

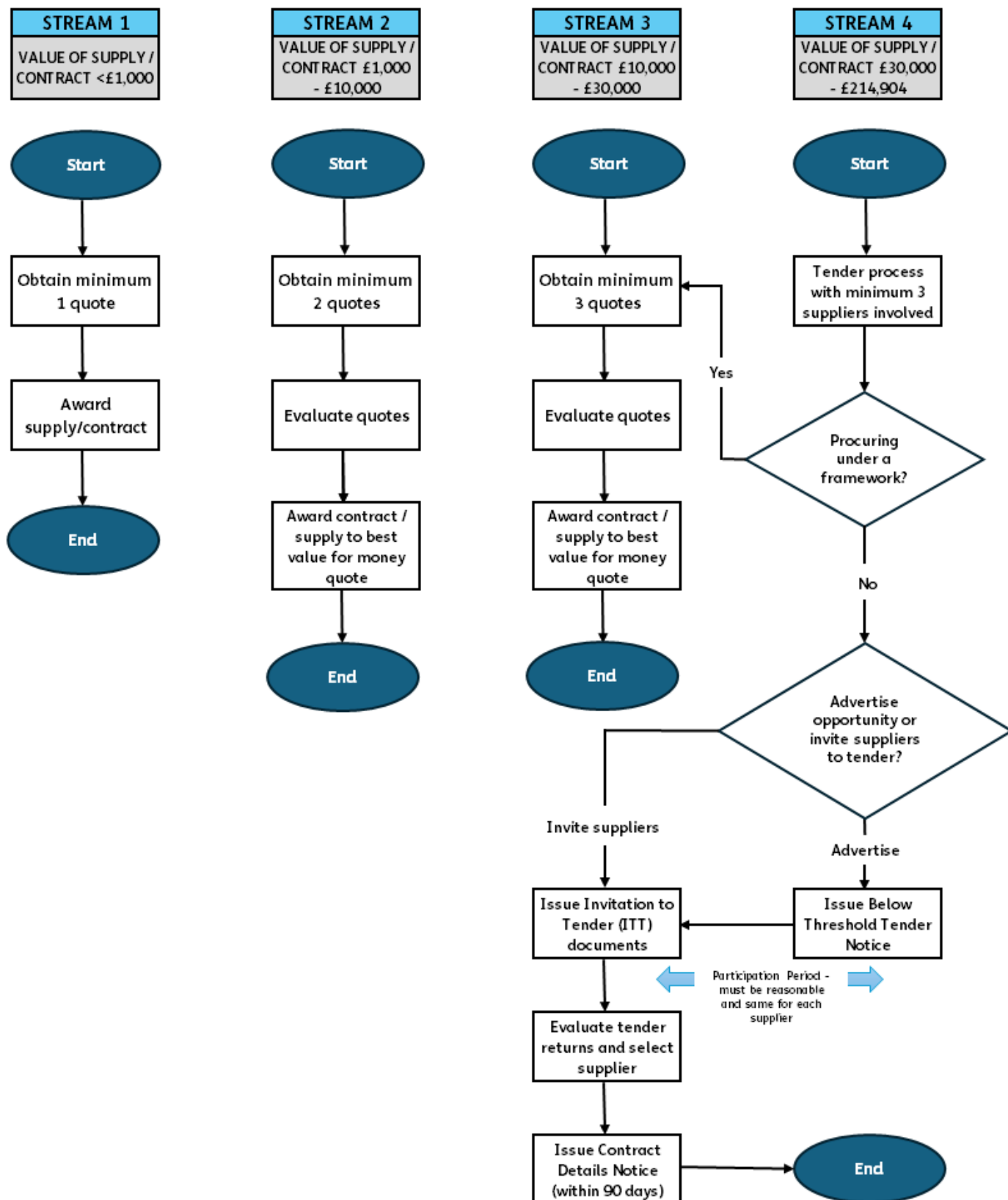


PROCUREMENT POLICY

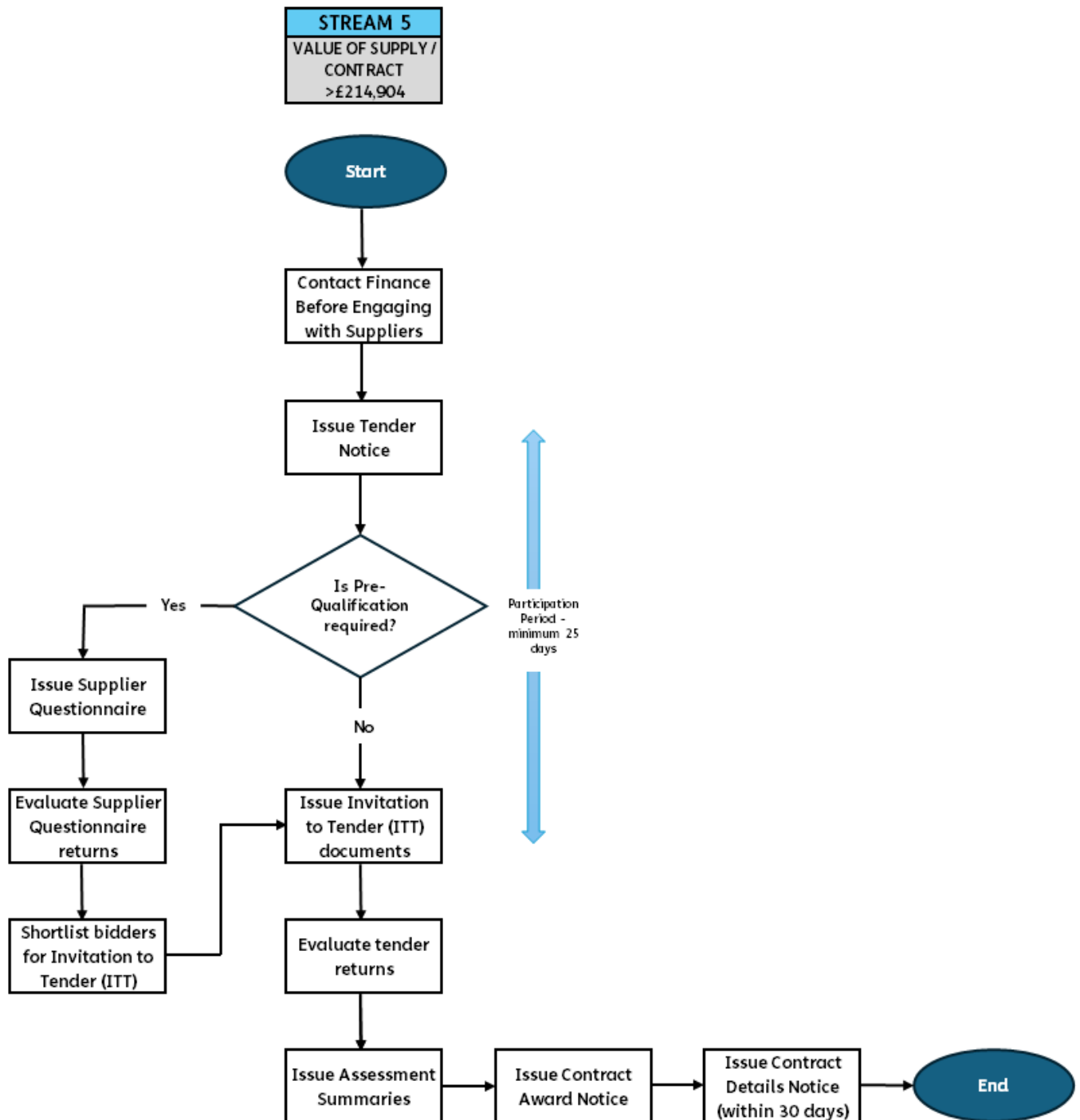
**Effective from
December 2025**

KEY POINTS FROM THIS POLICY		
Procurement Thresholds	The type of procurement process to follow is determined by the expected VAT inclusive value of the supply/contract. The thresholds are set out in this Policy.	See Flowcharts (pages 2-3) Section 2
Framework Agreements	Framework agreements may be used if appropriate. Any proposed use of framework agreements requires the approval of the Executive Team.	See Section 3
Tendering	Tendering is required when the estimated supply/contract is expected to be over £30,000 (including VAT). For values below £30,000, the minimum number of quotes required is set out in Section 2.5 and the flowcharts on pages 2-3.	See Section 4 Appendix 2
Waiver from Tendering/Quotes	A waiver from obtaining quotes/running a tender may be possible in exceptional circumstances.	See Section 5
Sustainability and Social Value	Consider more than price when buying goods or services, e.g. think about whether suppliers have a positive approach to environmental protection, whether they serve and give back to the local community, whether they operate ethically.	See Section 6
Safeguarding	All suppliers that might come into contact with customers/residents must agree to comply by the Safeguarding Guidelines for Contractors.	See Section 7
Purchase of IT Equipment and Software/Systems	- All purchases of IT equipment must be made by the IT Dept. - Any proposed purchase of new software/systems must be notified to the Head of IT <u>before</u> starting tendering or obtaining quotes.	See Section 8
Conflicts of Interest	Any conflicts of interest from staff engaging in procurement activities must be declared.	See Section 9
Contracts	- Must be signed in accordance with Financial Scheme of Delegation. Contract Register Form must be completed and submitted.	See Section 10
New Supplier Set Up	The two New Supplier Forms (one internal, one for the supplier) must be fully completed and sent to Finance.	See Section 11
Purchase Orders	An approved Purchase Order <u>must</u> be in place before expenditure is committed to with a supplier.	See Section 12
Payment Terms	The Charity's standard payment terms are 30 days.	See Section 13
Fast Payments	Most payments should be made through the weekly payment run. In exceptional circumstances, payments may be made by fast payment.	See Section 14
Escalation Process	Any concerns or questions around procurement activities should be escalated to the individuals listed or under the Charity's Whistleblowing Policy .	See Section 15
Please contact Finance if you have any queries in relation to this Policy Purchase.LedgerLSW@ymcaspg.org		

