

ST DENNIS PARISH COUNCIL



Quotations Policy

Introduction

St Dennis Parish Council from time to time will try to seek quotations 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 quotation or tender. All issuing of contracts and acceptance of quotes shall be subject to the overriding principal of “Best Value”.

This policy aims to give effect and comply with section 135 of the Local Government Act 1972 and the Public Contract Regulations 2015, the Council’s Standing Orders and Financial Regulations.

Purpose

The purpose of this policy is to provide Guidance on the factors that will be considered when purchasing goods or services.

The Council procures supplies, services and works that meet the defined and agreed essential needs of the Council, in cases where appropriate a specification will be produced and agreed prior to quotation or tender documents being issued, these will clearly identify the essential requirements (needs), along with the highly desirable (discretionary added value) and desirable (wants).

Persons involved in the awarding of a contract on behalf of the Council must ensure that best value for money is obtained.

All tenders and quotes are evaluated to a consistently high standard.

Equality, diversity and sustainability consideration are embedded in the Council’s tendering and quotation processes.

Exceptions from any of the following provisions of these contract procurement rules may be made under the discretion of the Council where they are satisfied that the exception is justified in special circumstances.

Quotations

The formal quotation process shall comprise of the following steps:

- i. An issue is identified and discussed by the relevant Committee or the Council and either the Clerk is instructed, or a working party assembled to investigate the options available.
- ii. Recommendations are bought back to the Council or relevant Committee and a set of specifications are created to send out for quote or tender.

- iii. For goods or services estimated to exceed £1,000 a quotation pack will be compiled which will consist of a minimum of a job specification, health and safety requirements, and any other appropriate policies, timescales and all appropriate deadlines.
- iv. Details of when, how and where to return the quote will be provided. Any quotations that are not received in the specified format will be excluded and not considered by the Council.
- v. A notice for quotes estimated to exceed £5,000 will be placed on the Council's notice boards, website and Facebook page and if appropriate in the Village newsletter.
- vi. Once received the quotes will be assessed by the Full Council or relevant Committee.
- vii. Once quotes have been discussed a contractor will be appointed by resolution of the Council/Committee.
- viii. An official order or letter will be issued for all work or service paid for by the Council. All Councillors and officers are responsible for obtaining good value for money at all times. An officer placing an order on behalf of the Council will ensure that good value and appropriate terms are obtained for the transaction.
- ix. Orders for the values £500 to £1,000 require a minimum of two quotations; for values above £1,000 three quotations are required.
- x. All estimates will be approved by the Council; while the Council is not obliged to accept the lowest quotation, the reasons for accepting the quotation will be recorded.

Contracts between £5,000 and £25,000.

Contracts exceeding £5,000 require additional safeguards and will follow Proper Practice. Written specifications of the Council's needs will be provided, works will be advertised in local publications on the Council's website and advertisement on the contract finder page will be considered. Written quotations will be sought from at least 3 suitable individuals or organisations. Unless the expertise required is within a specialist field and then at the discretion of the council a minimum of two detailed quotations will be sought.

Contracts above £25,000 (procedure led by legislation) as below.

The formal tender process shall be followed for all works or contracts likely to exceed £25,000.

The formal tender process shall comprise of the following steps:

- i. A specification of the goods, materials, services and the execution of works 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, 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, including how to mark the envelope that the quotation will be returned in.
- iii. All quotes must be received by the Clerk. Any quotations received in an unmarked envelope will be excluded and not considered by the Council.
- iv. A public notice of the tender must be made inviting persons/companies to apply for the opportunity to tender.
- v. Every contract that exceeds £25,000 and is either for the execution of work or supply of goods or materials, shall provide for payment of liquidated damages by the contractor in case the terms of the contract are not performed.
- vi. Contracts over the value of £25,000 shall comply with articles 109 to 114 of the Public Contract Regulations 2015 regarding the advertising of contracts and the use of the 'contract finder' website.

- vii. Tenders submitted are to be opened by a Councillor and the Clerk after the stated closing date and time. The Councillor will number and sign each tender opened. 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. Tenders will be opened by Councillors on a rota basis.
- viii. Once opened the tenders will be assessed by the Full Council or relevant Committee.
- ix. Once tenders have been discussed a contractor will be appointed by resolution of the Council/Committee.
- x. A Councillor is not permitted to issue a verbal order, an official written order or make any contract or commitment on behalf of the Council.

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. local newspapers, other national websites/media publications etc.
- Review the tender/quotation documents.
- 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 i.e. how they propose to complete the work, timescales, staffing etc.
- Consider holding an interview with each contractor.
- Request copies of health and safety information and any other relevant information etc.
- Reassess all of the tenders against the additional information and/or interview and Best Value

Acceptance of quotations and tenders

- i. Tenders should be scored against a predetermined, weighted list of requirements agreed by the Council / Committee as part of the procurement process before tenders are received. The basis of this exercise shall be explained in any invitation to tender documentation. Any omission or question raised by the Council or contractor will be made available to all the tenderers.
- ii. The tender that scores the highest will be accepted.
- iii. No negotiation on contracts whose value is more than £25,000 can take place without reference to the Chair of the Council and the Chair of Finance, General Purpose & Audit Committee. Any negotiation that would distort competition is expressly forbidden.
- iv. Any arithmetical errors found when checking tenders received will be pointed out to the tenderer who will be offered the opportunity to either.
 - Stand by the original submission.
 - Correct the tender.
 - Withdraw the tender.

Signing and sealing of contracts

Every successful quotation / tender shall be accepted in writing, by the Clerk.

Other

The Council will compile a list of contractors who would be interested in tendering or quoting, what areas of work they could cover and that they would be able to fully comply with all health and safety requirements. Any relevant quotes or tenders will be circulated to all appropriate contractors on the list. The Council will, as and when appropriate, place an article in the Village newsletter or other suitable publication to:

- Advertise any current invitations for quotations or tenders.
- Advertise any quotes or tenders anticipated in the next 6-month period.
- 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 bidders/contractors may 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, contractor or members of the public etc. This policy will be reviewed annually.

Coordinate work with the contractor

Once the order has been placed, the Parish Council office (on behalf of the Council/committee) will provide an order number for that specific contract. Before the job begins the contractor will be asked to provide details of their public liability insurance and any risk assessments or method statements appropriate to the work, which the Parish Council office will retain.

The Parish Council office and contractor will work together to coordinate all activities, to make sure that the work can be done safely and without risks to health. The Parish Council office staff will regularly meet with the contractor throughout the length of the contract to review the work or issues as they may arise.

If things go wrong, e.g. near misses, accidents, ill health, the Parish Council office (on behalf of the Council) will investigate what went wrong and what can be done to prevent it happening again, informing the appropriate outside bodies if required. The Parish Council office will inform the Chair and Vice Chair and any other appropriate persons promptly and will report to the Full Council as soon as is practicable. The Parish Council office will discuss the findings of any investigation with the contractors.

Payment

Once the work has been completed to a satisfactory standard the contractor can invoice for the work. The Parish Council reviews invoices on a monthly basis, this is usually the first Tuesday of each month.

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