



Procurement Guidance

| | |
|-----------------------|--------------------------------------|
| Adopted | 4 th August 2025 (149.25) |
| To be reviewed | April 2027 |

This document provides a straightforward process to ensure transparency, fairness, and accountability in purchasing decisions above £250.00 (financial threshold set in F/reg 5.8). Once approved, this becomes an efficient checklist for procurement ensuring a transparent trail of decision-making that can be easily demonstrated if required.

1. Clear and Itemised Specification

To provide a detailed specification / breakdown of all items or services required, with the request for individual pricing for each if required, sent in pdf format to the person / business from whom a quotation has been requested:

- This will ensure that if not all items are eventually procured or if there is a dispute it will be easier to arrive at a value.
- No changes may be made by the bidders to the original document.
- Any suggested alterations or alternatives to the original agreed specification must be included on a separate sheet attached to the quotation and highlighted to the council when considering the quotation. This ensures comparability and simplifies any partial procurement or disputes.

2. Who will be asked to tender and why

A record must be maintained of all parties invited to tender, along with the method used to select them. This includes, but is not limited to:

- Random selection from directories (e.g. online search)
- Personal recommendations
- Local businesses
- Public advertisements – eg: in the noticeboard, in the newsletter, on the website or social media are forms of public advertisements that could be suggested.

3. Expression of Interest

If a contractor or suppliers request to be included in the tendering process they should express their interest in writing, via email, to the Clerk.

4. Openness and Fairness of tendering process

Is the process open to all? If not, a record will be kept clearly explain the rationale for any limitations or exclusions.

5. Advertising

Once the advertisement has been approved the decision of where, cost and duration the opportunity will be advertised will be agreed by council.

6. Questions from Tenderers

Should the tenderers raise questions regarding the specification or the required works these questions should be submitted to the Clerk via email ensuring that:

- All questions and answers are recorded
- All tenderers receive the same information

7. Closing date

The closing date, including date and time, will be clearly stated in the invitation to tender.

8. Tender Information Packs

Packs for tenders will be sent via email, requesting a delivery and read request, or via post.

9. Submission of tenders and sealed bids

- Tenders must be addressed to the Clerk in the ordinary course of post, unless an electronic tendering process has been agreed by the council.
- Where a postal process is used, each tendering firm shall be supplied with a specifically marked envelope in which the tender is to be sealed and remain sealed until the prescribed date for opening tenders for that contract. All sealed tenders shall be opened at the same time on the prescribed date by the Clerk in the presence of at least one member of council.
- Where an electronic tendering process is used, the clerk is to ensure that they are kept in a separate secure folder to ensure that nobody accesses any tender before the expiry of the deadline for submission. The electronic tender is to be clearly marked with the councils' reference and shall be opened on the prescribed date by the clerk in the presence of at least one member of the council.
- Each page of the tender received will be signed and dated by the Clerk and the Councillor present.

10. Evaluation and filtering criteria

The council to discuss and agree clear criteria to filter out non-compliant or unsuitable tenders.

This may include but not limited to:

- Is there a minimum insurance coverage required
- Relevant qualifications or certifications
- Will Trade references be required
- A pricing threshold

- Suppliers / contractors terms
- OR** it is agreed that price is the sole determining factor.

11. Get out Clause

To be agreed if the contract should include a termination clause specifying:

- Notice period required by either party
- Acceptable grounds for termination

12. Contract for works

An acceptance of quotation letter will be sent to the awarded contractor, including, if necessary, all information regarding the project including payment schedule, final specification and planning conditions required to be satisfied by contractor etc. No works will commence until a signed copy, along with required documentation, has been received by the clerk.

Unsuccessful tenders should also be informed of the outcome by the clerk.

Draft Procurement checklist

| | | Tenderers | | |
|---|--------------------|-----------|--|--|
| | Completed (✓/X) | | | |
| Specification prepared and agreed | | | | |
| Quotation/Tender document finalised and agreed including closing date information and submission criteria, if references are required etc. | | | | |
| Tender evaluation – Agreed by council prior to Cllr receiving the tenders. Includes filter criteria: qualifications, references, insurance, pricing, etc. | | | | |
| Supplier List Created Have local businesses been considered, how suppliers / contractors have been selected. | | | | |
| Advertising Approved Council has agreed where, cost and duration, to advertise opportunity. | | | | |
| Advertising live | | | | |

| | | | | |
|--|--|--|--|--|
| Tender pack issued via email or post. | | | | |
| Questions and response All questions and answers documented; responses regarding changes to specification etc / notes following site meetings shared with all. | | | | |
| Tender received via email. Date and time document opened, record cllr present when open. | | | | |
| Tender received via sealed bids Date and time envelope opened, record cllr present when opened. | | | | |
| Tenders Reviewed To be discussed by full Council, record of suitability. | | | | |
| Tender Awarded Contractor and amount in minutes | | | | |
| Contract Awarded documentation prepared and approved Terms, get out clause, payment schedule agreed. | | | | |
| Contract issued for contractor to sign and return No works to begin until this has been received with the requested information. | | | | |
| Signed contract received with requested information eg copy of required insurances etc. | | | | |