PROCUREMENT FLOWCHART (SPEND UP TO £214,904)



PROCUREMENT FLOWCHART (SPEND ABOVE £214,904)



1. Introduction and Scope

- 1.1.** This Policy sets out the principles that YMCA St Paul's Group ("the Charity") is committed to when undertaking procurement activities, with the specific aims of ensuring:
- Value for money for the Charity, our customers and our service users.
 - Compliance with relevant legislation, including the Procurement Act 2023.
 - Transparency and fairness to prevent fraud and bias in our procurements.
 - Proportionality – procurement processes are appropriate to the scale, scope and risk of what is being procured.
 - Fairness and equality in the selection of suppliers.
 - That the Charity's employees are clear on their responsibilities when undertaking procurement activity.
- 1.2.** This Policy applies to all employees of the Charity and relates to all procurement activities undertaken by the Charity, including purchases of goods, services and property capital works, regardless of funding source. There are no exemptions unless specifically referred to in this Policy. The Policy does not cover contracts of employment where staff are employed and directly paid by the Charity. The Policy applies to all subsidiaries in the Group.
- 1.3.** Any infringements of this Policy may be considered a breach of the Charity's Financial Regulations and could result in disciplinary action.
- 1.4.** All values referenced in this Policy include VAT where applicable.
- 1.5.** In line with the Charity's values, sustainability, environmental impact, and social value should be considered in procurement decisions where relevant and proportionate to the contract value.
- 1.6. Definitions** - Appendix 1 defines some of the key terms that are used throughout this Policy.

2. Procurement Thresholds

- 2.1.** This section outlines the procurement requirements that must be followed depending on the expected value of the supply/contract. **Please refer to the flowcharts on pages 3 and 4 for an illustration of the requirements to follow.**
- 2.2.** The type of procurement process required when engaging a supplier to provide goods, services or property capital works will depend on the financial value of the supply/contract. The value of the supply/contract should be the VAT inclusive amount that will be paid to the supplier. For a contract, the value should be the total amount payable, including VAT, over the duration of the contract.
- 2.3.** Under the requirements of the Procurement Act 2023 (PA23) there are financial thresholds in place, above which specific processes must be adhered to. If you expect that the goods, services or property capital works that you intend to procure will be above these thresholds, you **must** notify Finance before you engage in any direct procurement activity with suppliers. Please contact the Group Financial Controller or the Group Finance Director. The current financial thresholds under the PA23 are as follows:

Type of Activity	PA23 Financial Threshold*	Requirement
Goods and Services	£214,904 and above	You must Consult with Finance before engaging in any direct procurement activity with suppliers.
Property Capital Works	£5,372,609 and above	

*Inclusive of VAT

- 2.4. Programmes of work cannot be broken down into individual projects for the purpose of circumventing the PA23 financial thresholds.
- 2.5. Procuring goods, services or property capital works that are valued below the PA23 financial thresholds will either require the obtaining of written quotes or a tender process, depending on the value of the supply/contract being procured. The table below details the requirements:

Type of Activity	Value of Supply / Contract ¹	Flowchart Stream ²	Procurement Requirement
Goods and Services	<£1,000	1	Minimum 1 quote obtained.
	£1,000 - £10,000	2	Minimum 2 quotes obtained.
	£10,000 - £30,000	3	Minimum 3 quotes obtained.
	£30,000 - £214,904	4	'Notifiable Below Threshold Contract' Tender process with minimum 3 suppliers invited to tender. ³
	£214,904 and above	5	'Above Threshold Contract' Contact Finance before engaging with suppliers.
Property Capital Works	<£1,000	1	Minimum 1 quote obtained.
	£1,000 - £10,000	2	Minimum 2 quotes obtained.
	£10,000 - £30,000	3	Minimum 3 quotes obtained.
	£30,000 - £5,372,609	4	'Notifiable Below Threshold Contract' Tender process with minimum 3 suppliers invited to tender. ³
	£5,372,609 and above	5	'Above Threshold Contract' Contact Finance before engaging with suppliers.

