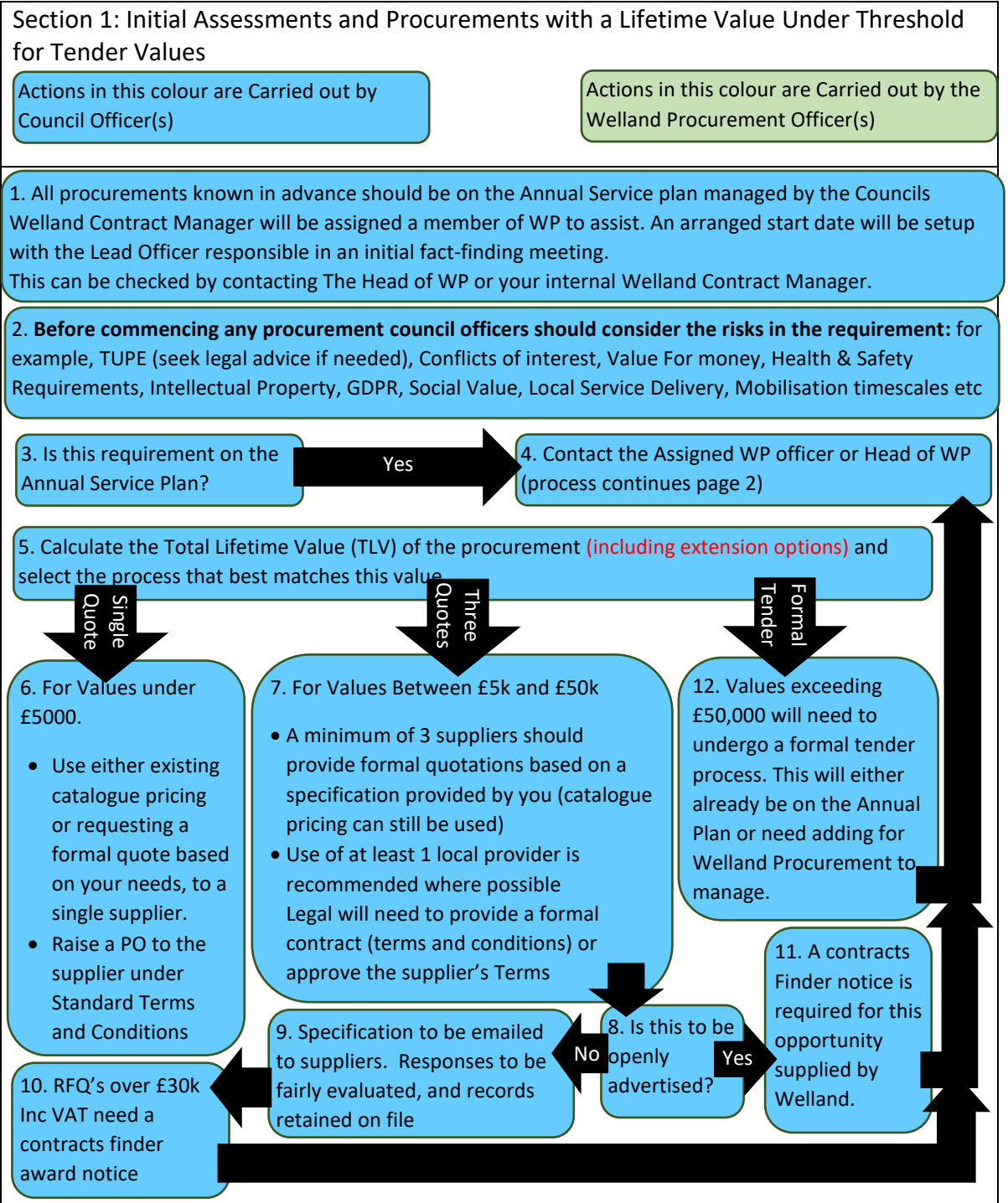


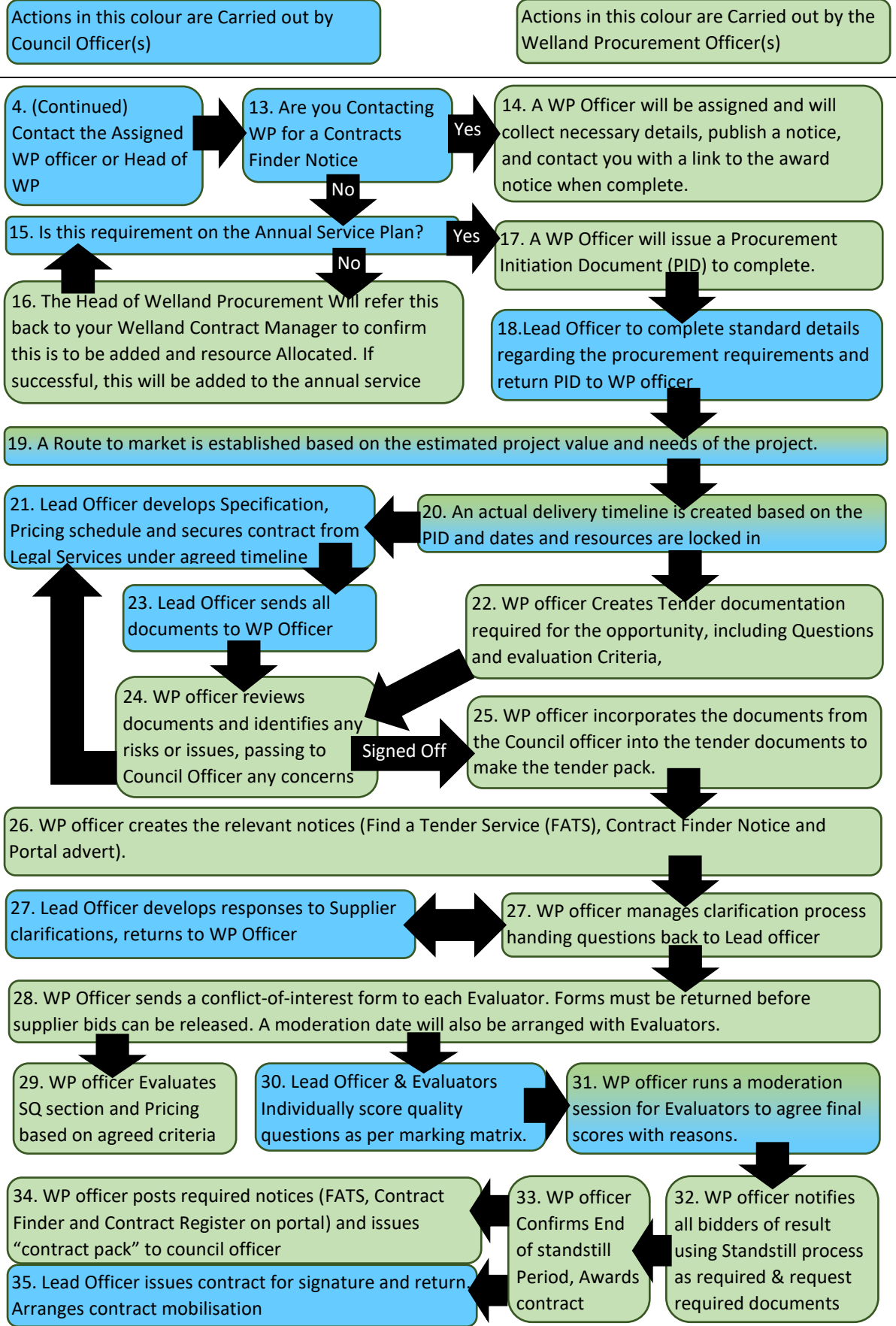
Welland Procurement:

Procurement Process Flowchart for Harborough District Council Staff

- This guidance is supplied by Welland Procurement as a quick access tool and should be used with the Councils Contract Procedure Rules (CPR's) and any Procurement Guidance not instead of it.
- Welland Procurement provide advice on procurements of all values however only actively manage those of a value requiring a formal tender process
- Each step is numbered in the workflow, and further details can be found on each step in the table at the end of this document



Section 2: Procurements with a Lifetime Value Over the Tender Threshold or Requiring Publishing on Contracts Finder



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Glossary

Term	Meaning	Term	Meaning
Welland Procurement (WP)	Part of Melton Borough Council carrying out procurement on behalf of other public bodies	Welland Contract Manager	The person responsible for working with WP regarding the service and workload. Click [here] for a list for each authority.
Annual Service Plan	The list of procurement to be resourced by WP agreed annually with each Authority	Lead Officer	The officer responsible for the procurement in the authority, usually a manager who requires the goods work or services being procured

Thresholds	<p>Currently the procurement thresholds within Harborough District Council are:</p> <ul style="list-style-type: none"> • Up to £5000 – Single Quote. • Over £5000 up to £50,00 – Minimum of 3 Quotes • Over £50,000 formal tender <p>For more details on this please see</p>
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Additional Support on each stage

