



The Langstane Group

Procurement Policy

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Version	Date approved	Changes
Version 1	13 th February 2019	New policy
Version 2	3 rd November 2021	<p>Revisions throughout document to remove reference to European tendering and replace with UK wide tendering requirements following Brexit</p> <p>OJEU tendering thresholds updated</p> <p>Amendment to regulated tender opening procedures to allow procurement consultants to open the Public Contracts Scotland portal on behalf of Langstane</p> <p>Amendment to regulated tender opening to remove the requirement for a Board member to be present at higher value tenders</p> <p>Amendment to Section 26 to require an Annual procurement Report only where regulated spend has exceeded the £5 million threshold</p>

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1. Introduction

Procurement is a highly important activity for Langstane Housing Association Ltd and all subsidiary companies comprising the Langstane Group (hereinafter referred to as ‘the Association’) and has a critical impact on its performance and ability to meet its corporate objectives. The Association currently spends a significant amount of its resources every year on works, goods and services and it is essential that every pound spent derives as much benefit as possible for the Association, its tenants and the wider community.

2. Policy statement / aim of the policy

This policy supports the Association’s Procurement Strategy and aims to ensure that there is clear guidance for staff who have responsibility for making procurement decisions. This policy is supported by a Procurement Manual which provides detailed procedures for all aspects of procurement.

3. Objectives

The objectives of this policy are to:

- Ensure that the Association maximises value for money when procuring contracts
- Ensure that the Association complies with all legal and regulatory requirements, and with best practice guidance, when procuring contracts
- Ensure that procurement complies with the Association’s own policies in respect of payments and benefits
- Maximise opportunities to jointly procure services on a collaborative basis with colleagues in other housing associations or related organisations
- Ensure that procured contracts meet the expectations of tenants, customers, staff, colleagues and /or other key stakeholders
- Ensure continuous improvement of the Association’s procurement service through on-going monitoring and reporting of procurement activities to Senior Management and the Board of Management

4. Links to other policies

This policy should be read in conjunction with:

- Business Plan 2018-2023
- Procurement Strategy – which sets out the Association’s 5 year vision for procurement
- Procurement Programme – which details the approved procurement activities for the coming 3 years
- Procurement Manual – which provides detailed guidance on all aspects of procurement
- Financial Regulations
- Scheme of Delegation
- Delegated Authority Levels
- Anti-Bribery Policy
- Entitlements, Payments and Benefits Policy
- Community Investment Strategy

5. Overview of Legislation

Defined as a “Public Body Governed by Public Law”, the Association has procurement duties placed on it by a number of different pieces of legislation:

Procurement Reform (Scotland) Act 2014

- A duty to publicly procure services / goods contracts over £50,000 in value and works contracts over £2m in value
- A duty to act in a transparent and proportionate manner and to carry out regulated procurement in a way that treats economic operators equally and without discrimination
- A duty to comply with sustainable procurement obligations
- Where procurement spend will exceed £5m in any year, a duty to publish a Procurement Strategy and review it annually
- Where procurement spend has exceeded £5m in any year, a duty to publish an Annual Procurement Report reviewing our procurement activities in that year against our procurement strategy
- A duty to publish regulated procurement opportunities and contract awards on the Public Contracts Scotland website
- A duty to consider community benefit requirements for all procurement with an estimated contract value over £4m
- A duty to provide feedback to unsuccessful bidders
- The duty to keep and maintain a publicly available contracts register

Procurement (Scotland) Regulations 2016

- A duty to carry out public procurement of contracts with a value over £50k for goods / services and £2m for works but below the EU thresholds (see below) in accordance with the requirements set out in the Regulations which cover:
 - How contract value is estimated
 - Contract process (Prior Information Notices (PINs), contract notices, splitting contracts into lots etc)
 - Rules for awarding contracts without competition
 - Mandatory and optional reasons for excluding bidders
 - Rules for preparing technical specifications

Public Contracts (Scotland) Regulations 2015

- A duty to publicly procure services / goods contracts exceeding the Official Journal of the European Union (OJEU) threshold of £189,330 and works contracts exceeding the OJEU threshold of £4,733,252. OJEU thresholds will continue to apply after the United Kingdom leaves Europe as these are aligned to World Trade Organisation rules on procurement which will continue to govern UK procurement.
- A duty to comply with the general principles of:
 - Transparency – contract procedures must be transparent and contract opportunities should generally be published
 - Equal treatment and non-discrimination – potential suppliers must be treated equally
 - Proportionality – procurement procedures and decisions must be proportionate
 - Mutual recognition – equal validity must be given to qualifications and standards from other Member States, where appropriate

- A duty to carry out the procurement in accordance with the requirements set out in the regulations which covers:
 - How contract value is estimated
 - Types of procurement (open, restricted, negotiated etc.)
 - Contract process (PIN, contract notices, splitting contracts into lots etc.)
 - Procedures for awarding contracts
 - The process for bidders to raise proceedings against a contracting authority

6. Procurement routes

The various pieces of legislation and the Association's own policy requirements result in the Association procuring in a three tier regime. For the remainder of this policy, and in accompanying procedures, these tiers will be referred to as:

Route 1 unregulated procurements under £50,000 in value which are governed by the Association's own policies and procedures but do not fall within the scope of any of the above legislation. Route 1 procurement is further sub-divided into Route 1a to Route 1d depending on the value of the works. The requirements for each of these procedures are noted in the table below.

Route 2 Regulated procurement with a value over £50,000 (for goods and services) or £2m (for works) but below the OJEU thresholds.