¹The value should include VAT. For contracts the value should be the total amount payable over the contract duration.

²Refer to flowcharts on pages 2-3.

³Unless procuring under a framework agreement, in which case a minimum of 3 quotes must be obtained.

- 2.6. Quotes must be obtained in writing from suppliers and **uploaded to Compleat (purchasing system) when raising the Purchase Order for the work**, so the approver can evidence that the required number of quotes has been obtained.
- 2.7. Section 5 outlines what should be done in the event that the procurement requirements shown above cannot be met.
- 2.8. In addition to the above procurement requirements, any property capital works or other capital purchases above £2,000, e.g. gym equipment, also require Capital Panel approval before expenditure can be committed with a supplier.

3. Use of Framework Agreements

- 3.1. Where appropriate, the Charity may make use of established framework agreements to procure goods, services or property capital works. Framework agreements can offer significant benefits, including improved value for money, reduced procurement timescales, and access to pre-vetted suppliers.

3.2. Framework agreements may be used in the following circumstances:

- Where they have been established in compliance with the PA23.
- Where the framework offers suitable terms and conditions for the required procurement.
- Where the framework provides access to enough capable suppliers to ensure competition and value for money.

3.3. Where the framework permits more than one supplier for a category, a mini competition may be required. Staff must refer to the framework documentation to determine the appropriate call-off method – please contact the Group Financial Controller if any guidance is required.

3.4. Any proposal to enter into a new framework agreement, or to enter into an award under an existing framework agreement, must be presented to and receive the approval of the Executive Team.

4. Tendering

4.1. The Charity will use tendering procedures in the following circumstances:

- When the estimated supply/contract value exceeds the tender threshold (£30k) outlined in Section 2.4.
- When no suitable framework agreement is available.
- When a competitive process is needed to demonstrate transparency, fairness and value for money.

4.2. When undertaking a tender, the relevant department will:

- Prepare a clear specification of requirements.
- Publish appropriate contract notices where required (please consult with Finance).
- Treat all potential suppliers equally and without discrimination.
- Evaluate bids in accordance with pre-determined criteria. Refer to Appendix 2 for some guidance.
- Maintain appropriate records of the tendering process.
- Ensure all contracts are properly documented and stored (see Section 10).

4.3. The relevant department, in consultation with Finance, is responsible for managing the tender process. Tender evaluation panels must include individuals who are free from any conflicts of interest (see Section 9).

5. Waiver from Running a Tender or Obtaining Quotes

5.1. In exceptional circumstances it may not be appropriate or possible to undertake a tendering process or to obtain quotes as required by Section 2 of this Policy. For example, the Charity may be unable to identify a suitable number of suppliers to take part in a tender or quote process.

5.2. Under such circumstances, a request to waive the requirement to undertake a tender or obtain the number of quotes required by this Policy may be made. The [Procurement Waiver Form](#) must be completed for this purpose. The form requires approval by the Executive Team member for

the department making the request and by Finance (Group Financial Controller or Group Finance Director). The Waiver Form must be fully approved **before** any purchases are made that are not in compliance with this Policy.

- 5.3. All completed Waiver Forms will be retained by Finance for audit purposes.
- 5.4. In the event that emergency repairs are required at a site in a timeframe that doesn't allow for compliance with the Policy and completion of the Procurement Waiver Form, approval must be obtained from the Head of Property or, in their absence, the Director of Property & Places prior to procuring services. The Procurement Waiver Form should then be retrospectively completed to evidence approval.