Step	Additional information
1	<p>Welland creates an annual plan to manage their resources based on the demands of all members. A submission will be made annually by the Welland Contract Manager with all the known procurements required by the authority for the coming year. Any items arising outside of this process will be treated ad hoc.</p> <p>The annual service plan will be coordinated by the authority's Manager for the Welland Contract and all procurement work should come to Welland via them. [Insert Hyperlink to Contacts page]</p> <p>The Lead officer details will be passed to Welland Procurement (WP) and an officer from WP will get in contact regarding additional details to properly plan the work into the programme. To check if the project is already on the annual service plan or add a new project to the plan contact your Welland Contract Manager.</p>
2	<p>As part of the initial conversation with Welland officers we will be establishing key factors for the procurement and any risks that might be entailed which will require dealing with either in the documentation or procurement processes.</p> <p>This will include checking the need for any sign off by members or officers.</p> <p>As the subject experts Lead officers for the Procurement will have input into this</p>
3	To check if the project is already on the annual service plan or add a new project to the plan contact your Welland Contract Manager.
4	A WP officer should be in touch with you in advance of the procurement start date of any work on the Annual service Plan.
5	<p>To calculate the Total Lifetime Value (TLV) either use the project cost, or for ongoing requirements, the annual cost multiplied by the number of years needed.</p> <p>Where a service is new, use the annual budget instead of the annual cost, or any information you might have from the market as indicative costs.</p> <p>Length of contract must include any desired extension options as this will be part of the advertised value</p>
6	For requirements with a TLV under [£5000] officers may source directly from a supplier. This could be an online catalogue item or a formal quote (official email or Headed paper required) responding to your specified requirements.
7	For requirements with a TLV between [£5000 and £50,000] officers may either request quotes from 3 known suppliers or where suppliers are not known this can be escalated to WP to openly advertise nationally with Contracts Finder.

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8	When you don't know the market, or maybe want to widen the supplier pool from the names you know you will need to openly advertise an opportunity it will need to be formally placed on the UK governments Contracts Finder site (as well as any social media you might wish to use).
9	Where a Request for Quotation (RFQ) is not advertised the Officer emails the specification and terms to the suppliers directly. Responses must be evaluated fairly (in line with your CPR's) and records retained on file to support the decision.
10	Even if the RFQ is run by the department, when a contract is awarded for more than £30k inc VAT the details of the contract and winning bidder must be advertised on the UK Contracts Finder website. WP will support this.
11	Welland advertise opportunities as Contracts Finder notifications as part of the service and even can run the competition through the procurement system for you (resource allowing). Contact your Welland Contract Manager to request the resource.
12	Any Procurement over the tender threshold needs adding to the authority's Annual Service Plan. This is achieved either by the approval from the Welland Contract Manager in the Authority and Head of Welland Procurement, or by being included in the annually produced Service Plan. For ad hoc work this resource cannot be guaranteed but WP will endeavour to include as much as possible.
13	Notices are required to advertise all openly available procurements, as well as to advertise the award of any contract of £30k inc VAT.
14	Ensure to retain any links or copies of notices to place in your records.
15	Service plans are set annually and will be coordinated internally by the Welland Contract Manager for your Authority. Items arising through the year (changes in circumstances, grant funding, emergency work) will be reviewed by the head of WP and The Contract Manager to ensure it is properly resourced. This may mean compromises in timelines to accommodate the existing workload.
16	The Head of WP will refer any work coming directly to the team back to the Contract Manager for their comment before it is deemed as a formal request for resource.
17	The Procurement Initiation Document is a required stage and the completion of this sets the route to market, tasks required and formalises WP's resources in delivery.
18	It also commits both the Lead Officer and WP Officer to the timeline set by the information collected and the procurement route agreed. It is imperative that Lead Officers do not sign up to timelines they cannot deliver nor try and set timelines that cannot be delivered by WP, for resourcing or legal reasons.
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21	Once the PID is signed off the council officer will develop the documents that are their remit to the timeline agreed. Support can and should be sought from WP where required. Officers are usually responsible for delivering: The specification, the pricing documents, the contractual terms, any appendices such as drawings, KPI's, policies, blank method statements etc
22	Simultaneously the WP officer creates the tender documentation required under their remit – The instructions to bidders relevant to the procurement type, quality questions, formal notices, any set up on the tendering system required etc.
23	When the Lead Officer submits their documents for inclusion in the tender pack, the WP officer will check them for completeness and identify and risks stemming from them they find. Lead officers must then make decisions based on these as to whether to amend the documents or not. The final version of these will form the tender pack.
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26	The WP officer then creates any notices as required in the publishing of the opportunity
27	The WP officer picks up and clarifications from suppliers and will either manage these if they are within their remit or else pass these to the Lead officer for a response. The WP officer will then ensure clarifications are issued to all potential bidders to update the specification position.
28	The Evaluators identified in the PID will then be required to complete a conflict-of-interest form identifying that they are able to evaluate without prejudice. A moderation date will also be set at this time.

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29	A WP officer will evaluate the conformance aspects of the bid as set in the electronic questionnaire, as well as the pricing
30	Council Officers will evaluate the quality aspect of the bid, in isolation from each other, using the marking matrix provided by WP
31	The WP officer holds a moderation meeting in which evaluators share their scores and agree a final score with supporting reasons.
32	The WP officer notifies the bidders of the result at the same time, using the standstill process as required. They will also request any documents required from the winning bidder to substantiate their bid prior to contract signing.
33	If using a formal standstill process the WP officer will confirm it starting and ending and issue any further award information
34	WP officer publishes any award notices required, assimilates the tender docs into a contract pack and passes these to the lead officer to create the contract.
35	The Lead Officer, possibly with legal support will take the Contract pack and the template of terms and conditions and combine it then issue this for signature by the Supplier. Contract mobilisation periods can then be agreed if not set out in the tender.