

# Procurement Procedure Rules and docs 2015



A quick guide to help you understand the rules and which documents to use.

Follow Step 1, then Step 2 route depends on the value. You must have expenditure approval, see overleaf.

Version 1

## Step 1

### FOR ALL PROCUREMENT

You must use existing Corporate Contracts set up by the Council and available on the intranet under Procurement and in-house services (Print, Archaeology and ICT). If there is no existing contract you should check if a “framework” contract exists for that service via the “Procurement Hub” <http://contracts.eelga.gov.uk/>. Only after those two routes have been explored should you follow the rules and methods detailed in Step 2 below. Contact the Procurement Team if you need help.

## Step 2

Up to £2,000

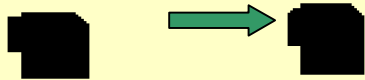
For contracts valued up to £2,000 the principles of best value apply and should be documented. Wherever possible obtain at least 2 competitive quotations.



£2001 - £20,000

### SUPERLITE QUOTATION

A minimum of three written quotations using the simplest of quotation documents and evaluation forms below. If the spec is more complicated/critical, you should use a higher value form.



PT54 Quotation Superlite

PT54e Evaluation Superlite

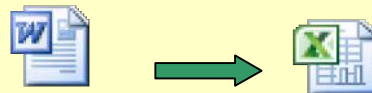
3 Quotes



£20,001 - £59,999

### QUOTATION

At least three suppliers should be invited; five or more is best practice. It should be a “sealed bid” using the standard quotation documents and evaluation forms below. If the spec is simple use a lower value form.



PT38 Quotation Lite

PT38p Evaluation

3 – 5 Quotes



£60,000 + EU threshold

Works £4,322,012 - Supplies & Services £172,514

### TENDER

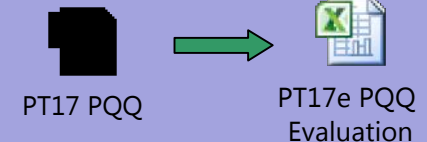
A formal tender with advertisement. N.B if above EU threshold, you must advertise in OJEU. At least five suppliers should be invited.



All Quotations & Tenders above £20,000 must use the Council's electronic tendering process (In-tend). The Procurement Team will assist you



PT39p Tender Open Evaluation



### Restricted EU only

PT46p Tender Evaluation Restricted

PT46 Tender Lite Restricted

For Detailed Instructions see The Interactive Procurement Toolkit

# Procurement Considerations & Contract Management 2015

**Consider: Producing a Business Case For Requirement: The Total Value Of The Procurement: If TUPE applies**  
See interactive toolkit for guidance see link below

## Approval to Incur Expenditure

Managers must not commit expenditure until they are certain that sufficient budgets have been approved in compliance with the Council's Constitution (see below for link to Constitution). It is important to engage with your finance support at the earliest opportunity to identify the costs and benefits of the procurement and to confirm the relevant route for approval of any subsequent expenditure.

<http://www.centralbedfordshire.gov.uk/modgov/ecSDDisplay.aspx?name=Constitution&clean=1>

Project Start up Docs	Terms and Conditions	Awarding The Contract
<ul style="list-style-type: none"> <li>• Quotation &amp; Tender Date Calculator</li> <li>• PT57 Project Start doc</li> <li>• PT22 Advert for Tender</li> </ul>	<ul style="list-style-type: none"> <li>• PT18 Minor T&amp;C's</li> <li>• PT19 Major T&amp;C's</li> <li>• PT20 Consultancy T&amp;C's</li> </ul>	<ul style="list-style-type: none"> <li>• PT41 Contract Approval    PT47 Contract Signing</li> <li>• PT56 Savings Form        PT31 Unsuccessful Letter</li> <li>• PT32 Successful Letter</li> </ul>

## Contracts Over £20,000 must be placed on the Councils Contracts register

### Contract Administration

The procurement/commissioning cycle does not end at order placement, contract management is a key element. You should have a copy of the contract and regularly monitor :

- |                         |                                |
|-------------------------|--------------------------------|
| •KPI's                  | Contract Performance           |
| •Costs                  | Outcomes & Benefits            |
| •Systems for monitoring | Recording Issues & Resolutions |
| •Managing payments      | Tracking Benefits              |

### Supplier Relationship Management

Annual efficiency and improvement reviews must be undertaken which monitor and report on progress against the contract. Reviews should look at performance, price, quality, delivery and any possible efficiency savings by using these documents. You should also record the final outcome/performance using PT62 Contract Completion form.



PT55 Letter



PT55 Monitoring



PT62 Contract Completion

**NEED HELP?** For further guidance see interactive procurement toolkit

<http://intranet.centralbedfordshire.gov.uk/directorates-service-areas/improvement-corporate-services/procurement/toolkit.aspx> or contact the Procurement Team on: [procurement@centralbedfordshire.gov.uk](mailto:procurement@centralbedfordshire.gov.uk)