

## **PURCHASING & TENDERING POLICY**

Issue Date: 01.04.2021

### **PURPOSE**

The purpose of this policy is to ensure that ELATT has a fair, transparent and appropriate purchase and tendering policy and procedure for the procurement of goods and services. The key principles of our policy are:

- Transparency
- Proportionality
- Equal treatment
- Non-discrimination
- Fair and open competition
- Good value for money
- Environmental sustainability

The key principle is that all purchase of goods and services over £5,000 should be tendered with evidence of tendering through written estimates.

Closed Invitation to Tender lists may be used for the purchase of all goods and services above £5,000 up to the EU threshold. All procurement above this threshold must be publically tendered through an OJEU advert and official journal of the European Union.

In all cases the Policy requires receipt of at least three quotes wherever there are at least three potential suppliers of those goods or services. The three written quotations received for goods/services need to be a good indication of a representative sample of costs and quality in the current market place as well as having environmental credentials.

All Invitations to Tender above the projected value of £25,000 are to be cleared with the Chief Executive before they are issued.

### **TENDER DESIGN BRIEF, SUBMISSION AND REPORTING**

A design brief is to be prepared for all tenders.

This should be as clear, short and concise as possible.

A structure should be used that makes it easy to compare all submissions and mark all points (e.g. "address all of the following questions in the order in which they are set").

All design briefs should state clearly:

- The time and date by which the replies should be submitted
- That the organisation reserves the right to discard all late submissions
- The format in which the submissions are to be made

All Invitations to Tender are to be cleared with the appropriate member of the Senior Management Team before they are issued.

The relevant Sub Committee Chair, and the members of the relevant Sub Committee, are to be kept informed of the development of design briefs and invitations to tender that affect their portfolio.

The results of all tender submissions are to be reported, for information, on a quarterly basis, to the relevant Sub Committee.

This policy is non-contractual and may change from time to time.

## TENDER SUBMISSION

- All tenders are to be returned directly to the Finance Manager or their nominated representative.
- All tenders are to be opened at a pre-agreed time in the presence of two members of staff, one of whom must be a member of the Senior Management Team.
- All tenders above the value of £35,000 are to be opened in the presence of at least one Trustee and the relevant staff.
- A record must be made of all returns to each tender.

The pro-forma should record:

- The title of the tender
- The date of the submission deadline
- The name of each organisation bidding for the work
- The value/cost of their quotation

## RELATED PROCEDURES AND OTHER DOCUMENTS

- Business Plan
- Financial Regulations
- Environmental Policy

## RESPONSIBILITY FOR THE PROCEDURE

The Finance Manager is responsible for the implementation and review of this policy.

## SUSTAINABILITY

ELATT is a 'Green Mark' organisation and as such should endeavour to buy sustainable green products and services whenever possible. Key suppliers should be surveyed to find out about their environment credentials. Examples of green products and services are: recycled office stationery, green energy providers, printers using vegetable-based inks, fair trade refreshments for office and learner consumption, environmentally conscious cleaning products, energy efficient photocopiers etc.

## INVITATION TO TENDER DOCUMENTS

Document	Description
ITT (£5k to £25k)	Standard quotation document – minimum of 2x quotations with a typical expectation of 3x quotations.
<a href="#">ITT (£25k to EU threshold)</a>	Introduction, acknowledgement, general conditions of contract for the supply and installation of goods, standard terms and conditions of contract. Instructions to tenderers, specification and/or statement of requirements, price schedule.
<a href="#">ITT (over EU threshold)</a>	OJEU advert (and published to official journal of European Union), introduction, acknowledgement, general conditions of contract for the supply and installation of goods, standard terms and conditions of contract and evidence of financial standing. Plus instructions to tenderers, specification and, or statement of requirements, price schedule, statement relating to good standing, insurance, deed of guarantee, certificate of bona fide offer, indemnity, sub-contractors, race relations, freedom of information, all appropriately amended by user for the subject matter and the scoring criteria and methodology for tender.
Open procedure	

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