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## **ILLOGAN PARISH COUNCIL**

### **Quotation and Tenders Policy**

#### **Introduction**

The Council from time to time needs to obtain quotes and tenders 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 tender. All issue and acceptance of tenders and quotes shall be subject to the overriding principle of "Best Value".

This policy will complement the Council's Standing Orders and Financial Regulations.

#### **Purpose**

The purpose of this policy is to ensure that:

- The Council procures supplies, services and works that meet the defined and agreed essential needs of the Council as specified in the quotation or tender documents;
- In all cases, a specification is produced and agreed prior to the quotation or tender documents being issued that clearly identifies the essential requirements (needs), along with the highly desirable (discretionary added value) and desirable (wants);
- The selection criteria are clearly identified;
- The tender or quote is selected which offers the best value to the Council over the whole life of the project;
- The tendering process, selection of bidders and the award of contracts are fair, open and objective;
- All tenders and quotes are evaluated to a consistently high standard;
- Equality, diversity and sustainability consideration are embedded in the Councils tendering and quotation processes;

## Quotations

The formal quotation 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. For goods or services estimated to exceed £100 a quotation pack will be compiled which will consist of a minimum of a job specification, health and safety requirements, a copy of the Council's Management of Contractors Policy and any other appropriate policies, timescales and all appropriate deadlines, details of when, how and where to return the quote. Any quotations that are not received in the specified format will be excluded and not considered by the Council.
- iii. A public notice for quotes estimated to exceed £100 will be placed on the Council's notice boards, website and Facebook page and if appropriate in the Illogan Review;
- iv. Once received the quotes will be assessed by the Full Council or relevant Committee;
- v. 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 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, a copy of the Council's Management of Contractors Policy 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. Any quotations received in an unmarked envelope will be excluded and not considered by the Council. A public notice of the tender will be placed on the Council's notice boards and website and if appropriate in the Illogan Review;
- iii. Tenders submitted are to be opened by two Councillors and the Clerk after the stated closing date and time. The Councillors 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 two Councillors on a rota basis.

- iv. Once opened the tenders will be assessed by the Full Council or relevant Committee;
- v. 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.

## **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. in the Western Morning News, 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.

## **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.

The Council will, as and when appropriate, place an article in the Illogan Review or other suitable publication to:

- Advertise any current invitations for quotations or tenders;
- Advertise any quotes or tenders anticipated in the next 6 months; and to
- 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 tenderers can 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.

## **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 pay all invoices by cheque, unless specifically negotiated by the contractor and agreed by the Council prior to the commencement of the contract/work. There is one cheque run per month on the 3<sup>rd</sup> Wednesday of each month except December when it will be the 2<sup>nd</sup> Wednesday and cheques are posted 1<sup>st</sup> class the day after the meeting i.e. the 3<sup>rd</sup> Thursday.

<b>Review Date</b>	<b>Reviewed By</b>	<b>Amendments</b>	<b>Minute Number</b>
10.07.19	Finance and Resources Committee	Payments section added	FR19/07/16.2