6. Sustainability and Social Value

- 6.1. The Charity is committed to ensuring that all procurement activity delivers not only value for money but also positive social, economic and environmental outcomes.
- 6.2. Where relevant and proportionate, procurement decisions should consider:
 - 1. **Sustainability** – the environmental impact of goods, services and works, including resource efficiency, waste reduction, energy use and carbon emissions. The Charity will give preference to suppliers who can demonstrate sustainable sourcing, responsible manufacturing and compliance with all applicable environmental legislation and standards.
 - 2. **Social Value** – the wider community benefits that may be delivered through the contract, such as supporting local economic growth, creating employment and training opportunities, fostering equality, diversity and inclusion, and contributing to local community initiatives.
 - 3. **Ethical Sourcing** – adherence to fair trade principles, modern slavery prevention and responsible supply chain management.
- 6.3. Where possible, procurement exercises should seek to incorporate measurable sustainability and social value outcomes into tender specifications, evaluation criteria and contract management processes. Commitments that suppliers make in these areas should be monitored as part of contract delivery.

7. Safeguarding

- 7.1. By safeguarding, in general we mean protecting people's health, wellbeing and human rights, and enabling them to live free from harm, abuse and neglect. We require all our suppliers and their supply chains to comply with our [Safeguarding Policy](#) and [Safeguarding Procedures](#).
- 7.2. All suppliers providing a product or service where the supplier might come into contact with our customers (including residents, many of whom are vulnerable adults, children and young people) must, as a minimum, be provided with, and agree to adhere to, the Safeguarding Guidelines for Contractors (Appendix 2 in the [Safeguarding Procedures](#)).
- 7.3. If running a tender process where the supplier might come into contact with our customers/residents, the Safeguarding Guidelines for Contractors should be included in the pre-qualification stage of the tender process, to ensure that all suppliers tendering confirm their agreement that they will comply with the Guidelines.

8. Purchase of IT Equipment and Software/Systems

- 8.1. **All** purchases of IT equipment must be made by the IT Department – other departments must not purchase IT equipment directly. This is to ensure that only compatible/suitable equipment is purchased and that value for money is obtained.
- 8.2. Any proposed purchases of new IT software/systems **must** be notified to the Head of IT and the Group Financial Controller before any tendering or quote process is commenced. This is to ensure that IT can assess the requirements prior to starting procurement and for Finance to confirm that funding is in place. As part of any procurement of new IT software/systems, there is an ICT Technical Pre-requisite form that must be completed as part of the tender process (please speak to the Head of IT).
- 8.3. If the new software/system will handle personal data of employees, residents or others, the controls around how this data will be controlled/secured must be assessed by IT and the Charity's Data Protection Officer. Please consult with the Head of IT.

9. Conflicts of Interest (COI) and Supplier Approaches

- 9.1. All staff members and Trustees involved in tenders **must** complete the [Procurement Conflict of Interest Declaration Form](#) before commencing tender activities. It is the responsibility of the Project Lead for the tender to ensure that all tender participants, including themselves, have completed the COI Declaration form and that any potential conflict issues have been reviewed in consultation with the Group Financial Controller or the Group Finance Director.
- 9.2. Examples of possible conflicts of interest could include:
 - Friends or family members working for or having an interest in a bidder/incumbent supplier.
 - Receipt of undeclared gifts or hospitality from a bidder/incumbent supplier.
 - Use of a supplier for personal use which has been undeclared.
 - Any kind of payment (financial, services or goods) has been given or is expected between yourself or a bidder/incumbent supplier which has not been declared.
- 9.3. Failure to declare a COI could result in a tender outcome being challenged if a bidder believes we have not undertaken a fair and transparent process. A declared COI is not a negative, it just means you may have to withdraw from the tender process.
- 9.4. Staff members involved in selecting suppliers for the obtaining of quotes must also complete the Procurement Conflict of Interest Declaration Form if they have any potential COIs with the possible suppliers.
- 9.5. Staff involved in the selection of suppliers should be wary of any actions that might result in a specific supplier gaining an unfair advantage. Please refer to the [Anti-Fraud, Bribery and Corruption Policy](#). For example:
 - Suppliers might try to sway staff by offering gifts, hospitality, or promises of future opportunities. Any such approaches must be refused and then declared on the COI Form.
 - Deliberately or inadvertently sharing sensitive or insider information (e.g. budget limits, evaluation criteria) that could benefit a specific supplier.
 - Informal conversations may create unconscious bias towards a particular supplier.

