**Appendix 1 – Specification**

# **Scope of Contract**

The scope of the Contract is the provision of procurement administration, advice and support.

Tendering administration and advice will include key activities such as :-

1. Tender production support
2. Posting of tender on Delta (or similar) portal
3. Administering tenders whilst live addressing bidder queries and communications in line with good practice.
4. Assessing pass/fail elements of submissions
5. Raising awareness of any anomalies noted
6. Co-ordination of quality assessment submissions and interviews
7. Chairing of interviews or site based assessment activities
8. Final complete submission reviews including written report identifying key tender findings and preferred bidder outcome.
9. To liaise with preferred bidders on award
10. To attend where necessary first mobilisation meetings

Tendering and procurement support (retainer estimated at 12 days per annum) will include key activities such as :-

1. To provide periodic industry updates including annual written briefing note to be used to brief the Executive and Group Board.
2. To provide timely updates on any changes in legislation impacting procurement activities.
3. To provide face to face training on procurement legislation, best practice and associations procurement policies once per annum for approximately 70 staff on an annual basis. (split in to at least 3 sessions)
4. To periodically review the associations policies and procedures in relation to procurement to ensure legislative compliance and best practice.

We have conducted analysis of our procurement requirements over the next 2 years in order to give some visibility of the level of work we have in the immediate future. This list is not exhaustive and should be used as a guidance only and not a guarantee of levels of demand.

In doing this we have categorised the demand in the 3 broad categories in an attempt to provide a frame work for submissions. The categorisation descriptors are not exhaustive and differing projects will need differing levels of support.

**Category One - Complexity - Low**

Typically a tender that will be below procurement thresholds as set out in the Public Contracts Regulations. They will require support to be in the region of 0-8 days, with desktop assessments of bidders, no site visits or interviews needed.

Requirements will include :-

1. Tender production support including document collation.
2. Posting of tender on Delta (or similar) portal
3. Administering tenders whilst live addressing bidder queries
4. Assessing pass/fail elements of submissions
5. Raising awareness of any anomalies noted
6. Co-ordination of quality assessment submissions and scoring
7. Final complete submission reviews including written report identifying key tender findings and preferred bidder outcome.
8. To liaise with preferred bidders on award

**Category Two - Complexity - Medium**

Typically a tender that will be below procurement thresholds as set out in the Public Contracts Regulations. They will require support to be in the region of 8-10 days, with desktop assessments, co-ordination and chairing of onsite interviews of bidders.

Requirements will include :-

1. Tender production support
2. Posting of tender on Delta (or similar) portal
3. Administering tenders whilst live addressing bidder queries
4. Assessing pass/fail elements of submissions
5. Raising awareness of any anomalies noted
6. Co-ordination of quality assessment submissions and interviews
7. Chairing of interviews or site based assessment activities
8. Final complete submission reviews including written report identifying key tender findings and preferred bidder outcome.
9. To liaise with preferred bidders on award

**Category Three - Complexity - High**

Typically a tender that will be above procurement thresholds as set out in the Public Contracts Regulations. They will require support to be in the region of 10+ days, with desktop assessments, co-ordination and chairing of onsite interviews of bidders, site visits to validate submissions and attendance at mobilisation meetings.

Requirements will include :-

1. Tender production support
2. Co-ordination of pre tender scoping meetings / visits.
3. Posting of tender on Delta (or similar) portal
4. Administering tenders whilst live addressing bidder queries
5. Assessing pass/fail elements of submissions
6. Raising awareness of any anomalies noted
7. Co-ordination of quality assessment submissions and interviews
8. Chairing of interviews or site based assessment activities
9. Final complete submission reviews including written report identifying key tender findings and preferred bidder outcome.
10. To liaise with preferred bidders on award
11. To attend where necessary first mobilisation meetings
12. **General Requirements**

The Service Provider shall:

* Provide the Services in accordance with the Specification
* Provide the Services with a high degree of professional skill, sound practices and good judgement normally exercised by recognised professional firms or by highly skilled and experienced service providers providing services of a similar nature to the Services
* Provide the Services to the satisfaction of Pioneer (acting reasonably)
* Include all mileage costs and subsistence costs within the submitted rates
* Include all costs for the production of any documentation and the attendance of any meetings required by Pioneer under the Contract within the submitted rates
* Ensure all individuals working under this Contract are competent, having the necessary training, qualifications, knowledge, skills and experience

**Applicable Legislation and Industry Standards**

The Service Provider shall comply with the requirements of the following specific legislation, in conjunction with delivery of the Services and in carrying out its obligations under the Contract:

* The Public Contracts Regulations 2015

And all subsequent amendments thereto in addition to any other relevant legislation.

**Real Living Wage**

The Service Provider shall ensure that all staff employed on the delivery and management of this Contract are paid as a minimum the Real Living Wage.

More details on the Real Living wage can be found [here](https://www.livingwage.org.uk/what-real-living-wage): <https://www.livingwage.org.uk/>

1. **Specific Requirements**
	1. **Summary Reports**

The following summary reports must be produced annually summarising the procurement activities of the association over the preceding 12 months, highlighting contracts, awards, levels of financial commitment and any other notable issues.

* 1. **General Advice**

Where requested by Pioneer, the Service Provider shall act as a professional partner and advisor to Pioneer in relation to procurement. In carrying out this duty, the Service Provider may be required to communicate on Pioneer’s behalf with any enforcing authority and provide general related advice on request.

* 1. **Expert Witness**

If asked to provide the services of an expert witness, the Service Provider shall identify and provide the CV of one or more competent (knowledge, experience, qualifications) named individual(s) for acceptance by Pioneer. The individual shall always exercise reasonable skill and care in relation to an appointment under this section of the Contract. The Service Provider shall agree procedures regarding legal privilege with Pioneer before issuing any documentation.

* 1. **Review Meetings**

The Service Provider shall attend bi annual review meetings to review performance over the previous period. The agenda for the meetings will include, but not be limited to, the following:

* Procurement activity
* Awarding criteria performance
* Performance of preferred bidders
* Review of upcoming activities
* Forecasting budget costs

**Indicative Procurement Activity**

Bidders - please refer to the indicative procurement activity planned for the next 24 months to aid the calculation of your submissions.