

PLACE THE APPROPRIATE WORKSHEET(S) ON THE PROJECT FILE

nb this toolkit should be read in conjunction with the suite of Standard Documents

| | | Notes |
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| Receive Instructions from Stakeholders via Intranet Q.has authority been given to procure? Q. has funding been approved? | Y / N Y / N | |
| Set up kick off meeting with Stakeholder Agree project title Agree project reference One off purchase or ongoing? | Date: Title: Reference: One off? Ongoing? | |
| If ongoing, agree contract length Agree appropriate Procurement Route, based on the market: | Contract Length Open? Restricted? Framework? | |
| What is the value of the whole contract? | £5K - £50K £50K - £156K Over £156K | |
| Follow the appropriate worksheet for the procurement <i>nb per Standing Orders, SPU should be informed of all procurements over £5000</i> <i>Please use the Request for Service form on the Intranet to advise SPU.</i> | | |

| REQUEST FOR QUOTATION WORKSHEET | | Notes |
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| <p>Only use the yellow PQQ section if following the Restricted Procedure Use PQQ Template and Evaluation Sheet Agree Section 10 "Requirement Specific" Questions with Stakeholder Produce final PQQ Evaluation Sheet in conjunction with Stakeholder Agree timescale for PQQ period with Stakeholder Agree PQQ Evaluation Meeting</p> <p>Send agreed PQQ and Evaluation sheet to Procurement Assistant for issue Agree Advert Wording Place Advert on Source Derbyshire</p> | <p>Agreed Date: Agreed Date: PQQ Return Date: Meeting Date: Venue:</p> <p>Agreed Date: User Name: Password:</p> | <p>bob.truswell@bolsover.gov.uk xxxxxxx</p> |
| <p>Only use the yellow PQQ section if following the Restricted Procedure PQQs issued by Procurement Assistant responding to Expressions of Interest PQQs returned to Procurement Assistant either electronically or hard copy Chair PQQ Evaluation Meeting Produce Evaluation Scoresheet Rank Bidders in order and agree those going through to tender Produce PQQ Unsuccessful Letters- pass to Procurement Assistant for issue Requests for debrief to come via email to Procurement Assistant Produce PQQ Debrief Letters- pass to Procurement Assistant for issue If a contract is required, send Heads Up template to Legal Department Use RFQ Template and appropriate Goods/Service/Works Terms & Conditions Ask Stakeholder to prepare appropriate Specification Agree appropriate Pricing Mechanism</p> | <p>Date issued: Date issued: Date sent: Received Date: Agreed Date:</p> | |

Request for Quotation Worksheet Continued

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| <p>Agree Requirement Specific questions Produce final RFQ Cost/Quality Evaluation Sheet in conjunction with Stakeholder Produce model answer in conjunction with Stakeholder Agree timescale to quotation period with Stakeholder Agree RFQ Evaluation Meeting</p> | <p>Agreed Date: Cost/Quality Split Agreed Date: RFQ Return Date: Meeting Date: Venue: RFQ Issue Date:</p> | |
| <p>Send agreed RFQ and Evaluation Sheet to Procurement Assistant for issue Questions sent in to Procurement Assistant- responses circulated to all bidders RFQs returned to Procurement Assistant either electronically or hard copy Chair RFQ Evaluation Meeting Produce Evaluation Scoresheet Rank Bidders in order and agree the winner based on Cost/Quality Mix Post Tender Negotiations (by SPU staff only) <i>nb this should only include clarifications and not anything that materially alters the nature of the contract</i> Invite Bidders to Interview if required Take up References if required Produce RFQ Successful Letter- pass to Procurement Assistant for issue Produce RFQ Unsuccessful Letters- pass to Procurement Assistant for issue Requests for debrief to come via email to Procurement Assistant Produce RFQ Debrief Letters- pass to Procurement Assistant for issue If contract required, pass documents through to Legal</p> | <p>Interview Date Date Request Sent Date issued: Date issued: Date issued: Instructions Template Tender (x2 copies) Delegated Decision Date Completed: Date Entered:</p> | |
| <p>Complete Contract Award Notice on Source Derbyshire Enter Contract Details on Contract Register</p> | | |