10. Contracts

- 10.1.** All contracts must be signed in accordance with the expenditure limits specified in the Charity's Financial Scheme of Delegation (refer to the [Financial Regulations](#)).
- 10.2.** Once signed, the [Contract Register Form](#) must be completed and submitted to ensure the contract is added to the Contract Register.
- 10.3.** Contracts above £10,000 must have a named contract manager who is responsible for:
- Monitoring supplier performance and deliverables under the contract.
 - Managing risks that may exist under the contract.
 - Reviewing compliance with contractual terms.
 - Keeping adequate documentation for audit purposes.
 - Ensuring that any requirements around contract expiry are considered well in advance of any actions required e.g. the need to re-tender for services.
- 10.4.** Note that for contracts that fall above the PA23 financial thresholds outlined in Section 2.2. there are specific monitoring requirements. Finance will advise should this situation arise.
- 10.5.** Any variations to existing contracts (in relation to scope, term or value) must, if resulting in an increase in contract value or an extension in contract term beyond what was originally authorised, be approved within the Charity's delegated financial authority levels and in accordance with internal policies and procedures.

11. New Supplier Set Up

- 11.1.** If engaging with a new supplier, the following forms must be completed:
- a) [New Supplier Internal Form](#) – must be completed internally by the individual raising the new supplier request. Instructions are provided on the form – all sections in green must be completed. The form requires approval by the Head of Department and/or the relevant Executive Team member, if agreed that they will sign off suppliers with expected spend above a certain level.
 - b) [New Supplier Detail Form](#) – must be completed by the proposed new supplier.
- 11.2.** Once completed, both forms must be sent to Finance (Purchase.LedgerLSW@ymcaspg.org), together with the proof of bank details provided by the supplier. Finance will then perform further checks before authorising or rejecting the new supplier request. If approved, the supplier will be set up on the finance systems (Compleat and SAP).
- 11.3.** Suppliers based overseas, where payments will be made to a non-UK bank account, will not be set up on the finance systems but the new supplier forms must still be completed.
- 11.4.** The only exception to completing the new supplier forms is if the payment to be made to the supplier is a genuine one-off payment (i.e. we do not expect to use the supplier again). In this situation the invoice must be paid by Fast Payment (see Section 14), although Finance reserve the right to request supplier details if deemed necessary.

12. Placing Orders

- 12.1.** The Charity uses purchase orders (POs) raised in Compleat to commit to expenditure with suppliers. **An approved PO must be in place before expenditure is committed to with a supplier for all purchases.**
- 12.2.** If the exact amount of the purchase is not known at the time of raising the PO, a best estimate should be used, reflecting the potential highest cost, to avoid having to raise a new PO. It is not acceptable to delay raising the PO until after the goods/services have been delivered and the exact cost is known.
- 12.3.** If several invoices are likely to be issued by the supplier for the work/service delivered, e.g. against a contract, a blanket PO should be raised, against which each invoice can be receipted. For example, if a contract for £100k is expected to be invoiced in 4 tranches, a PO for £100k should be raised and each £25k invoice should then be receipted against the original PO.
- 12.4.** POs should be raised in Compleat. Once raised, the PO will pass through the relevant approval chain, ensuring that the PO has been approved in accordance with the Charity's Financial Delegation of Authority limits.
- 12.5.** It is not possible in Compleat for the same person to raise and approve a PO.
- 12.6.** Once fully approved, the PO, or the PO number, should be communicated to the supplier. The supplier must then include the PO number on the face of their invoice(s) and email the invoice to ymcastpaulsgroup@compleat-invoicing.com. Any supplier invoices received without a PO number will be sent back to the supplier.
- 12.7.** All POs must be promptly receipted in Compleat as soon as the goods or services have been delivered to our satisfaction. Failure to receipt the PO will delay supplier payments and could impact operationally if supplier accounts are put on hold. Receipted POs will be automatically matched against the invoice sent by the supplier (assuming they have quoted the PO) and paid in accordance with the payment terms for that supplier (see Section 13).
- 12.8.** Guidance and training for making purchases on Compleat can be found on the [Intranet](#).
- 12.9.** The only exceptions for raising POs are:
- Where payments are made to suppliers by direct debit or standing order (typically used for utility payments or regular fixed payments, e.g. street property rents). Any requests for new direct debits or standing orders must be made to Finance (Purchase.LedgerLSW@ymcaspg.org) and require the approval of the Group Finance Director. Finance will manage the setting up of the new payments.
 - Where, as per Section 11.4, the supplier is only going to be used for a one-time transaction and is not therefore being set up as a new supplier. However, pre-approval (by email) for the supply must still be obtained in accordance with the Charity's delegated financial authority levels.
 - If payment is being made to an overseas bank account. The Charity's weekly payment runs can only be made to UK bank accounts. Payments to overseas bank accounts must therefore be made by fast payment (see Section 14). However, even though a PO is not required for an overseas payment, prior approval (in the form of an email) in accordance with the Charity's Financial Delegation of Authority must be obtained for an expenditure

commitment made to an overseas supplier. This approval must be included with the fast payment request submitted to Finance.