Route 3 Regulated procurement over the OJEU threshold

The table below sets out the required procurement route depending on the anticipated value of the contract and whether it is classed as goods, services or works and the applicable legislation and internal policies and procedures to be complied with:

Anticipated Value	Applicable legislation	Tender procedure
Goods, services & works £0 - £1,000	LHA policies & procurement manual	Before carrying out any tender procedure, staff should check whether the goods, services or works can be provided through an existing contract
Goods, services & works £1,000 - £5,000	LHA policies & procurement manual	ROUTE 1A Written quotation from a minimum of one supplier. See Procurement Manual

<p>Goods, services & works £5,000 - £20,000</p>	<p>LHA policies & procurement manual</p>	<p>ROUTE 1B</p> <p>Three competitive quotes to be obtained from suppliers on the approved list. Where the work is specialist and cannot be procured through the approved list, external suppliers may be asked to quote but must complete the approved suppliers process before being appointed.</p> <p>The first choice should be to tender via Quick Quotes on PCS. Requesting quotes via e-mail or by mail is acceptable where there are no suitable suppliers on Quick Quotes</p> <p>Consider the use of existing frameworks where appropriate</p> <p>See Procurement Manual</p>
<p>Goods, services & works £20,000 - £50,000</p>	<p>LHA policies & procurement manual</p>	<p>ROUTE 1C</p> <p>Tendered via Quick Quotes on PCS</p> <p>Consider the use of existing frameworks where appropriate</p> <p>See Procurement Manual</p>
<p>Goods & services £50k - £189,330*</p>	<p>LHA policies & procurement manual Procurement (Scotland) Regulations 2016 Procurement Reform (Scotland) Act 2014</p>	<p>ROUTE 2</p> <p>Procurement requires a Pre-procurement Plan (PPP) with Director approval</p> <p>Advertise tender on PCS</p> <p>Consider the use of existing frameworks where appropriate</p>
<p>Goods & services over £189,330*</p>	<p>LHA policies & procurement manual Public Contracts (Scotland) Regulations 2015 Procurement Reform (Scotland) Act 2014</p>	<p>ROUTE 3</p> <p>Procurement requires a PPP with Director approval</p> <p>Works to be advertised on the Find a Tender (UK wide) system via PCS</p>
<p>Works £50k - £2m</p>	<p>LHA policies & procurement manual</p>	<p>ROUTE 1D (Follow Route 2 procedures)</p> <p>Procurement requires a PPP with Director approval</p>

		Works to be advertised in PCS to maximise competitiveness of quotes
Works £2m - £4,733,252*	LHA policies & procurement manual Procurement (Scotland) Regulations 2016 Procurement Reform (Scotland) Act 2014	ROUTE 2 Procurement requires a PPP with Director approval Works to be advertised in PCS
Works over £4,733,252*	Public Contracts (Scotland) Regulations 2015 Procurement Reform (Scotland) Act 2014	ROUTE 3 Procurement requires a PPP with Director approval Works to be advertised on the UK wide Find a Tender system via PCS
Where contracts are broken into lots (for instance kitchen replacement programme broken in to lots by area):		
Goods and service lots over £70,778*	LHA policies & procurement manual Public Contracts (Scotland) Regulations 2015 Procurement Reform (Scotland) Act 2014	ROUTE 3 UK wide Find a Tender Procurement as above Consider the use of existing frameworks where appropriate
Works lots over £884,720*	LHA policies & procurement manual Public Contracts (Scotland) Regulations 2015 Procurement Reform (Scotland) Act 2014	ROUTE 3 UK wide Find a Tender procurement as above Consider the use of existing frameworks where appropriate

*Current OJEU thresholds applying from 1st January 2020

No contract value should be artificially divided to circumvent the thresholds set out by the Procurement Reform (Scotland) Act 2014 or the Public Contracts (Scotland) Regulations 2015.

All values are net of Value Added Tax (VAT)

Anticipated values should be calculated over the possible length of contract, so if the contract will last three years with the potential for two extension years, the value should be calculated over the full five years.

Where a proposed contract is 'mixed' e.g. it contains works and services / goods or goods and services, it should be classified according to the main subject of the contract. For example a contract to carry out electrical safety inspections (a service) and electrical repairs arising from the inspections (works) would be classed as a service contract, as that is the main function of the contract and the repairs are a by product.

7. Procurement Responsibilities

The Board of Management

The Board is responsible for:

- Ensuring that the Association is compliant with legislative and regulatory requirements in respect of procurement
- Approving the Procurement Policy, Procurement Strategy (and annual reviews of the Strategy) and the Annual Procurement Report
- Approving any authority delegated to staff in respect of procurement activity
- Reviewing the Tender Register quarterly

The Audit Committee

The Audit Committee is responsible for:

- Ensuring the Association complies with its Procurement Policy and any procedures in relation to procurement

The Director of Finance & Corporate Services

The Director of Finance & Corporate Services has overall responsibility for setting the strategic and policy approaches to procurement including:

- Overseeing the implementation and review of this policy
- Overseeing the implementation and review of the Procurement Strategy and accompanying action plan
- Producing the Annual Procurement Report
- Carrying out annual spend analysis to identify procurement priorities and updating the Procurement Programme

Senior Management Team

The Senior Management Team are responsible for the day to day application of the procurement policy and procedures within their teams.

Staff

The Association does not have a dedicated procurement team and so staff throughout the organisation will have responsibility for the procurement of any goods, services and works required by their team.

Procuring staff are responsible for:

- Preparing a Pre-procurement Plan for every procurement activity with a value over £50,000 and ensuring this is approved by their Director prior to progressing with the procurement
- Identifying a suitable scoring panel for the procurement activity
- Preparing tender documentation
- Responding to any questions from bidders
- Corresponding with bidders to advise of outcomes of each procurement stage
- Co-ordinating the appointment of the successful bidder/s including drafting formal Letters of Appointment, Contracts, Service Level Agreements or any other appointment documents that are required. All appointment documents should be signed by a member staff with the relevant delegated authority level prior to being issued. Where appropriate, documentation must be recorded in the Signings Register.

Procuring staff will usually also be responsible for the on-going management of the contract but where they are not, they must arrange for a robust handover of the contract to the responsible staff member.

Procurement Champions

In order to ensure that procurement is carried out effectively and consistently across the organisation, every procurement activity over £20k (goods / services) or £50k (works) will have a Procurement Champion assigned to it. Procurement Champions are members of staff who have received additional training on procurement and will provide guidance on administrative aspects of procurement including:

- Completion of the pre-procurement Plan and ensuring that sufficient analysis has been carried out prior to the procurement activity progressing
- Checking of procurement documents to ensure they meet with the Association's standards and comply with legislation
- Uploading documentation onto PCS and updating PCS to show when contracts are awarded or procurement processes are cancelled
- Coordinating the assessment of tenders and chairing consensus scoring meetings
- Ensuring communications such as standstill letters and notifications to successful and unsuccessful bidders are compliant

8. Conflicts of interest

Procuring staff must immediately advise their Director, and Board members must alert the Chief Executive, if they become aware of a conflict of interest arising due to a close relationship between a staff or Board member and a potential supplier.

Tender documentation should always explicitly state that conflicts of interest that the supplier may be aware of due to a close relationship with a staff or Board member must be declared in advance of a contractual relationship being established.

