



## Quotation and Tenders Policy

### Introduction

This policy outlines the procedures for obtaining quotations and tenders for goods, services, and works procured by the Parish Council. The aim is to ensure transparency, fairness, and value for money in all purchasing decisions.

### General Principles

- The Parish Council will adhere to legal requirements and best practices when procuring goods and services.
- Procurement decisions will be based on quality, cost-effectiveness, suitability for purpose, and service quality. The Council, nor any committee, are not bound to accept the lowest quote or tender. All issue and acceptance of tenders and quotes shall be subject to the overriding principle of "Best Value".
- Conflicts of interest must be declared and managed appropriately.
- The Council will maintain appropriate records of quotations and tenders received.
- The Council reserves the right to not consider any quotes or tenders that are received after the deadline, not in the specified format or that are incomplete.
- Public notice of quotes and tenders for works estimated to be over £1,000, will be placed on the Council's Facebook page and website and if appropriate in the Illogan Review and anywhere else necessary such as Find a Tender.

### Thresholds for Procurement

- **Up to £499:** A single written quote may be obtained.
- **£500 - £3,000:** Council Officers shall seek at least 3 fixed price quotes.
- **£3,001 - £25,000:** Council Officers shall seek at least 3 fixed price quotes.
- **Above £30,000 including VAT:** the council must comply with any requirements of the Legislation<sup>1</sup> regarding the publication of invitations and notices.
- **For contracts estimated to exceed £60,000 excluding VAT:** Council Officers shall seek formal tenders from at least three suppliers and advertise an open invitation for tenders in compliance with any relevant provisions of the Legislation. Tenders shall be invited in accordance with the Council's Quotations and Tenders Policy.



## 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 and a breakdown of the man hours, materials etc.*

*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 the Office."*

- ii. Quotes must include a breakdown of man hours, materials etc.
- iii. Once received the quotes will be assessed by either the Full Council or relevant Committee.
- iv. 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:
  - The job specification<sup>7</sup>
  - health and safety requirements
  - a copy of the Councils Management of Contractors Policy
  - any other appropriate policies
  - relevant timescales and all appropriate deadlines
  - details of when, how and where to return the tender.



- iii. Tenders must include a breakdown of working hours, materials etc
- iv. Officers will acknowledge receipt of tenders, 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.
- v. Once opened the tenders will be assessed by the Full Council or relevant Committee.
- vi. 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.

## Outline: Criteria for Considering Quotes and Tenders

### 1. General Requirements

- Compliance with the request for quotation (RFQ) or tender specifications
- Submission within the deadline



- Completeness of documentation and required certifications

## **2. Pricing and Cost Considerations**

- Competitive pricing compared to market rates
- Transparency in cost breakdown
- Inclusion of all necessary taxes, duties, and fees
- Payment terms and conditions

## **3. Quality and Specifications**

- Conformance to required technical specifications
- Quality of materials, products, or services offered
- Compliance with industry standards and regulations

## **4. Supplier's Experience and Reputation**

- Previous experience with similar projects
- References and customer testimonials
- Financial stability of the supplier

## **5. Delivery and Lead Time**

- Ability to meet required delivery timelines
- Logistics and transportation capabilities
- Flexibility for urgent or bulk orders

## **6. After-Sales Support and Warranty**

- Warranty period and conditions
- Availability of technical support or customer service
- Maintenance and repair services if applicable

## **7. Compliance and Risk Management**



- Adherence to legal and regulatory requirements
- Insurance coverage and risk mitigation strategies
- Ethical and sustainability considerations

## **8. Contractual Terms and Conditions**

- Clarity of terms and conditions
- Liability clauses and dispute resolution mechanisms
- Termination and renewal provisions

## **Tenders/Quotes Not Received or Are All The Same**

If no tenders or quotes are received the Council may:

- Re-advertise using the methods already used.
- Consider other methods of advertising
- 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 all the same, the Council will invite all contractors to attend the Council Office to discuss the quote/tender, review the documentation, sustainability etc. the Council will then:

- Consider the discussion outcomes
- Consider 'Best Value'.
- 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](http://www.gov.uk/check-uk-vat-number)



- Complete a Company check via [www.gov.uk/get-information-about-a-company](http://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](http://www.gov.uk/find-out-if-a-company-is-in-financial-trouble)
- Request examples, including photographs of similar works previously completed.
- Request references.

## 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. Contractors on the list will be contacted annually to confirm their inclusion on the list, to ensure that the list remains up to date and relevant.

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.

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.

## Exemptions to the Policy

- Emergency procurement where delays could result in significant risk to property or individuals.
- Proprietary goods or services with no viable alternatives.
- Existing contracts where extension is more cost-effective than re-tendering.

## 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.

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