



VOLUNTARY ACTION  
MERTHYR TYDFIL  
GWEITHREDU GWIRFODDOL  
MERTHYR TUDFUL

## QUOTATIONS AND TENDERING POLICY

### 1 PROCEDURE

All orders for single items under £2,000 need three estimates. Orders for single items over £2,000 have to be put through the formal tendering process. Orders for stationery and consumables can be made after reviewing at least three supplier's catalogues. Expenditure for printing requirements will be totalled over one financial year to see if the figure exceeds £2,000.

All orders for supplies, services and other requirements over £50 must be dealt with via the Purchase Order System.

All invoices are processed for payments by the Administration and Finance Officer.

### 2 FORMAL TENDERING ARRANGEMENTS

All single orders in excess of £2000 must be the subject of competitive tendering. Tender documents must be sent to at least three applicants, in the approved manner.

### 3 RECEIPT OF TENDERS

- 3.1 Each tenderer will be provided with two envelopes for the return of tenders. All tenders must be addressed to the Tendering Officer (Officer responsible for the service within the tender) in a plain sealed envelope which shall bear the word 'tender' followed by the subject to which it relates but shall not bear any name or mark indicating the sender.
- 3.2 The completed form of tender shall be sealed in an inner envelope endorsed with the project title and the tenderer's name.
- 3.3 The outer envelope should be endorsed with the project title and the words 'tender – do not open before ..... hours on ..... the ..... day of the month of .....20.....
- 3.4 Implementation of the above 'two envelopes' system will ensure that it is not possible to identify the tendering contractor prior to the tender opening.

### 4 CUSTODY OF TENDERS

- 4.1 The tenders when received should have the time and date of receipt recorded on the outer envelope and shall be placed in a safe and locked cabinet until the time of opening.

- 4.2 Tenders received after the appointed day and hour should not be considered. The outer envelope of such tenders will be opened to identify the tenderer and the inner envelope will be returned unopened to the tenderer by return of post, stating the reason for disqualification.
- 4.3 At least one, but preferably two, members of the Board will be present. It will be acceptable, however, where small contracts, (£2000 to £5000) are concerned, for only one of the Board to be present along with the Tendering Officer.
- 4.4 The tenders must be scheduled as they are opened in a bound book kept especially for this purpose. Each entry will be headed by the name of the job, the date of the opening and the names of the persons witnessing the opening. Any alterations to entries in the tender register must be initialled by the members of the Board present and the Tendering Officer and if present any consultant.
- 4.5 The tenders, including any invited alternatives, will be scheduled under the following headings:
- Name of tenderer;
  - Tender figure;
  - Basis of tender (variation of price/firm price);
  - Contract period;
  - remarks.
- 4.6 Any necessary further comments should be added together with a direction as to the action required, eg 'lowest tender referred to originator for report' or 'only one tender received – go out to tender again'. The representative present must then sign the register.
- 4.7 It is imperative that all representatives present treat all information contained in tenders and the tender register as strictly confidential.

## **5 ACCEPTANCE OF TENDER**

- 5.1 The Tendering Officer shall have the authority to accept the lowest tender received, in line with the contract for service, provided that such sum is within the costs approved in advance by the appropriate committee included in the approved budget.
- 5.2 In all other instances, tenders shall not be accepted until the appropriate committee shall have considered a report from the Tendering Officer.

## **6 DEPARTURE FROM TENDERING PROCESS**

A written request must be submitted to the Chief Officer to gain permission to make any departure from the tendering policy.

## **APPENDIX**

### **Communities First Procurement Process for Services totalling under £2,000 (To be used for all Communities First activities)**

All activities and services offered through Communities First funding must be accessed from companies who are on the Approved Supplier List. In order to achieve a List which offers quality services, value for money and protection to both participant and procurer the following steps must be followed:

Any proposed opportunity will be advertised via Communities First social media accounts, VAMT website, CF website, the Evol mailing list and placed in the Communities First column in the Merthyr Express. (These publicity requirements remain the same for any service totalling over £2,000 which need to go out to tender).

Organisations/companies are asked to complete an Expression of Interest which will ask them to declare business/organisation information.

Expressions of Interest will be checked by the CF Cluster Manager and VAMT's Chief Officer – providing information is acceptable the company will be added to the approved supplier list.

Organisations who are successfully placed on the Approved Supplier List need to provide documentary evidence of:

- Personal Liability Insurance of £5m,
- Qualifications which are acceptable for them to deliver their services
- Details of DBS checks
- Safeguarding policy

(Details of all the above will be kept on a spreadsheet, monitored by the Communities First Administrator, to ensure that information held is always valid and current)

Where there are multiple providers of the same service, evidence of the rationale behind choosing the successful provider will be maintained.

A Service Contract Agreement is then sent to the chosen service provider, which is signed and returned to the Communities First Administrator to be kept on file.