Any conflict will be noted in the Register of Interests and the staff or Board member with the potential conflict will be distanced from the procurement activity to ensure they

cannot influence the outcome of the activity. The conflict will be reported to the Board of Management in accordance with the Entitlements, Payments & Benefits Policy.

Any failure by a supplier to highlight a potential conflict of interest may lead to their exclusion from a public procurement exercise. They, and any associated businesses, may be subsequently disqualified from competing for any current and future contracts. Legal advice will be taken where this is considered appropriate.

Any failure by a member of staff to declare an interest or highlight a relationship which may present a conflict of interest will be dealt with through the Association's disciplinary procedures.

9. Fraud / bribery

In accordance with the Anti-Bribery Policy, staff must immediately advise their Director, and Board Members must alert the Chief Executive, if they become aware of an attempt by any supplier to influence a procurement decision by way of inducement or otherwise.

Canvassing of staff or Board members by suppliers for any contract is expressly forbidden and a standard clause is included in all procurement documents to make this clear. Suppliers who have behaved in this way will be excluded from the procurement process and subsequently may be disqualified for competing for other current and future contracts. Legal advice will be taken where this is considered appropriate.

Similarly, suppliers must alert the Chief Executive and or Chairperson if inducement is sought by any staff or Board member. Such action breaches the Association's Code of Conduct and will be dealt with through the Association's disciplinary procedures.

10. Procurement Programme

LHA will maintain a Procurement Programme which will detail the main procurement activities to be undertaken each financial year. This programme will be presented to Board of Management for approval alongside the annual budget.

Unforeseen procurement activities which arise during the financial year and are not on the Procurement Programme must be individually presented to, and approved by, Board of Management before being added to the Procurement Programme and (if relevant) incorporated into the annual budget.

11. Procurement categorisation

All procurement activities in the procurement programme will be categorised as Routine, Managed or Strategic based on their value and risk to the Association:

Procurement Categories

1	Routine
2	Managed
3	Strategic

Increasing Risk ↑	H	2	3	3
	M	1	2	3
	L	1	1	2
		L	M	H
	→ Increasing Value			

Categorising the procurement activities ensures that the potential risks of the procurement are considered at an early stage and adequate time and resources can be allowed for the procurement process.

It also ensures that the required level of contract management can be assessed to ensure that sufficient contract management requirements (Key Performance Indicators (KPIs), progress meetings etc) are included in the tender documents so that, once up and running, the contract can be delivered effectively to achieve maximum value for the Association and its tenants.

The procurement categories are noted below along with the required level of contract management that is expected for each procurement type:

Routine contracts

Contracts that are low value and low risk will usually be classed as Routine. This can cover items that are non-business critical or have an abundant supply base, such as stationery. Procurement for items under £20k for services / goods and £50k for works will also be classed as Routine.

Contract management for Routine contracts will include gathering management information, monitoring high-level performance against time, cost and quality and maintaining an overview of any key risks.

Managed contracts

Managed contracts are those where the value and/or risk are classed as medium to high. Continuity of supply will be important to the Association and so effective contract management will be important. Managed contracts will include specialist consultancies and some works term contracts.

Contract management for Managed contracts will include regular progress meetings (usually monthly) and a formal performance review meeting (usually at the end of each year), use of formal KPIs, tenant satisfaction feedback and use of a Risk Register where appropriate.

Strategic contracts

Strategic contracts are those that are high value and high risk and where continuity of supply is essential to the organisation and so robust contract management is critical. Strategic contracts will often have a risk of breaching legislation or impacting on performance standards if poorly managed. Strategic contracts will include new build developments, planned maintenance, gas servicing, cleaning & gardening contracts and key business services such as complex IT software where poor contract management could result in loss of IT access and inability to deliver core services to tenants.

Contract management for Strategic contracts will be similar to that used for managed contracts but will often include more regular reviews of performance (for instance through regular site visits for works contracts) in addition to progress meetings. The complexity of the contract may require the use of external / specialist contract management assistance, for instance through the appointment of a QS to assist with cost control on a works / services contract.

The procurement manual sets out the different contract management approaches in more detail but the main aim is to ensure that contract management is sufficient to ensure effective delivery of the works / goods or service contract while remaining proportionate to the nature of the project.

12. Pre-Procurement Plans (PPP)

Where a procurement activity has a value over £50,000, the staff member responsible will prepare a PPP which ensures that due consideration is given to:

- The current contracts relating to the goods / services or works and issues that need to be taken into account for the upcoming procurement
- Options to deliver the contract in-house (for example through the Association's DLO) or to consolidate a number of contracts into one
- Options for collaborative procurement, either through existing frameworks or through new joint procurement opportunities
- Market analysis to assess the number of potential suppliers and whether the opportunity is likely to attract competitive tenders
- The desired outcomes of the upcoming procurement
- The risks associated with the procurement
- The requirement for any specialist procurement assistance and associated costs
- Which KPIs are required to ensure contract performance can be managed effectively
- Who will sit on the scoring panel and whether tenants / Board members will be involved in the assessment
- Sustainable procurement considerations including opportunities to reduce waste, energy consumption and emissions through the specification
- Opportunities to encourage SME participation, for instance by splitting contracts into lots
- Opportunities for community benefits
- Proposed award criteria and price / quality ratio
- Project programme and key milestones

The preparation of a PPP ensures that procuring staff consider all possible risks and benefits associated with the procurement activity and structure the procurement in a way that maximises value for money to the Association, its tenants and the wider community, whilst complying with all the various duties inferred on the Association by procurement legislation.

PPPs must be signed off the by the relevant Director prior to the procurement activity progressing.

13. Joint procurement

The Association will maximise opportunities for joint procurement with other housing associations or related organisations where appropriate. In all cases, where new contracts are required, or existing contracts are being retendered, procuring staff will explore opportunities for joint procurement at the Pre-procurement Planning stage.

Where services are jointly procured the association will ensure that, as far as reasonably practical, it does not assume any liability for non-payment or withdrawal from a joint contract by another party.

Partnership / Collaborative working

All decisions to enter into a partnership or collaborative agreement must be approved by the Board of Management who must be satisfied that the arrangements represent best value for the Association taking into account strategic and operational considerations. The minimum period for a partnership agreement will usually be three years and the maximum period will usually be seven years.