| FRAMEWORK WORKSHEET | | Notes |
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| <p>Conduct due diligence to ensure framework available for use Make file note showing justification for using a framework Type of Framework</p> <p>If, single supplier: Request Quote for supplies or service required. Go to Line 30.</p> <p>If, multi-supplier: If a contract is required, send Heads Up template to Legal Department If contract valued over £50,000, place on Forward Plan Use Mini-Competition Template and appropriate framework Terms & Conditions Ask Stakeholder to prepare appropriate Specification Agree appropriate Pricing Mechanism Agree Requirement Specific questions Produce final Mini-Competition Cost/Quality Evaluation Sheet in conjunction with Stakeholder Produce model answer in conjunction with Stakeholder Agree timescale to Mini-Competition period with Stakeholder If contract valued over £50,000, inform Democratic Services of tender return date Agree Mini-Competition Evaluation Meeting</p> <p>Invite Legal, Finance, Audit, Members, Stakeholders to Evaluation Meeting Send agreed Mini-Competition and Evaluation Sheet to Procurement Assistant for issue</p> | <p>Original Advert Details: Note Dated: Single Supplier? Multi-Supplier?</p> <p>Date Requested:</p> <p>Date sent: Date sent:</p> <p>Received Date: Agreed Date: Agreed Date: Cost/Quality Split Agreed Date:</p> <p>Mini-Competition Return Date: Date informed: Meeting Date: Venue: Invites sent:</p> <p>Mini-Competition Issue Date:</p> | |

Framework Worksheet Continued

Questions sent in to Procurement Assistant- responses circulated to all bidders
 Mini-Competitions returned in hard copy to Democratic Services
 Tender opening
 Chair Mini-Competition Evaluation Meeting
 Produce Evaluation Scoresheet
 Rank Bidders in order and agree the winner based on Cost/Quality Mix
 Post Tender Negotiations (by SPU staff only)
nb this should only include clarifications and not anything that materially alters the nature of the contract
 Invite Bidders to Interview if required
 Take up References if required
 Take award recommendation to Cabinet for Approval
 Wait for five days for Scrutiny Call-in to pass
 Produce Mini-Competition Successful Letter- pass to Procurement Assistant for issue
 Produce Mini-Competition Unsuccessful Letters- pass to Procurement Assistant for issue
 Requests for debrief to come via email to Procurement Assistant
 Produce Mini-Competition Debrief Letters- pass to Procurement Assistant for issue
 If contract required, pass documents through to Legal

 Inform Framework Owner of results of Mini-Competiton (winning bidder, value of call off, date)
 Enter Contract Details on Contract Register

Interview Date
 Date Request Sent
 Cabinet Minute Number:

 Date issued:
 Date issued:

 Date issued:
 Instructions Template
 Tender (x2 copies)
 Delegated Decision
 Cabinet Minute

 Date Entered:

Tender Worksheet Continued

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| <p>Send agreed Tender and Evaluation Sheet to Procurement Assistant for issue Questions sent in to Procurement Assistant- responses circulated to all bidders Tenders returned in hard copy to Democratic Services Tender opening Chair Tender Evaluation Meeting Produce Evaluation Scoresheet Rank Bidders in order and agree the winner based on Cost/Quality Mix Post Tender Negotiations (by SPU staff only) <i>nb this should only include clarifications and not anything that materially alters the nature of the contract</i> Invite Bidders to Interview if required Take up References if required Take award recommendation to Cabinet for Approval Wait for five days for Scrutiny Call-in to pass Produce Tender Successful Letter- pass to Procurement Assistant for issue Produce Tender Unsuccessful Letters- pass to Procurement Assistant for issue Requests for debrief to come via email to Procurement Assistant Produce Tender Debrief Letters- pass to Procurement Assistant for issue If contract required, pass documents through to Legal</p> <p>Complete Contract Award Notice on Source Derbyshire Enter Contract Details on Contract Register</p> | <p>Tender Issue Date:</p> <p>Interview Date Date Request Sent Cabinet Minute Number:</p> <p>Date issued: Date issued:</p> <p>Date issued: Instructions Template Tender (x2 copies) Delegated Decision Cabinet Minute Date Completed: Date Entered:</p> | |
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| TENDER WORKSHEET | | Notes |
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| <p>Place contract on Forward Plan</p> <p>Only use the yellow PQQ section if following the Restricted Procedure</p> <p>Use PQQ Template and Evaluation Sheet</p> <p>Agree Section 10 "Requirement Specific" Questions with Stakeholder</p> <p>Produce final PQQ Evaluation Sheet in conjunction with Stakeholder</p> <p>Agree timescale for PQQ period with Stakeholder</p> <p>Agree PQQ Evaluation Meeting</p> <p>Send agreed PQQ and Evaluation sheet to Procurement Assistant for issue</p> <p>Agree OJEU Advert Wording</p> <p>Place Advert on SIMAP</p> <p>Place Advert on Source Derbyshire</p> <p>Only use the yellow PQQ section if following the Restricted Procedure</p> <p>PQQs issued by Procurement Assistant responding to Expressions of Interest</p> <p>PQQs returned to Procurement Assistant either electronically or hard copy</p> <p>Chair PQQ Evaluation Meeting</p> <p>Produce Evaluation Scoresheet</p> <p>Rank Bidders in order and agree those going through to tender</p> <p>Produce PQQ Unsuccessful Letters- pass to Procurement Assistant for issue</p> <p>Requests for debrief to come via email to Procurement Assistant</p> <p>Produce PQQ Debrief Letters- pass to Procurement Assistant for issue</p> <p>Use Tender Template and appropriate Goods/Services/Works Terms & Conditions</p> <p>Ask Stakeholder to prepare appropriate Specification</p> <p>Agree appropriate Pricing Mechanism</p> <p>Agree Requirement Specific questions</p> <p>Produce final Tender Cost/Quality Evaluation Sheet in conjunction with Stakeholder</p> <p>Produce model answer in conjunction with Stakeholder</p> | <p>Date sent:</p> <p>Agreed Date:</p> <p>Agreed Date:</p> <p>PQQ Return Date:</p> <p>Meeting Date:</p> <p>Venue:</p> <p>Agreed Date:</p> <p>User Name:</p> <p>Password:</p> <p>User Name:</p> <p>Password:</p> <p>Date issued:</p> <p>Date issued:</p> <p>Received Date:</p> <p>Agreed Date:</p> <p>Agreed Date:</p> <p>Cost/Quality Split</p> <p>Agreed Date:</p> | <p>BolsoverSPU</p> <p>xxxxxxx</p> <p>bob.truswell@bolsover.gov.uk</p> <p>xxxxxxx</p> |

Tender Worksheet Continued

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| <p>Agree timescale to Tender period with Stakeholder If contract valued over £50,000, inform Democratic Services of tender return date Agree Tender Evaluation Meeting</p> <p>Invite Legal, Finance, Audit, Members, Stakeholders to Evaluation Meeting Send agreed Tender and Evaluation Sheet to Procurement Assistant for issue Questions sent in to Procurement Assistant- responses circulated to all bidders Tenders returned in hard copy to Democratic Services Tender opening Chair Tender Evaluation Meeting Produce Evaluation Scoresheet Rank Bidders in order and agree the winner based on Cost/Quality Mix Post Tender Negotiations (by SPU staff only) <i>nb this should only include clarifications and not anything that materially alters the nature of the contract</i> Invite Bidders to Interview if required Take up References if required Take award recommendation to Cabinet for Approval Wait for five days for Scrutiny Call-in to pass Produce Notification of Intention to Award Letter- pass to Procurement Assistant for issue Produce Tender Unsuccessful Letters- pass to Procurement Assistant for issue Ten day standstill period commences Requests for debrief to come via email to Procurement Assistant (by Day 3 of Standstill) Produce Tender Debrief Letters- pass to Procurement Assistant for issue (by Day 7 of Standstill) Check that all debriefs issued and no challenges received by Day 10 of Standstill. If contract required, pass documents through to Legal</p> <p>Complete Contract Award Notice on SIMAP Complete Contract Award Notice on Source Derbyshire Enter Contract Details on Contract Register</p> | <p>Tender Return Date: Date informed: Meeting Date: Venue: Invites sent: Tender Issue Date:</p> <p>Interview Date Date Request Sent Cabinet Minute Number:</p> <p>Date issued: Date issued: End of standstill:</p> <p>Date issued:</p> <p>Instructions Template Tender (x2 copies) Delegated Decision Cabinet Minute</p> <p>Date Completed: Date Entered:</p> | |
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