



Quotation and Tenders Policy

Introduction

The Council from time to time needs to obtain quotes and tenders to complete its aims and objectives. The Council is committed to spending public money wisely, efficiently and to achieve best value. Neither the Council, nor any committee, is bound to accept the lowest tender. All issue and acceptance of tenders and quotes shall be subject to the overriding principle of "Best Value".

This policy will complement the Council's Standing Orders and Financial Regulations.

Purpose

The purpose of this policy is to ensure that:

- The Council procures supplies, services and works that meet the defined and agreed essential needs of the Council as specified in the quotation or tender documents.
- In all cases, a specification is produced and agreed prior to the quotation or tender documents being issued that clearly identifies the essential requirements (needs), along with the highly desirable (discretionary added value) and desirable (wants);
- The selection criteria are clearly identified.
- The tender or quote is selected which offers the best value to the Council over the whole life of the project;
- The tendering process, selection of bidders and the award of contracts are fair, open and objective;
- All tenders and quotes are evaluated to a consistently high standard;
- Equality, diversity and sustainability consideration are embedded in the Councils tendering and quotation processes.



Quotations

The formal quotation process shall comprise of the following steps:

- i. A specification of the goods, materials, services shall be drawn up following the template below:

"Illogan Parish Council are seeking quotes for (detailed description, including sizes, addresses etc).

Please include with your quote an explanation of how you will complete the work, copies of your Health and Safety Policy, sample risk assessment and copies of competence certificates for the machinery that will be used.

We strongly suggest and encourage you to visit the site to view the work for yourself.

The successful contractor will need to provide copies of insurance, health and safety policies and risk assessments prior to commencing any work.

Quotes must be received by (date and time)

If you have any queries or would like to arrange an attended site visit, please do not hesitate to contact me."

- ii. The Council reserves the right to discount and not consider any quotations received after the specified deadline.
- iii. A public notice for quotes estimated to exceed £100 will be placed on the Council's website and Facebook page and if appropriate in the Illogan Review.
- iv. Once received the quotes will be assessed by the Full Council or relevant Committee.
- v. Once quotes have been discussed a contractor will be appointed by resolution of the Council/Committee.

Tenders

The formal tender process shall comprise of the following steps:

- i. A specification of the goods, materials, services shall be drawn up;
- ii. A tender pack will be compiled which will consist of a minimum of a job specification, health and safety requirements, a copy of the Councils Management of Contractors Policy and any other appropriate policies. It will also contain relevant timescales and all appropriate deadlines, tender return sheet, details of when, how and where to return the tender. The Council reserves the right to discount and not consider any tenders that are received after the deadline, not in the specified format or that are incomplete. A public notice of the tender will be placed on the Council's Facebook



page and website and if appropriate in the Illogan Review and anywhere else necessary such as Contract Finder.

- iii. Tenders that are submitted in hard copy are opened by two Councillors and the Clerk after the stated closing date and time. The Councillors will number and sign each tender opened.
- iv. Tenders that are received electronically will be left unopened, the Clerk will open the electronic submissions in the presence of two Councillors after the stated closing date and time. The Councillors will number and sign each tender they witness opened.
- v. The Clerk will produce a report on the tenders received and will circulate the report and copies of the tenders to members with the agenda and background papers for the meeting at which they will be discussed.
- vi. Once opened the tenders will be assessed by the Full Council or relevant Committee.
- vii. Once tenders have been discussed a contractor will be appointed by resolution of the Council/Committee.

Interviews

Illogan Parish Council may invite companies/persons who have submitted a quote or tender to attend an interview. There will usually be a minimum of 2 Councillors and the Clerk present during the interview. The Councillors will conduct the interview and the Clerk will take notes. Interviews will usually be held in the Council Office.

The Council will give a minimum of three working days' notice of the date and time the interview will be held.

The Council will not reimburse any travel or other expenses that may be incurred in attendance at the interview.

Tender Days

A tender day is where all interested contractors will have the opportunity to attend the site with at least 2 members of the Council at a certain day and time.

The Group will walk around the site with the Council representatives explaining what needs to be done as specified in the tender document. This allows all the contractors to be told the same information and to enable them to ask questions. Where possible all questions will be answered during the meeting; if any questions are unable to be answered straight away, the information will be found once the Council's representatives return to the Office and the answer will then be sent by an appropriate method to everyone who attended the tender day.

All questions asked, and the answers given will be recorded by the Council's representatives. After the 'tour' is completed the questions and answers will be compiled, typed up and circulated to all contractors interested in the work.



Tenders/Quotes Not Received or Are All The Same

If no tenders or quotes are received the Council will:

- Re-advertise using the methods already used.
- Consider other methods of advertising i.e., newspaper, radio, other local media.
- Consider advertising further afield i.e., in the Western Morning News, other national websites/media publications etc.
- Review the tender/quotation documents and the Council's requirements.
- Contact contractors who have requested the tender and quotation documentation and enquire as to why they did not submit a tender or quote.

If the tenders or quotes received are identical the Council will:

- Assess each quote or tender individually.
- Consider 'Best Value'.
- Consider requesting additional information from each contractor.
- Consider holding an interview with each contractor.
- Reassess all of the tenders against the additional information and/or interview and Best Value.
- Complete background research on the contractors, such as looking at Facebook comments, reviews online etc.
- Complete a VAT Registration check on all contractors via www.gov.uk/check-uk-vat-number
- Complete a Company check via www.gov.uk/get-information-about-a-company or via Companies House
- Complete a financial check on contractors via www.gov.uk/find-out-if-a-company-is-in-financial-trouble
- Request examples, including photographs of similar works previously completed.

Other

The Council will compile a list of contractors who would be interested in tendering or quoting and what areas of work they could cover and that they would be able to comply fully with all Health and Safety requirements, any other relevant legislation and Council policies. Any relevant quotes or tenders will be circulated to all appropriate contractors on the list.

The Council will not accept or consider quotes or tenders, or award contracts to any Councillors serving on Illogan Parish Council or their immediate family members.

The Council will, as and when appropriate, place an article in the Illogan Review or other suitable publication to:



- Advertise any current invitations for quotations or tenders.
- Advertise any quotes or tenders anticipated in the next 6 months; and to
- Invite contractors to register an interest in submitting either quotes or tenders to the Council and the areas they could cover.

Quotation and Tender packs can be circulated by email providing parts of the documents are locked such as the specifications and the tenderers can only amend and complete the appropriate sections of the documentation.

Emergency Situations

The Council will compile a list of contractors to contact in emergency situations. An emergency situation is any situation that requires immediate action and cannot wait for authorisation at a Full Council or Committee meeting. The Clerk will report all emergency works completed at the next meeting of the Full Council or appropriate Committee. Examples of emergency situations could include a tree that has been damaged and unexpectedly become dangerous, a water leak in the office; an electrical fault; any unexpected situation which could cause harm to councillors, employees, contractors, or members of the public etc.

Payments

If awarded a contract, Illogan Parish Council will pay for services rendered against an invoice for the work. Council Officers and Councillors will inspect the work and confirm that they are happy with it before agreeing to pay invoices, any rectification that needs to be made must be made before payment. Invoices should be sent once work has been completed.

The Council endeavour to pay all invoices by faster payment.

There is one payment run per month usually during the third week of the month.

Retention - Illogan Parish Council reserve the right to retain a maximum of 5% of the total cost for a period of six months for contracts exceeding £25,000.

Review Date	Reviewed By	Amendments	Minute Number