Package deals

This describes a situation where a developer approaches the Association and offers a site for development but on the condition that they are the developer and as such there is no competitive process in respect of the building contract. All decisions to enter into a package deal must be approved by the Board of Management who must be satisfied that such an arrangement demonstrates best value for the Association taking into account operational and strategic considerations.

14. Framework agreements

Rather than conducting a stand-alone procurement procedure for required goods, services or works, procurement through a framework agreement may be considered.

A framework agreement is an 'umbrella agreement' that sets out the terms (particularly relating to price, quality and quantity) under which individual contracts (known as call-offs) can be made throughout the period of the framework agreement (normally a maximum of 4 years).

Framework agreements can be set up for one contracting authority to use or can be set up to allow call-offs by multiple contracting authorities. The Association may set up its own framework agreement or may call-off from an existing framework agreement managed by a third party, such as the Scottish Procurement Alliance (SPA) or Scotland Excel.

Calling-off contracts from an existing framework agreement has the advantage of saving the Association time and resource and may offer the opportunity to take advantage of any economies of scale achieved by the framework agreement.

However, frameworks can be unresponsive to change and it can be difficult to assess value for money if there are limited suppliers offering services through the framework. The use of frameworks therefore needs to be very carefully considered and only used where they offer clear and demonstrable benefits.

15. Procurement Exceptions Reports (PERs)

There are exceptional circumstances where quotations or tenders will not be required including:

- Where procurement activity was undertaken but there were no suitable bids or notes of interest.
- Where the contract can only awarded to a particular supplier for technical or artistic reasons or where there are exclusive rights in respect of the required goods, services or works
- Where the work is required urgently, for example due to H&S / Structural or other concerns
- Where the Association already has a contract in place for similar works and that contract can be modified or amended to include this work, but the following must apply:
 - the new goods, services or works are a repetition of the goods, services or works in the original contract and conform with the project for which that contract was awarded
 - the original project indicated the extent of possible additional works or services and the conditions under which they would be awarded
 - the possible use of this procedure was disclosed in the procurement documents and the total estimated cost of subsequent works or services was taken into consideration by the contracting authority when determining the estimated value for the purpose of applying section 3(1)(b) of the Act in relation to the original contract; and
 - not more than three years has elapsed following the conclusion of the original contract

Above exceptions should only be relied upon in limited circumstances and the procuring staff member must obtain a quotation for the item in question and complete a Procurement Exceptions Report (PER) for approval by their Director prior to progressing with the purchase of the relevant goods, service or works. The PER ensures that Value for Money is still a consideration despite the absence of competition.

16. Business continuity

Where the Business Continuity Plan is in operation and there is a health and safety risk identified (for example there is damage to office space and/or to systems that may affect business continuity), the normal timescales for procuring may be relaxed to meet business requirements. For example the need for a PPP may be dispensed with and quotes may be obtained direct from approved suppliers rather than using Quick Quotes. The procedure to be used will depend on the specific business continuity issue and will be agreed by the Business Continuity team as soon as the plan is enforced. Any decisions made must be in compliance with procurement legislation.

17. Renewals, extensions and amendments to existing contracts

A proposed extension, renewal or amendment to an existing contract might, in some circumstance, be considered equivalent to awarding a new contract if it constitutes a material change. If such a change to an existing contract has the effect of creating a new contract then the Association may need to undertake a competitive tender process in accordance with the relevant legislation, depending on the contract value, to avoid breaching legislation.

Material changes to a contract are those which demonstrate the intention of the parties to renegotiate the essential terms of the original contract. Amendments to a contract may be regarded as 'material' where they:

- **Introduce conditions** which, had they been part of the initial award procedure, would have allowed for the admission of tenders other than those which were admitted, or would have allowed for the acceptance of a tender other than the one initially accepted – in other words the new conditions would have potentially changed the participants in, or the outcome of, the original procurement exercise.

Examples include extensions to the contract period which were not detailed in the original contract, or price increases, although low value price modifications are acceptable as long as they meet the following guidelines:

- The value of the amended procurement would still fall below the relevant procurement threshold and
- is less than 10% of the initial contract value for supplies and services contracts or 15% of the initial contract value for a works contract
- **Extend the scope** of the contract considerably to include services not initially covered
- **Change the economic balance** in favour of the supplier in a manner not provided for in the terms of the original contract – in other words, they make changes which improve the suppliers position or alter the balance of risk under the contract in favour of the supplier and so might have encouraged other suppliers to participate in the original procurement – examples include extensions to the contract period or price increases or removal of certain performance requirements.

Any staff member considering modifying a contract in any way must discuss this with the Director of Finance & Corporate Services in the first instance.

18. Transfer of Undertakings (Protection of Employment) (TUPE) Regulations

The TUPE Regulations aim to protect employees who are working on contracts which may be transferred from one supplier to another. As part of the PPP preparation staff must give careful consideration as to whether TUPE is likely to apply to their procurement activity or not. Where procuring staff consider that TUPE will apply, this must be made clear in the procurement documentation and staff should seek to include as much information as possible on the potential impact on the new supplier (for instance including likely numbers of staff to be transferred and an indication of terms and conditions of staff) to allow potential suppliers to accurately reflect any TUPE costs in their tender.

All TUPE information and contract clauses must be checked by the Association's solicitor prior to the procurement activity being advertised.

19. Procurement procedures

The Association has produced a Procurement Manual to provide detailed guidance to procuring staff on all aspects of the procurement process. This manual is intended to ensure that there is a consistent and compliant approach to procurement throughout the organisation and must be followed. The following sections of this policy summarise some of the key processes involved in the different routes of procurement:

19.1. General principles applicable to all procurement Routes

There are a range of general principles which apply and which must be considered by the Association in relation to the procurement of all contracts regardless of the estimated value of the contract and/or whether the procurement activity is regulated or non-regulated:

- No tender should be accepted where there is insufficient budget to pay for the goods, service or works.
- In general the supplier / contractor should provide sufficient financial information to allow them to be added to the approved contractors list including, as appropriate, copies of financial accounts and bank references. If there is any doubt as to the financial stability of the contractor / supplier further checks, such as credit checks, should be carried out by the Finance Department prior to the appointment of the contractor / supplier. The right to carry out such financial checks must be written in to all tender documentation.
- Any selection and award criteria must be clearly specified in the tender documents.
 - Selection criteria relate to the SPD stage of the tender and are the eligibility criteria used to determine a bidders ability to provide the goods, services or works. These will include qualifications, experience and financial standing.
 - Award criteria relate to the ITT documentation and are used to identify the Most Economically Advantageous Tender (MEAT)
- Tenders will not normally be accepted on the basis of cost alone (although this may be acceptable for most non-regulated tenders). Quality, cost and the ability to deliver an excellent customer-focussed product or service should all be assessed.
- Tender documentation should always include a clause which allows the Association to exclude abnormally low or abnormally high tenders (usually 15% lower or higher than the next tender)
- All tenders should be recorded in the Tender Register
- Details of all awarded regulated contracts should be recorded on the Association's Contracts Register.
- Tender documentation forms part of the contract documentation and should be kept on file for a period of six years after the end date of the contract.
- An appropriate written contract must be used and this must be concluded with the correct legal entity. For very minor works the legal contract may simply be an exchange of letters.

