



Epping Forest District Council

Procurement & Contracts Checklist

PLEASE NOTE: THIS CHECKLIST MUST BE USED FOR ALL SPEND OVER £25,000 OR ANY VALUE THAT WILL REQUIRE A CONTRACT TO BE PUT IN PLACE.

Procurement Exercise/Activity: _____

General Principles	
I have liaised with the Procurement and Contract Development Team before I begin to see what information they require to draw up a contract for this requirement if deemed necessary (this will include GDPR considerations).	
I have checked that the Procurement and Contract Development Team has sufficient resource available to support me through my procurement exercise and contract drafting. Any additional funds needed to pay for appropriate levels of support should be included in your budget for the project.	
I have ensured that I have sufficient budget in place to cover the anticipated value of the requirement and any additional support required from the Procurement and Contract Development Team – either through confirmation from your Service Accountant and/or Cabinet Approval for additional budget.	
If the project will impact another department within the Council in any way (Hardware / Software / Licenses from ICT for example) I have ensured that they have been consulted with prior to proceeding.	
I have carried out some form of market testing, appropriate to the scale and scope of the procurement, to assess that interest exists amongst potential suppliers and to assist in the development of the specification.	
I have determined a realistic estimate of the total life cycle value of the goods, services or works I am procuring.	
I have considered any safeguarding issues where relevant and put appropriate processes in place.	
I have made enquiries to establish whether another department already has a contract for the services I am seeking to procure.	
I have made enquiries to establish whether an opportunity exists for joint procurement with another department.	
I have investigated whether a framework agreement exists for the services I am seeking to procure.	
I have ensured that, for any direct awards without competition, I am able to demonstrate how I am achieving best value for the Council.	
I have liaised with Business Support Finance to ensure they have all the information they need to support me (new supplier on Marketplace and Accounts Payable system, for example).	

Spend over £25k in value

<p>I have liaised with the Procurement and Contract Development Team before I begin to see what information they require to draw up a contract for this requirement.</p>	
<p>I have considered utilising the Essex Procurement Hub to manage this tender on my behalf (speak to the Procurement and Contract Development Team for more information).</p>	
<p>I have created a clear description of what is needed (specification). Ensure all relevant equality issues have been considered, using the equality questionnaire if appropriate.</p>	
<p>I have provided a reasonable estimated value of the procurement exercise to the Procurement and Contract Development team to ensure that all appropriate actions are taken prior to issue.</p>	
<p>I have included in the documentation a clear description of the criteria that will be used for evaluating the tenders and the maximum scores to be awarded for each item. As well as setting an appropriate price/quality split, Social Value and Sustainability criteria must be included in EFDC's Procurement processes wherever possible. Please speak to the Procurement and Contract Development Team for further guidance.</p>	
<p>In preparing this opportunity I have considered the economic, environmental and social benefits of the procurement in the District. If the tender is for the provision of services and the estimated value is above the EU Threshold I have documented the outcome of the team's discussions on this matter.</p>	
<p>I have liaised with Procurement and Contract Development Team to publish the requirement via the Council's e-Procurement portal and have invited at least five potential suppliers or advertised on Contracts Finder (see Procurement Rules for full requirement based on value of procurement). Details of the suppliers to be invited must be provided to the Procurement and Contract Development Team prior to issue.</p>	
<p>Wherever possible, I have invited at least two local suppliers (with headquarters in the Epping Forest District) to bid for the requirement. If unable to do so, the Procurement and Contract Development Team have been informed of the reasons for this.</p>	
<p>Any clarification requested received during the tender process were responded to, with the response being issued to all tenderers for information (this can be done on your behalf as part of the Procurement process – speak to the Procurement and Contract Development Team).</p>	
<p>I have ensured that I and at least one colleague have separately scored the tenders using the scoring mechanism set out in the documentation previously issued.</p>	
<p>I have selected the supplier achieving the highest score from the combined evaluations.</p>	
<p>I have written to or emailed all the tenderers notifying them of the outcome (this can be done on your behalf as part of the Procurement process – speak to the Procurement and Contract Development Team).</p>	
<p>I have adhered to the requirements of EFDC's Procurement Rules and Financial Regulations.</p>	

DECLARATION

I confirm that the above checklist and all associated actions included have been undertaken as part of this procurement exercise.

Signed: _____ Date: _____

Job Title: _____

ONCE COMPLETE, PLEASE RETURN TO EFDC'S PROCUREMENT AND CONTRACT DEVELOPMENT TEAM