

Zululand District Municipality

Tender Summary Report

SUMMARY

This document is aimed at guiding the adjudicator of tenders or quotations to present the information to the tender committee in such a way that a decision can be made on the contractor to be appointed. It is a requirement that all the required information must preferably be available on a single sheet in a table form, and allow the adjudicator to compare all relevant information regarding all tenders. The table must also present project specific data, such as description, location, budget, etc.

The standard form of presentation Annexure: Tender summary Template Version 1.0(or as amended) will reduce the time needed to recapture the data in a format that can be presented to EXCO. It will also ensure that the author includes all the required information, thus reducing additional time spent on acquiring needed information.

This document (Notes for Consultants) is aimed at assisting the consultants and ZDM staff in populating the spreadsheet.

1 Column numbers

The columns are labelled to assist the reader in identifying the relevant column under discussion.

2 Populating the table

Col a:

This column must contain the project number of the project, which is the KN number for DWAF, the 2002 number for CMIP, the KN19 number of the CBPWP, etc. This number will be provided by the ZDM and should not be the consultants' own project number.

Col b:

The local Municipality in which the project is located is indicated in this column. The following abbreviations must be used:

UI	Ulundi
No	Nongoma
Ab	Abaqulusi
UP	uPhongola
eD	eDumbe

Col c:

This column contains the type of project, e.g. school, water, road, crèche, etc.

Col d:

This column contains the project budget including vat. This amount will not include the fees and will always include vat, in fact, all figures quoted must always include vat.

Col e:

This column contains the name of the project and the consultant's estimate (incl. vat). It is important that the estimate should always be made before tender to ensure objectivity in presenting the figures.

Col f:

The contractors are listed here. All contractors who were requested to quote, and/or all contractors who attended the site meeting and/or requested tender documents must be listed. It is important that all contractors be listed, to inform EXCO about which contractors showed interest in the project. Councillors often need this information to respond to queries. The full name must be quoted, and not an abbreviation of the name. The following must be added behind the name as required:

(DQ) disqualified (note: the reason/s must be listed in the comments column (n))

(CR) consultant recommends this contractor

The following will be added after the official approval was made:

* Preferred contractor appointed

** Second choice contractor appointed (usually with conditions attached to the first choice, e.g. negotiated reduced price, etc.)

The order in which the contractors are listed, will be ascending, and according to the corrected tender price (in column j)

Col g:

The origin of each contractor must be listed here. Care must be taken to ensure that the actual base of operation is listed and not a front address. Refer to column b notes for the contents.

Col h:

If the contractor attended and signed the attendance letter (which must be attached to the tender report) a “y” is marked in this column. In many instances contractors submit tenders without attending the site meeting. In these cases an “n” is marked in the space provided.

Col i:

The total percentage achieved according to the preferential formula must be entered here (refer to the ZDM policy in this regard).

Col j:

The tender price (after corrections) must be listed in this column. Any omissions, adjustments or other changes to the tender price must be discussed with and approved by the Manager: Technical Services before it is applied. The tenders must be listed in ascending order. All prices quoted must include VAT.

Col k:

The corrected tender price as a percentage of the consultant’s estimate in column e must be listed here. The figure could thus be over 100% or below 100%. The council’s policy on rejection of tenders below 10% (and below 12% in certain cases) below the estimate must be taken into account when completing this column and when considering the tenders. The consultants must prepare an estimate for each tender.

Col l:

This column will be used by the ZDM when making final recommendations to the Tender Committee. A change in scope of work to reduce the price to within budget limits could be an example of the need for this column.

Col m:

The adjusted price in column l as a percentage of the estimate in column e will be reflected here. The principles in the note of column k will apply here.

Col n:

Any comments can be added here. Comments must include reasons for disqualification if any.

Col o:

If the tenderer is a registered levy payer, a "y" is noted, else an "n" must be noted.

Col p:

The bank financial rating must be listed in this column.

Col q:

The previous 4 projects of the tenderer must be listed, separated by commas. The consultant must include his/her opinion of the capabilities of the tenderer to successfully complete the project, whilst listing the current commitments of the contractor.

Col r:

The Technical Department's rating of the contractor will be included here.

GENERAL COMMENTS

The following general comments must be noted:

- 1 The consultant must include all other supporting documentation in the report. This will include financial information etc.
- 2 The tender report must include tender dates, statistics regarding the tenderers, etc.
- 3 The use of a “?” in the form is not allowed. All spaces must be filled in.
- 4 Information not supplied by the tenderer must be obtained and can only be omitted after at least 3 unsuccessful attempts over 3 days.
- 5 The rejection of a tender due to the lack of information will only be allowed if written proof is provided that the procedure in 4 above was followed.