- Contracts should be signed only by a member of staff with the correct level of delegated authority. The signing of formal contracts should be recorded in the Signings Register.
- Any complaint about, or challenge to, a contract award procedure or any situation which could reasonably be expected to lead to a complaint or challenge must be notified to the Director of Finance & Corporate Services as soon as known
- Details of prices or other sensitive information submitted by a supplier must not be disclosed to any other supplier.

The following section summarises the procedures to be followed for Route 1, 2 and 3 procedures. The Association's Procurement Manual provides further detail on each Route and should be referred to by all procuring staff during the procurement process.

20. Route 1 procedures

Appendices 1 to 4 detail the procedures for administering Route 1A to 1C non-regulated procurement below £50,000 in value. Route 1D procedures (for works over £50k but below £2m) should be run in accordance with Route 2 procedures.

Route 1 procedures will normally either involve inviting quotations directly from approved suppliers in writing or by e-mail, or inviting tenders via Quick Quotes on Public Contracts Scotland. Where appropriate to do so it may also be reasonable to advertise tender opportunities through housing publications, particularly where the opportunity relates to specialist consultancy services.

Receipt and opening of tenders below £50,000 should be recorded in the quotes register.

21. Route 2 and 3 procedures

21.1. Stages of procurement

All regulated procurement will be administered using the Public Contracts Scotland portal.

Regulated procurement will involve two distinct activities:

Single Procurement Document (SPD) – this document is a standard document that must be completed by all bidders. The SPD is a self-declaration of the businesses' financial status, abilities and suitability for a public procurement procedure.

An SPD guidance document will be provided to bidders detailing any pass/fail requirements on the SPD and any questions in the SPD that will be scored. The SPD responses are assessed and only bidders who meet the selection criteria are invited to progress to the Invitation to Tender (ITT) stage.

The Invitation to Tender (ITT) stage is where the contracting authority sets out their requirements (the specification) and bidders submit their proposals for meeting these requirements. The ITT stage will normally focus on two aspects:

Quality – the contracting authority will consider what the most important aspects of the contract are to them, and ask the bidders how they can ensure they can deliver these aspects. For instance, if customer service is important, the Association might ask bidders to confirm how they will ensure high rates of customer satisfaction, or ask bidders how they would respond to a specific customer service situation.

Most contracts will require no more than 6 quality questions and bidders should be provided with clear guidance on what scores are to be awarded to each question.

Price – the Association will set out how it wants price to be submitted. This can be done in a number of ways:

- Hourly or daily rate (this will most commonly be used for specialist consultants)
- % fee (this will most commonly be used for professional fees, such as architects)
- Schedule of rates

The bidder must be advised how the prices will be assessed.

21.2. Methods of procurement

The SPD and ITT activities can be combined in different ways depending on the complexity of the items being purchased. There are six allowable procurement methods which are summarised below. Open and Restricted methods may be used freely. Justification is required for using any of the other methods.

Open (Route 2 & 3) – single stage procedure combining the Single Procurement Document (SPD) and ITT stages into one process. Generally an open procedure should be used when tenders will be easy to evaluate. As all bidders will submit both an SPD and ITT this procedure should not be used where a high number of respondents is expected and it will usually not be appropriate for complex tender procedures.

Restricted (Route 2 & 3) – two stage procedure requiring bidders to submit SPD information in the first stage. Bidders who meet the minimum requirements in this stage (a minimum of five unless fewer suitable candidates meet the selection criteria) progress to the Invitation to Tender (ITT) stage and are asked to submit quality and cost information. The restricted procedure will be appropriate for tender procedures where a high number of responses are expected.

Competitive Dialogue (Route 3) – this procedure can only be used where certain criteria are met, for instance the market cannot readily meet the Association's requirements, the procurement requires an innovative solution or an open or restricted procedure has failed to result in a successful award.

Competitive Dialogue starts with an SPD stage to select appropriate suppliers, and then progresses to an Invitation to Take Part in Dialogue (ITPD) stage, where suppliers will be provided with the Association's requirements and will develop initial solutions. The Association will enter into dialogue with the bidders, choosing to eliminate any that don't satisfactorily meet the requirements. This dialogue stage can be repeated multiple times.

Once dialogue has been concluded, bidders will be issued an Invitation to Submit Final Tenders (ISFT) and from the submissions, the Most Economically Advantageous Tender (MEAT) will be chosen.

This route will be appropriate for projects such as bespoke IT requirements where a number of different solutions would work for the Association. It is however costly and resource intensive for both the Association and bidders and will extend the procurement timescales so should only be used where simpler approaches will not produce effective results.

Competitive with negotiation procedure (Route 3) – this procedure is similar to the competitive dialogue method but introduces dialogue after final tenders have been submitted.

This method starts with an SPD stage to select appropriate suppliers, who are then invited to submit final tenders based on ITT documentation. After evaluation of the tenders, the Association may decide to award the contract, or may negotiate on an equal basis with all bidders. There are no prescribed timescales for negotiation but the bidders must be advised at the outset of the timescales and processes to be used. When the Association decides to conclude negotiations, all bidders must be given a common deadline to submit new or revised tenders and the Association must award the contract to the Most Economically Advantageous Tender.

Innovation Partnership (Route 3) – this procedure must only be used where there is a need for the development of an innovative product or service and the subsequent purchase of these cannot be met by solutions already available on the market. The use of this procedure must be justified.

As with all methods, the Innovation Partnership starts with an SPD selection stage which must take into consideration the bidders capacity in research and development and the development of innovative solutions.

Eligible bidders are then invited to work with the Association to develop the solution.

This is done in successive phases with clear targets to be achieved at the end of each phase. Innovation Partnership procedures will normally involve some remuneration to bidders in recognition of the cost of developing a new product.