13. Payment Terms

- 13.1. The Charity's standard payment terms are 30 days from invoice date.
- 13.2. If a supplier has standard payment terms that are higher than 30 days, we will adopt their standard term.
- 13.3. If a supplier refuses to accept the standard 30 days payment term this should be discussed with Finance.

14. Fast Payments

- 14.1. The Charity operates a weekly payment run and this should be the standard form of payment for all suppliers.
- 14.2. In exceptional circumstances, a fast payment can be requested. Fast payments are time consuming for Finance to process and have an associated bank charge, so should be kept to a minimum. It is envisaged that fast payments should only be used in the following circumstances:
 - a) Where payment is being made to an overseas bank account (these types of payments cannot be processed through the weekly payment run).
 - b) Where the payment being made to the supplier is a genuine one-off payment (i.e. we do not expect to use the supplier again) and is below £5k in value (see Section 11.4).
 - c) There is a necessity to pay the supplier urgently. For example, to avoid late payment charges, the threat of bailiff action. Finance will assess the validity of urgent requests and ask for payments to be processed through the normal payment run if the request does not appear necessary.
- 14.3. To make a fast payment request, the Fast Payment Form must be completed and submitted to Finance (Purchase.LedgerLSW@ymcaspg.org). The Form must be authorised in accordance with the Charity's Financial Delegation of Authority.

15. Escalation Process

- 15.1. All colleagues are responsible for upholding the Procurement Policy. As such, colleagues can escalate any perceived concerns or questions with the Group Finance Director, the Group Financial Controller or the Head of Governance & Assurance. Alternatively, should colleagues wish to retain anonymity, any concerns can be raised through our reporting process set out in the [Whistleblowing Policy](#).

APPENDIX 1 – DEFINITIONS

DEFINITIONS	
Above-Threshold Contract	A contract whose estimated value is above the statutory financial thresholds set out in the Procurement Act 2023 (£214,904 for supplies and services or £5,372,609 for capital works contracts).
Assessment Summaries	A document that outlines the bidder's ranking, their score and the score of the successful bidder. Suppliers must be provided with the score for each award criterion (e.g. price).
Below-Threshold Contract	A contract whose estimated value falls below the statutory financial thresholds set out in the Procurement Act 2023 (£214,904 for supplies and services or £5,372,609 for capital works contracts).
Below-Threshold Tender Notice	Required if we wish to advertise a below-threshold contract above £30k in value (not mandatory – can choose to select suppliers to invite to tender). Slimmed down version of the Tender Notice and needs to be published on the Central Digital Platform.
Call-Off Contract	A contract made under a framework agreement for specific goods or services required at a particular time.
Central Digital Platform	The government's official online system for public procurement, a single point of access for publishing procurement notices required under the Procurement Act 2023.
Conflict of Interest	Any situation where personal, financial, or other considerations may compromise or appear to compromise impartial decision-making in the procurement process.
Contract	A legally binding agreement between the procuring entity and a supplier, outlining obligations, deliverables, timelines, and payment terms.
Contract Award Notice	Required to be published on the Central Digital Platform prior to a contract being entered into – only needed for above-threshold contracts.
Contract Details Notice	Required to be published on the Central Digital Platform for both above-threshold and notifiable below-threshold contracts. This Notice informs suppliers and the general public that a contract has been entered into and provides important information relating to the contract. Must be published within 90 days of contract signing.
Contract Management	The ongoing process of monitoring and managing contracts to ensure compliance with agreed terms, performance standards, and service delivery.
Due Diligence	The process of evaluating a potential supplier's financial, legal, and operational status before entering a contract.
Evaluation Criteria	Pre-determined factors used to assess and compare bids or quotations, which may include price, quality, sustainability, and delivery capability.
Financial Regulations	The internal financial regulations of YMCA St Paul's Group. Includes the Charity's Delegated Financial Authority Levels, which show the financial approval levels of staff at different levels.

