

## Appendix 2: Tender and Contract Lifecycle

STAGE	ACTIONS REQUIRED
PREPARATION	<ul style="list-style-type: none"> <li>• Business need identified</li> <li>• Feasibility study, Best Value Options Review and outcome options</li> <li>• Identify business benefits/efficiencies anticipated</li> <li>• Justify the requirement ie link to the Corporate Plan and strategic objectives of the service</li> <li>• Identify the required outcomes</li> <li>• Consultation with customers and clients where applicable</li> <li>• Consider market testing/analysis</li> </ul>
PLANNING	<ul style="list-style-type: none"> <li>• Format the project scope (including technical, operational, financial, legal etc) and identify the project owner</li> <li>• Seek input from all parties to consideration of all options for strategy development and timescales. (Input will be required from the Finance Department, Project Management (if applicable), the CPBD Service, the Strategic Design Alliance or equivalent and your own internal specialists)</li> <li>• Prepare a business case</li> <li>• Estimate the whole life costing and obtain the relevant initial budget approvals and payment mechanisms</li> <li>• Establish your evaluation team and/or project team (include business representatives, including users, technical specialist and commercial/procurement specialists)</li> <li>• Create a risk analysis and allocation</li> <li>• Establish a gateway/project review plan</li> <li>• Develop a specification of requirements in conjunction with business representatives, including users, technical specialists and commercial/procurement specialists. Consider an output based specification and value added elements that will allow flexibility in the solution chosen.</li> <li>• Develop an evaluation strategy and evaluation criteria</li> <li>• Obtain all relevant authorisation (financial, legal, etc) prior to commencement of any tender activities</li> <li>• Consider any requirement to place the project on the forward plan</li> </ul>
PRE QUALIFICATION	<ul style="list-style-type: none"> <li>• In conjunction with the CPBD Service and Evaluation/Project Team you must consider the following: <ul style="list-style-type: none"> <li>• Sustainability</li> <li>• Social Responsibility</li> <li>• Fair Trade</li> <li>• Community benefits</li> <li>• Environmental issues</li> <li>• Recycling/packaging requirements</li> <li>• Political importance/strategic fit</li> <li>• Performance measures required</li> <li>• Continual improvement and efficiencies</li> <li>• TUPE</li> </ul> </li> <li>• Issue of appropriate advertisements</li> <li>• Preparation and issue of formal documentation in conjunction with the CPBD Service for pre qualification of suppliers invited to tender/quote</li> </ul>

	<p>(where applicable). This will likely take the form of the Pre Qualification Questionnaire (PQQ).</p> <ul style="list-style-type: none"> <li>• Receipt and evaluation of pre qualification submissions from suppliers. This may include: <ul style="list-style-type: none"> <li>• Site Visits</li> <li>• Demonstrations</li> <li>• Reference Site Visits</li> <li>• Presentations</li> <li>• Clarification meetings</li> </ul> </li> </ul> <p>All of which must be formally documented.</p>
TENDER/QUOTATION INVITATIONS/RECEIPT	<ul style="list-style-type: none"> <li>• Preparation and issue of formal documentation in conjunction with the CPBD Service/Strategic Design Alliance or equivalent</li> <li>• Selection of appropriate tender/quotation process (in conjunction with the CPBD Service/Strategic Design Alliance or equivalent)</li> <li>• Formal management of supplier questions prior to tender/quotation return</li> <li>• Establish formal process for receipt of tenders/quotations</li> </ul>
SUPPLIER SELECTION/EVALUATION	<ul style="list-style-type: none"> <li>• Evaluation of tender/quotation submissions from suppliers. This may include further: <ul style="list-style-type: none"> <li>• Site Visits</li> <li>• Demonstrations</li> <li>• Reference Site Visits</li> <li>• Presentations</li> <li>• Clarification meetings</li> </ul> <p>All of which must be formally documented.</p> </li> <li>• Apply the pre determined evaluation criteria and strategy to all submission</li> <li>• Identify the preferred supplier(s) <ul style="list-style-type: none"> <li>• Obtain all relevant authorisation (financial, legal, etc) prior to award of contract</li> </ul> </li> </ul>
CONTRACT AWARD	<ul style="list-style-type: none"> <li>• Collate all documentation into contract documentation</li> <li>• Ensure all formal authorisations have been obtained</li> <li>• In conjunction with the CPBD Service/LCC/Strategic Design Alliance or equivalent arrange for contract award and formal closure.</li> </ul>
IMPLEMENTATION	<ul style="list-style-type: none"> <li>• Provide consultation with citizens, customers and clients</li> <li>• Implement any formal implementation plan in accordance with your project plan and the contract documentation</li> <li>• Ensure that formal testing and sign off is carried out in accordance with your project plan and the contract documentation</li> </ul>
ONGOING CONTRACT MANAGEMENT	<ul style="list-style-type: none"> <li>• Conduct formal performance management / service level agreements as defined in the contract and in accordance with any specific contract requirements (eg Construction)</li> <li>• Monitor spend against the contract in accordance with the contract terms and conditions, Contract's Procedure Rules and Financial</li> </ul>

	<p>Procedure Rules</p> <ul style="list-style-type: none"><li>• Ensure that the contract term is carefully monitored and that extensions, termination and re-tendering is initiated in a timely manner</li></ul>
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