After each phase, the Association has the option to terminate the partnership or reduce the number of partners by terminating individual contracts by applying the award criteria, provided that this possibility has been indicated in the Procurement Documents.

The contracts must be awarded on the sole basis of the best price-quality ratio.

Negotiated Procedure without Prior Publication (Route 3) - This last procedure can only be used in very limited and exceptional circumstances. Professional procurement or legal advice or guidance is advised prior to adopting this process. The Association will not have cause to use this procedure.

21.3. Procedures

Public Contracts Scotland – regardless of the method of procurement that is being used, the contract notice, SPD, tender documentation and any accompanying contract documentation must be published on the Public Contracts Scotland website. Tenders which require to be published on the UK wide ‘Find a Tender’ system are automatically forwarded to the system based on the anticipated value of the tender.

When setting up the contract notice, procuring staff must ensure that bidders are advised to submit any clarifications through the Public Contracts Scotland website and these clarifications and all answers will be available to all bidders to ensure transparency and anonymity.

Bidders should also be advised that they must submit their tender submissions through the PCS portal.

At the completion of the procurement procedure, whether a bidder is appointed to the contract or the procedure is abandoned, a contract award must be published

SPD - as outlined previously, all procurement procedures will involve bidders having to complete an SPD. This is a standard document but the procuring staff member should consider which questions within the SPD are relevant to the particular procedure, and prepare a guidance document advising bidders which questions to respond to. Any unused questions should be scored out rather than deleted. The guidance document should also advise bidders of any pass/fail requirements and any questions that will be scored, and what scoring methodology will be used. The guidance document should also make clear any requirement for bidders to provide evidence of accreditations or qualifications or to provide any other enclosures. The SPD and guidance document should be checked by the Procurement Champion and approved by the Department Director before being published.

ITT documentation - the procuring staff member, quantity surveyor or suitably qualified consultant will prepare a robust tender specification / project brief to be incorporated into the ITT. The template contract must be issued with the ITT (incorporating the specification). The tender documentation should give all bidders sufficient and equal opportunity to submit relevant information and must enable the tenders to be evaluated on an equitable basis. Details of how submissions will be assessed must be clearly set out. Details and conditions for the service (such as performance requirements, contract management requirements etc) must be set out accurately and concisely in order to avoid ambiguity and later disputes over interpretation of what is required under the contract. All tenders should contain a certificate of bona fide tendering (Template is provided in the Procurement Manual).

Depending on the nature of the service, procuring staff may also wish to include interviews or site visits as part of the tender process and this must be included in the tender documentation, including any scoring associated with these.

Receipt of Tenders – At each stage of a regulated tender procedure, following the deadline for submissions, a date and time should be agreed for the opening of the Public Contracts Scotland portal to release the submissions.

Two members of staff will be required to unlock the portal at all stages. For all regulated procurements the following opening procedures should be followed::

Regulated procurement value:	SPD stage	ITT stage (or single stage tenders)
£50k+	Two members of staff to unlock portal One member of staff should be at Director level or above Opening to be recorded in the tender register	Two members of staff to unlock portal One member of staff should be at Director level or above Opening to be recorded in the tender register

Opening requirements if using a procurement consultant

Where an external procurement consultant is administering the procurement on Langstane's behalf it will not be possible for a staff member to unlock the portal – unlocking should be carried out by the consultant and copies of all bidder documentation should be sent to Langstane after the opening for filing in Langstane's procurement files.

Evaluation - A scoring panel with a minimum of three members will be established for each procurement activity. Scoring panel members should ideally have some technical knowledge of the goods / services or works being procured and may include staff, Board members, tenants, consultants and others with specialist knowledge of the service being tendered. All members of the scoring panel will be required to declare any interest or connection with any individual, firm or company intending to tender for the provision of the required services.

SPD – the procuring staff member will check the SPD submissions against the pass / fail criteria and check that bidders have provided all required enclosures. Clarification e-mails will be sent to any bidders who have failed to provide information, requesting the missing information and giving a clear deadline for receipt of the missing information. All bidders should be given the same deadline. The scoring panel should only score the SPD questions which have scores attached.

ITT – The procuring staff member, Quantity Surveyor or specialist consultant will assess the priced element of the tender. If there are discrepancies in the pricing the bidder should be contacted and advised of the discrepancy and asked to confirm acceptance of the corrected amount. If the bidder does not confirm acceptance their tender will be rejected.

The scoring panel will assess the quality element of the ITT. Again, where there is a requirement for clarification of any of the questions these clarifications should be issued to the relevant bidders with a deadline for responding.

At both the SPD and ITT stages the scoring panel members will independently score submissions and make notes on the reasons for awarding their scores. The Procurement Champion for the activity will collate the scores and chair a consensus meeting at which final scores will be agreed. Averaging of scores will not be used.

The Association's template scoring spreadsheet should be used to record SPD, quality and price scores. The contract will normally be awarded to the Most Economically Advantageous Tender.

An unsuccessful bidder can request feedback on their submission, or challenge a decision, and so the scoring panel must ensure that robust records are kept on the scoring methodology.

All feedback to bidders on their scores (whether successful or unsuccessful) should be carried out electronically.

Contract award – for Route 3 notices (those over EU thresholds) the relevant standstill period must be observed before awarding a contract. Following a recommendation by the procuring staff member or consultant the tender will be accepted and signed on behalf of the Association by the Department Director or Chief Executive. The Corporate Services manager will retain a copy of all paperwork for audit purposes in accordance with the document retention schedule.

21.4. Other considerations for Route 2 and Route 3 procedures

The Procurement Reform (Scotland) Act 2014 places a duty on the Association to consider the following when carrying out regulated procurement procedures:

Sustainable procurement

The Procurement Reform (Scotland) Act 2014 infers on the Association a duty to consider sustainable procurement issues before carrying out a regulated procurement. The Association must consider how, in conducting the procurement process it can —

- improve the economic, social, and environmental wellbeing of the authority's area,
- facilitate the involvement of small and medium enterprises, third sector bodies and supported businesses in the process, and
- promote innovation

The PPP for each procurement activity will give due consideration to the economic, environmental and social impact of the procurement and whether the procurement activity can have a positive impact on any or all of these issues.

Community benefits

Community benefit clauses can be used to build a range of social, environmental or economic conditions into a procurement activity.

