. Schedule of Prices (Bills of Quantities or Lump Sums).
4. Method of Measurement.
5. Scope of Works and Specifications.
6. Drawings.
7. Milestone Schedule - To Be Provided by Project Controls.
8. Budget (stating currency) - To Be Provided by Project Controls.
9. All agreed corrections that arose from the 60% and 90% reviews as applicable.

The Contracts Management Department will return to the Originator any Requisition that is incomplete and state what documents/corrections are required before the Contracts Management Department can commence work on finalization of the Invitation to Tender Documents.

The Originator shall resubmit to the Contracts Management Department as necessary the corrected Requisition of missing documents.

Upon acceptance of the Requisition by the Contracts Management Department Manager, the Contracts Specialist assigned to prepare the ITT Package will proceed with the preparation of the Final Invitation to Tender (ITT) Package to be ready for issuance to 2nd Parties as commencement of the formal Tender process.

7.0 ATTACHMENTS

1. EPM-KD0-TP-000003 - Requisition for Tendering Template
2. EPM-KD0-TP-000004 - Requisition Checklist



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Attachment 1 - EPM-KD0-TP-000003 - Requisition for Tendering Template

Requisition for Tendering

General Information			
Requisition No.:		Project No.	
Originating Dept:		Agreement No.:	
Originator:		Agreement Title:	
Scope Summary:			
Pre-Tender Milestones		Schedule Dates	
Prequalification Complete:		Issue for Tender:	
60% Requisition:		Tender Opening:	
90% Requisition:		Agreement Award:	
100% Requisition:		Agreement Completion:	
Commercial Information			
Agreement Category:	Design and Build (D&B), Consulting Contract (CC), Engineering (ENG), Construction (CON)	Budget Value:	
Agreement Type by Price:	LS = Lump Sum / UR = Unit Rate / CR = Cost Reimbursable / WUR = Work Unit Rate	Classification Class:	
Other			
Requisition Checklist Completed	<input type="checkbox"/> YES <input type="checkbox"/> NO	If Engineering Contract does the Scope include Construction Support Services	<input type="checkbox"/> YES <input type="checkbox"/> NO
Approvals			
Requestor:		Checker:	
Approver:		Project Engineer/Site Manager:	
Project Controls:		Contracts:	



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Attachment 2 - EPM-KD0-TP-000004 - Requisition Checklist

Requisition Checklist

The attachments identified in the following table are required to be submitted with the Requisition (hard- and soft-copy files in their native formats. Certain supporting documents are mandatory to enable an invitation to the Tender to be prepared for issue; others are optional, subject to the scope of the package. When submitting the Requisition, the Originator shall state “YES” or “NO” if the supporting document is applicable to the scope of work or services. Where “YES” is stated, the Originator shall provide the applicable information with the Service Requisition (SR) to allow the Request for Proposal to be compiled.

SUPPORTING ATTACHMENTS TO SERVICE REQUISITION			
Document Name	Applicable	Documents Attached	Explanation of Documents
Scope of Works / Services	Mandatory		
If the Scope includes design services or support has the Scope captured the Support during construction required	YES / NO		
Appendix - Drawing & Data Submittal Requirements	Mandatory		
Drawings & Specifications (Schedule Only)	Mandatory		
Schedule of Prices / Bill of Quantities	Mandatory		List of Pay Items and Quantities (Unit Rates, Lump Sum or Cost Reimbursable) for Scope of Work—to be prepared in conjunction with Project Controls and Construction.
Method of Measurement for Payment	Mandatory		Description of Payment Method for Each Pay Item or Groups of Pay Items.
Is there a sectional or phased handover of the Works or Services to the Entity	YES / NO		If yes, provide details of the handover dates, interim and final and scope for accepting and commissioning parts of the Works prior to completion
Milestone Dates for Contract Works	Mandatory		List of critical Milestones that Second Party is to achieve in performing the Work—to be provided by Project Controls.
Does this Contract rely on Entity or others providing Free Issue Materials or Equipment (including available dates)	YES / NO		Schedule of all materials and equipment being provided to Second Party by the OWNER including available dates the materials or equipment will be on Site.
Does this Contract rely on Entity or others providing or restricting Access Requirements / Limitations	YES / NO		List of any restrictions or limitations on Access. These can be noted in the Scope of Works or as a Separate Document.
Does this Contract rely on Entity or others providing or restricting Lay-Down Areas (size, location etc)	YES / NO		Specification on the size, type and location of laydown areas being provided by the OWNER – Only required when there are limitations.



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SUPPORTING ATTACHMENTS TO SERVICE REQUISITION			
Document Name	Applicable	Documents Attached	Explanation of Documents
Does this Contract rely on Interfaces with Other Contractors that needs to be captured in the scope or terms	YES / NO		Any other contractors that this Second Party will need to coordinate with in performing of the Work. This should be included in the Scope of Works or if complex as a separate document.
Will Permits and Consents provided by Owner / Entity	YES / NO		List of any Permits provided (i.e. Environmental Consents) that need to be identified to the Bidders.
Will Utilities and Facilities (fuel, water (potable) water (construction) offices, cabins, bussing etc be provided by Owner / Entity	YES / NO		List of the size, type and location of any offices, power, water, fuel etc being provided by the OWNER.
Are there any Special Licensing Agreements or Registration Requirements for Contractors to perform this work	YES / NO		Identification of any requirements for special licenses to be held by the Second Party (i.e. Main Roads License) needed to perform the Work.

Note: If this scope is specific to a sole-source provider, then the documentation supporting sole-source recommendation/approval must have been submitted prior to the issue of the SR (**refer to Procurement Law and Implementation for Sole Source if the entity under Government Regulations**).