APPENDIX 1 – DEFINITIONS (continued)

DEFINITIONS	
Framework Agreement	A pre-arranged agreement with one or more suppliers that sets out the terms under which specific purchases (call-offs) can be made over a defined period.
Invitation to Tender (ITT)	A formal document we would issue to invite suppliers to submit tenders for the provision of goods, services or capital works. Should set out the scope of the work, tender submission requirements, evaluation criteria and terms and conditions.
Participation Period	The time between issuing the Tender Notice (or Below Threshold Tender Notice) and the tender documents. For Above Threshold contracts, this period must be a minimum of 25 days. For Below-Threshold contracts the period must be “reasonable, and the same for each supplier” – best practice is 7-10 days.
Pre-Qualification	A preliminary step that might be used in a procurement process to screen interested suppliers against a set of criteria to determine which suppliers will be invited to submit a full tender.
Procurement	The process of acquiring goods, services, or works from external sources, covering all activities from identifying needs, specifying requirements, and sourcing, to contracting and contract management.
Procurement Act 2023	UK legislation that governs public procurement processes, replacing previous EU-based rules. It establishes principles of transparency, value for money, and fair treatment of suppliers, and introduces new procedures for contract award, publication, and compliance. The Act provides the legal framework within which all public procurement activities must be conducted.
Purchase Order (PO)	A formal document issued by the buyer to authorise a purchase and commit to payment for specified good or services.
Quotation (Quote)	A written offer from a supplier stating the price and terms for specific goods or services. Typically used for low-value or routine procurements.
Standstill Period	This period begins once we have published a Contract Award Notice. It lasts 8 working days, during which time we must not enter into the contract. It gives the opportunity for the suppliers not awarded the contract to challenge the outcome. If a challenge is raised, the contract cannot be finalised until the challenge is withdrawn or resolved.
Supplier / Vendor	An individual or organisation, external to YMCA SPG, that provides goods, services, or works under a contractual agreement.
Supplier Questionnaire	A questionnaire may be used during Pre-Qualification as a tool to exclude bidders who do not satisfy a minimum requirement (such requirements must be clearly defined).
Tender / Tendering	A formal and competitive procurement process inviting suppliers to submit bids for higher-value or complex contracts, in line with transparent and accountable procedures.
Tender Notice	Required to be published on the Central Digital Platform, this Notice alerts suppliers and contractors to the procurement opportunity, allowing them to express an interest that might progress to an Invitation to Tender.

APPENDIX 1 – DEFINITIONS (continued)

DEFINITIONS	
Tendering Period	Similar to the Participation Period, the Tendering Period is the time between issuing the tender documents and the deadline for tender submissions. Must be a minimum of 25 days for Above-Threshold contracts. For Below-Threshold contracts, the period must be “reasonable, and the same for each supplier” – best practice is 7-10 days.
Thresholds	Defined monetary values that determine the appropriate procurement method (e.g., use of quotes, tenders, or direct awards).
Value for Money (VfM)	Achieving the best possible outcome for the organisation through an optimal balance of cost, quality, and performance.

APPENDIX 2 – TENDER EVALUATION GUIDANCE

Here are some of the potential areas you may wish to include in a tender evaluation:

1. Price and Value for Money

- Total cost (compare the full price including VAT, delivery, installation, maintenance etc.).
- Clear cost breakdown.
- Value for money – assess not just lowest price but best balance of cost, quality, risk.
- Whole life cost – consider ongoing costs.

2. Quality and Technical Merit

- Compliance with specification – does the proposal meet our tender requirements?
- Technical capability – are the methods, materials or proposed systems appropriate and proven?
- Innovation – does the supplier offer creative or efficient solutions that add value?
- Service quality – check proposed service levels, response times and quality control.

3. Experience and Track Record

- Relevant experience – evidence of past work of a similar size and scope?
- References – feedback from previous clients.

4. Capability and Capacity

- Staffing and skills – qualifications and experience of key personnel.
- Resources and equipment – access to suitable infrastructure or subcontractors.
- Delivery plan – realistic timescales and understanding of project requirements.
- Business continuity – ability to deliver even in case of staff absences or supply disruptions.

5. Social Value and Ethical Considerations

- Social value – does the supplier operate in our community and make any contribution to them, e.g. local employment, apprenticeships, support for charities etc.
- Environmental sustainability – does the supplier have a sustainable outlook, e.g. policies on carbon reduction, waste and responsible sourcing.
- EDI – demonstrated commitment and practical actions.
- Ethical standards – compliance with our safeguarding and anti-bribery policies.

6. Compliance and Risk Management

- Insurance – adequate public, employer's and professional indemnity coverage.
- Health and safety – up-to-date policies, risk assessments and training evidence.
- Data protection – GDPR compliance and information security controls.
- Financial stability – accounts or credit checks to ensure viability.

7. Added Value and Partnership Approach

- Collaboration – willingness to engage, adapt and communicate effectively.
- Aftercare/support – maintenance/warranty/ongoing support provisions.
- Continuous improvement – commitment to feedback and performance review process.