LHA will comply with its legal duty to consider the use of contractual community benefit clauses in all regulated procurements with a value of £4m or greater. In order to maximise the potential for community benefit, LHA will aim to include core or non-core community benefits in all goods / services contracts with a value over £50k and works contracts with a value over £500k.

- **Core community benefits** are defined as benefits which are specifically included in contract particulars, are directly linked to the core purpose of the procurement and are considered in the assessment / award of the contract.

Examples of core community benefits include:

- training / apprenticeship opportunities on construction contracts
- providing careers advice at a school fair as part of a legal services tender
- decorating a community room as part of a cyclical painting contract
- **Non-core community benefits** are defined as benefits that cannot be directly linked to the core purpose of the contract. Rather than being specifically requested, suppliers are asked to make proposals and these are then incorporated into the contract of the successful supplier. Non-core benefits cannot be considered in the assessment / award criteria.

Community benefits must be proportionate to the value of the contract being procured.

Core community benefit clauses must have a direct link to the core purpose of the contract.

Only core community benefits can be used as part of the assessment / award criteria. Non-core community benefit proposals can be requested as part of the procurement but cannot form part of the award criteria

22. Electronic Communication

As of the 18th October 2018, all communication in relation to regulated procurement must be carried out electronically. The Association will utilise PCS to meet this requirement. All tender clarifications, standstill notices and contract award / unsuccessful notices will be issued by e-mail.

22.1. Contracts Register

The Association maintains a Contracts Register in accordance with the requirement set out in the Procurement Reform (Scotland) Act 2014. The Contracts Register records all contracts awarded as a result of regulated procurement. The Contracts Register is publicly available on the Association's website and the Public Contracts Scotland website.

22.2. Contract award & Contract Management

This sections sets out the key considerations for staff when awarding and managing the contract.

22.3. Contract documents to be issued as part of tender procedure

The Association will use the relevant standard template form of contract for its procurement. The relevant standard template form of contract should be reviewed and amended as appropriate to reflect the terms of the contract being required and the Association's particular requirements. Any amendments to the relevant standard template form of contract must be approved by the Director of Finance before the form of contract is issued along with the tender documentation.

Once the template contract has been published as part of the procurement process it cannot later be changed.

22.4. Contract award

Following evaluation of tender responses and application of award criteria, all tenders will be scored and a contract award decision will be made.

Contracts must not be awarded until such time as all required documentation is presented to, and checked by, the Association. For example method statements, risk assessments, etc. A suitably qualified employee/ consultant will undertake this task.

Payment for contracts shall only be made in accordance with the conditions contained within the contract specifications and on the submission to the Association of a detailed statement of account in an approved format.

Contract variations will only be accepted for payment on the provision of an approved Variation Order signed by a staff member with the relevant delegated authority.

All contracts will be monitored in accordance with the procedures stated within the contract specification documents, which should generally allow for regular progress meetings and monitoring of key performance indicators. Any issues will be immediately highlighted to the relevant Manager or Director.

A formal Performance Review will be undertaken at the end of every year of the contract period to document the effectiveness of the service provided and to record the level of satisfaction with the supplier.

Before any service is subjected to a repeat tendering exercise a review shall be undertaken to assess:

- the benefits of further competitive tendering;
- qualitative outcomes;
- alternative options for the service provision;
- changes which should be made to the previous tendering procedure; and
- changes to the format and content of the specifications and tender documents.

22.5. Contract Management

The Association's ability to modify publicly procured contracts is restricted by legislation. Any staff member considering modifying a publicly procured contract, must discuss this in the first instance with the Director of Finance & Corporate Services.

Where there is a material breach of contract this will be reported to the next relevant Resources Committee.

In instances where there is reason to believe that:

- The supplier is going into receivership or administration;
- The supplier is actively looking to sell or merge its business; or
- The supplier is ceasing to trade, or threatening to cease trading

The Association will take immediate steps to formally investigate the above and if necessary, to take positive steps to minimise any potential detriment to the

Association and its customers. This may include ensuring that another supplier completes current contracts. Where a merger takes place, an automatic transfer of all on-going contracts will take place only if the Association is clear that the same contract terms and conditions will be met. This includes levels of customer satisfaction.

Where the working practices of a supplier fall short of the standards expected by the Association, the Association will take steps to improve the situation. However, at no time will the Association allow its reputation to be diminished by the activities of a supplier and in this event; active steps will be taken to terminate any contracts held.

Where the above is suspected or taking place, then the Scottish Housing Regulator should be advised in accordance with guidance in respect of 'Notifiable Events'.

23. Procurement Strategy

The Association's spend as a result of regulated procurement is in excess of £5m per year and so, in accordance with the requirement set out in the Procurement Reform (Scotland) Act 2014, the Association has prepared, and will annually review, its Procurement Strategy. The Strategy is publicly available on the Association's website.

24. Annual Procurement Report

Where the Association's spend as a result of regulated procurement is in excess of £5m per year and so, in accordance with the requirement set out in the Procurement Reform (Scotland) Act 2014, the Association will, at the end of each financial year, prepare an Annual Procurement Report which summarises:

- The preceding year's procurement activities and compliance with the Procurement Strategy
- Community benefits obtained through procurement activities
- Steps taken to facilitate procurement from supported business
- Likely procurement requirements over the coming two years

25. Monitoring and review

This policy will be reviewed at least every three years and beforehand if changes to legislation require it.

Right to complain

In the event you are not satisfied with the service you have received, please contact the Association for a copy of the Complaints Policy. This can also be viewed on Langstane Housing Association's website – www.langstane-ha.co.uk.

Equality and diversity

The Langstane Group / Langstane Housing Association is committed to promoting equality and diversity across all areas of work. Discrimination or harassment of any kind is not tolerated.

If you would like this document sent to you in large print, please contact Support Services on 01224 423000.

