Shinfield Parish Council

Procurement Checklist

THIS GUIDE PROVIDES A SUMMARY OF THE PROCESSES REQUIRED TO BUY GOODS AND SERVICES AND EMBARK ON CAPITAL CONTRACTS

IT MUST BE USED IN CONJUNCTION WITH STANDING ORDERS, FINANCIAL REGULATIONS, FINANCIAL PROCEDURES & BEST PRACTICE

Shinfield Parish Council

Procurement Checklist

Estimated contract value threshold and procedure to follow:

Contracts/Purchases Below £5,000

Even though there is no obligation to seek competitive tenders for works and purchases below £5,000, every opportunity will be sought to find the best price and quality including delivery costs. Best practice recommends 2 quotations/prices **- follow pre tender stage of this checklist**

Contracts between £5,000 and £25,000

Written quotations must be sought from at least 3 suitable individuals or organisations **– follow pre tender and tender stage of this checklist**

Contracts above £25,000 (Procedures led by Legislation) **- follow all points on this checklist**

PRE TENDER STAGE

This is our residents' money
What do we want to achieve?
What happens if we do nothing
Is it in SPC plans
Is it a priority
Identify and Consider alternatives
Does this need to go to Development Board
Agree a high level project plan – include in Council Forward Plan
Agree a timeline/target
Have we consulted interested parties/stakeholders – including staff
Consultation – engagement, feedback, who will benefit
Can this be a joint project with another organisation
Consider <u>all related costs</u> and resources required and WHOLE LIFE COSTS
Have we got the budget – one off and ongoing
What do standing orders and financial regulations say we have to do?
How do we encourage local businesses & voluntary organisations to bid for this work
Can we use an existing Framework Agreement;
e.g. Hampshire Supplies / ESPO

ACTION 5 POINTBUSINESS CASE FOR COUNCIL APPROVAL

TENDER STAGE Lawful, Fair, Open, No Discrimination

- AFTER APPROVAL IN PRINCIPLE
- Refer to and FOLLOW Council Standing Orders (Section 19 c,d,e,f,g)
- Financial Regulations (Sections 10,11 and 12)
- Establish a detailed Project Plan and allocate /appoint a responsible person for delivery
- Allow sufficient time
- Write the Specification & Evaluation Criteria – what is critical / important
    - How will we measure bids
    - No hidden criteria and no changes – it is not a personal choice
    - Price, Quality, Essential, KPI's, Measuring Performance and Weighting of Results
    - Ask for References/Investigate other projects
- Estimated Value of Contract – What is legally required for this value
- Advertise widely
- Consult other Parishes and Councils
- How will the contract be managed – involve operations staff
- Contracts Finder Portal – see www.gov.uk/contracts-finder.

ACTION – INVITATION TO TENDER

EVALUATING TENDERS – Commercially Sensitive, Fair, Consider Professional Advice

- Receiving Tenders – STANDING ORDERS
- Decide who can evaluate tenders – panel, qualified, suitable, independent
- Set out the Scoring Methodology and a scoring sheet with space for notes
- Set out what to be considered for PQQ
- Be prepared to answer questions from suppliers/contractors
- Ensure all contractors / suppliers are sent the same information
- Do not share any added value options provided by a supplier/contractor
- DO NOT introduce any additional criteria – illegal
- DO NOT accept any late tenders
- Always give feedback on unsuccessful tenders – not actual price but ranking

AWARD CONTRACT

IT DOESN’T FINISH THERE – CONTRACT MANAGEMENT

- Contract Manager must be involved in the procurement process
- Make sure you get what you asked for
- Make sure the Council and the Contractor understand who is responsible for what – no late surprises;
  - Agree a delivery plan with all stakeholders– dates , outcomes and owners of activities
  - Agree a review and end date
  - Set a timetable for regular meetings
  - Agree the criteria for monitoring contract – clear standards of performance (KPI’s)
  - Agree a process for resolving disputes - penalties
  - Understand what triggers payment
  - Sign the Contract
  - Make payment – Financial Regulations and Procedures

REVIEW AND EVALUATE CONTRACT AND START AGAIN

Essential Reference

- Council Policy - Investing Shinfield Parish Council Funds 10 December 2020
- Standing Orders (18th January 2021) Pages 34-35
- Financial Regulations – Sections 10 and 11
- Shinfield Parish Council Procedures
  - Preferred Suppliers
  - Purchase Order System
  - Payments System