Route 1 Non-regulated tender procedures – general requirements

1. The Association will ensure that all bidders who are asked to submit a quote for a tender procedure are issued the same documentation
2. The procedure applies to all non-regulated tender activities carried out by the Association and is therefore relevant to development, property services, asset management, finance, IT and housing staff
3. Where an electronic form of tendering is not being used, any issued documentation will be accompanied by a green tender envelope marked “FOR QUOTATION” with the Tender number, issuing department, closing date and return address (usually the Association’s Head Office). Bidders will be required to submit their quotes in this envelope and failure to do so may render their tender inadmissible.
4. Tender envelopes handed in to reception will be accepted by frontline staff who will issue a duplicate receipt as evidence that the quotation has been received. Tender envelopes must not be opened. They should be handed to HR & Corporate Services Manager (or Finance Manager in their absence) for safe keeping until the date and time of the tender opening.
5. Tender envelopes received by post will have the top copy of a duplicate receipt stapled to the envelope, which will be handed to the HR & Corporate Services Manager (or Finance Manager in their absence) for safe keeping until the date and time of the tender opening.
6. Late quotations will only be accepted where an extension of time has been granted to the bidder in advance. The same extension of time must be granted to all bidders. Any extension of time must be recorded on the tender register.
7. The quotes register is held electronically on the G:/Public drive.
8. All quotations under £50,000 in value must be recorded on the quotes register.
9. The register will record the contract name, date, estimated value, companies invited to tender, the prices returned and a list of those present at the opening.

Route 1a tender procedure for goods, services or works with an estimated value of £1,000 to £5,000

1. Single quotations

1 quotation is required and may be requested by the Association in writing or via e-mail.

It will be based on a specification (or detailed description of the works, goods or services required) and will be issued by a member of staff with the relevant delegated authority level.

Quotations should generally be sought from companies who are already on the association's approved contractors list. If there is not an appropriate contractor on the approved list, new contractors may be invited to join the list by completing an approved contractors application form and providing sufficient financial and health & safety information. Contractors should not be invited to provide quotations until they have provided this information.

Verbal quotes are not acceptable. Email submissions and paper submissions are acceptable.

Because only one quote is being requested, this can be returned directly to the member of staff carrying out the procurement, either by post or to their e-mail address. If more than one quote is being requested for items at this value, the procedure at Appendix 3 should be used.

If the quotation is acceptable, it should be accepted in writing, either by post or by e-mail. If the quotation is not acceptable, the staff member must request a quote from another supplier or should consider requesting a number of quotes in accordance with the procedure set out at Appendix 3.

Route 1b tender procedure for goods, services or works with an estimated value of £5,000 to £20,000 by e-mail or in writing

1. Invitation

A minimum of 3 quotations are required and the preference will be to obtain these through Quick Quotes although in writing or via e-mail will also be acceptable. For Quick Quotes tender procedures – see Appendix 4

They will be based on a specification (or detailed description of the works, goods or services required) and will be issued by a member of staff with the relevant delegated authority level.

Quotations should generally be sought from companies who are already on the association's approved contractors list. If there is not an appropriate contractor on the approved list, new contractors may be invited to join the list by completing an approved contractors application form and providing sufficient financial and health & safety information. Contractors should not be invited to provide quotations until they have provided this information.

The member of staff inviting the quotations will advise frontline reception staff of the forthcoming opening and advise of arrangements for any quotations which are handed in at reception or arrive in the mail (this will not be necessary if quotes are being returned by e-mail).

2. Submission

Verbal quotes are not acceptable. Email submissions and paper submissions are acceptable.

Paper submissions should be returned in the tender envelope provided.

Email submissions must be in pdf format and returned to the Association's dedicated tender e-mail (procurement@langstane-ha.co.uk), accessible only by Corporate Services staff and the Finance Manager.

3. Acceptance

The envelope with the paper quotation should be marked "QUOTATION RETURN" and should reference the Quotation number, closing date, issuing department and return address. When the bidder hands the quotation in at reception they will be issued with a receipt and the Association's receipt copy will be stapled to the envelope to evidence the date and time that the quotation was returned.

Reception staff will advise the HR & Corporate Services Manager (or Finance Manager in their absence) to collect the envelope and it will be stored with the Manager until the opening.

4. E-mail quotations

E-mail quotations should be sent to the procurement@langstane-ha.co.uk e-mail address which is only accessible by Corporate Services staff and the Finance Manager. The e-mail quotation will remain unopened until the quotation opening.

5. Opening

Following the deadline for receipt of quotations the HR & Corporate Services Manager will forward the envelopes / e-mails to the member of staff administering the work to arrange for these to be opened.

The member of staff who requested the quotations will prepare the Quotes Register for opening, print out e-mail quotations and arrange a date and time for the opening in the presence of a Line Manager with the relevant delegated authority.

All tenders / quotations should be recorded in the Quotes Register which will note:

- Contract / Quotation number
- Description of item being tendered
- Estimated value
- Date and time of receipt of tenders
- Names of parties submitting quotations / tenders
- Prices returned
- Any qualifications
- Date and time of opening
- Persons present at opening

6. Notification

All parties who submitted an unsuccessful quotation should be advised in writing or by e-mail

The successful quotation will be accepted in writing or by e-mail

Route 1b and Route 1c tender procedure for goods, services or works with an estimated value of £5,000 to £50,000 using Quick Quotes

1. Invitation

A minimum of 3 quotations are required and will be requested via the Quick Quotes function on the Public Contracts Scotland website.

They will be based on a specification (or detailed description of the works, goods or services required) and will be issued by a member of staff with the relevant delegated authority level.

Quotations should generally be sought from companies who are already on the association's approved contractors list, many of whom are already registered on the Public Contracts Scotland website.

If there is not an appropriate contractor on the approved list, new contractors may be invited to provide a quote but must complete an approved contractors' form and provide sufficient financial and H&S information as part of the tender process.

2. Submission

Invited contractors / suppliers will return their tenders to the electronic postbox on the Public Contracts Scotland website.

This must be set up to require two members of staff to unlock it.

3. Acceptance

All submissions will be submitted electronically and so the date and time of submission will be recorded automatically on the PCS portal. Bidders will receive an automatic receipt upon submission of their bid. Submissions are not accessible by staff until the deadline has passed.

4. Opening

The member of staff who requested the quotations will prepare the Quotes Register for opening and arrange a date and time for the unlocking of the secure PCS postbox in the presence of appropriate personnel depending on the anticipated value of the work. Items with an anticipated value up to £30,000 must be opened in the presence of the Department Manager. Items with an anticipated value of over £30,000 must be opened in the presence of the Department Director.

All tenders / quotations should be recorded in the Quotes Register which will note:

- Contract / Quotation number
- Description of item being tendered
- Estimated value
- Date and time of receipt of tenders

- Names of parties submitting quotations / tenders
- Prices returned
- Any qualifications
- Date and time of opening
- Persons present at opening

5. Notification

Once a successful bid has been identified, the tender should be awarded using the Quick Quotes award function. This will automatically notify the successful bidder that their quote has been successful, and let other bidders know that they have been unsuccessful.