

## **CAMBRIDGESHIRE ACRE POLICY ON CHOOSING CONSULTANTS, CONTRACTORS AND SUPPLIERS**

### **1. Introduction**

- 1.1. Good procurement is essential in order for Cambridgeshire ACRE to deliver its strategic aims and day to day operations efficiently whilst conserving charity funds.
- 1.2. In buying or commissioning goods and services, Cambridgeshire ACRE aspires to implement good practice, operate fairly and transparently, obtain best value for money and procure ethically, taking into account environmental concerns.
- 1.3. The key aims of Cambridgeshire ACRE's procurement policy and process are:
  - 1.3.1. Value for money - a prime aim of the procurement process is to ensure that best value for money is achieved.
  - 1.3.2. Competition - procurement over certain financial thresholds should be through open competition unless there are exceptional reasons.
  - 1.3.3. Payment on time - suppliers must be paid on time in accordance with contractual arrangements.
  - 1.3.4. Ethical standards - procurement must be undertaken to highest ethical standards, and fairness to suppliers.
  - 1.3.5. Legal aspects - contracts must be in writing and be fair and non-discriminatory
  - 1.3.6. Environmental impact - suppliers will be expected to consider environmental impacts and aim to minimise adverse effects.
  - 1.3.7. Local – goods and services should be procured from local sources when possible, but without compromising competition.

### **2. Responsibility for Procurement**

- 2.1. Staff who need to buy goods or procure services or consultancy support should discuss with senior management (Chief Executive or Head of Business Services) so that appropriate support and advice can be provided throughout the process.

### **3. Policy**

- 3.1. The table below sets out Cambridgeshire ACRE's procurement value requirements:

Value of purchase	Procurement Requirement
Under £1,000	One written quotation following the 'Process for obtaining a written quotation under the Preferred Supplier process'.
Between £1,000 and £9,999	Three written quotations following the 'Process for obtaining three written quotations'.
Over £10,000	Formal tender following the 'Process for a Formal Tender'.

3.2. In certain circumstances deemed appropriate by the Chief Executive, we may tender contracts below £10,000 in value.

3.3. Where a funded project requires the procurement of goods and services, we will follow the procurement requirements of the project's funder, if specified.

#### **4. Process for obtaining a written quotation under the Preferred Supplier process**

4.1. Cambridgeshire ACRE has a number of preferred suppliers for services such as printing, design/marketing, website management etc. These are individuals and organisations with whom we have built a trusted and professional relationship, who we know that work to the high standard required by Cambridgeshire ACRE.

4.2. The staff member commissioning the work will:

- 4.2.1. Write a short specification of the work/product/service required;
- 4.2.2. Identify a preferred supplier from the list on the Preferred Supplier Form;
- 4.2.3. Request a written quotation from the chosen supplier;
- 4.2.4. Complete the Preferred Supplier Form (see Appendix 1) and submit it, plus the written quotation, to a member of the senior management team for sign-off.
- 4.2.5. The senior management team member will review the Preferred Supplier Form and written quotation and either approve or decline based on its merits.
- 4.2.6. Once the preferred supplier is confirmed, permission to start work will normally be given by email.

#### **5. Process for obtaining three written quotations**

5.1. The staff member commissioning the work will:

- 5.1.1. Write a short specification of the work/product/service required;

- 5.1.2. Identify potential suppliers from previous suppliers used by Cambridgeshire ACRE, local knowledge/research and personal recommendation;
- 5.1.3. Request written quotations from the suppliers identified;
- 5.1.4. Convene a panel of staff and partners (typically three people) to evaluate the quotations received on the basis of the specification.
- 5.1.5. The panel will meet, either by conference call or face to face, to agree the chosen supplier.
- 5.1.6. Once a supplier is chosen, a written contract will be agreed, as per clause 7 of this policy.

## **6. Process for a Formal Tender**

- 6.1. Where a full tender is required or deemed appropriate, Cambridgeshire ACRE has a template for compiling an Invitation to Tender (ITT).
- 6.2. When an Invitation to Tender is to be issued as part of a funded project, we will seek to involve the project steering group or delivery partnership in the development of the ITT.
  - 6.2.1. Steering Group / Partnership members who are involved in the development of the ITT cannot bid for the work themselves, as they might be deemed to have an unfair advantage.
  - 6.2.2. If a Steering Group / Partnership meeting sets an agenda item to discuss a potential tender and a Steering Group / Partnership member thinks his/her organisation might wish tender for the contract, they should withdraw from discussions at the start of the process. If they take part in those discussions, then when the ITT is issued, they will be barred from bidding.
- 6.3. We will openly invite tenders through our own website, through partner websites and other local channels, press or procurement sites depending on the contract. This will allow us to demonstrate that we have acted fairly and ensure we get the best value for money.
- 6.4. We will set out specific selection criteria to help us make our decision. If necessary, we will also shortlist the tenders received and interview consultants.
- 6.5. We will always check references for the preferred consultant, contractor or supplier, including an example of similar work they have carried out. Questions we will ask include:
  - 6.5.1. Did they honour the terms of the contract?

6.5.2. Did they deliver on time and within budget?

6.5.3. Was the end product useful?

6.5.4. Was there a good relationship between the contractor and the client?

6.6. Once a supplier is chosen, a written contract will be agreed, as per clause 7 of this policy.

## **7. Agreeing a Written Contract**

7.1. Once a final decision is made on who will complete the work, we will agree a written contract before the work starts. Cambridgeshire ACRE has a 'Contractor Agreement' template for this purpose. Only the Chief Executive can sign the Contractor Agreement on behalf of the Organisation.

7.2. The contractor agreement includes:

7.2.1. Names and responsibilities of the client and contractor

7.2.2. Fees and other payment schedules

7.2.3. Other costs (including out of pocket expenses)

7.2.4. Insurances

7.2.5. Deadlines

7.2.6. Details of what the contractor is expected to deliver (the outputs)

7.2.7. Ownership of the outputs produced

7.2.8. Details of who should receive the outputs

7.2.9. Data protection requirements (including completion of a supplier compliance questionnaire)

7.2.10. Safeguarding requirements (where appropriate)

7.2.11. Confidentiality agreement

7.2.12. If it is acceptable for the contractor to sub-contract.

## **8. Managing consultants, contractors and suppliers**

- 8.1. We will keep in regular contact with the consultant, contractor or supplier throughout the time they are working on our behalf to keep abreast of progress with delivery and to ensure that they are sticking to the agreed programme.
- 8.2. If the outputs include a written report, we will ask for a draft report so we can ensure it is being written in a way that is appropriate to the needs of the project or programme.
- 8.3. If, for any reason, we were unhappy with the work once completed, we would address this with the consultant, contractor or supplier as soon as possible. If the matter could not be resolved, we could take legal action if we felt the agreed contract had not been fulfilled.

## 9. Exceptions

9.1. There are two exceptions to this policy:

- 9.1.1. IT equipment (e.g. laptops) is purchased through our support contract with Chess ICT.
- 9.1.2. Stationery/office equipment is purchased through our preferred suppliers, Lyreco or ESPO.

*Version in use: Approved by the Board on 6-Nov-2019 (Para 7.2.10 add post Board approval to reflect new operational requirements)*

Appendix 1

**CAMBRIDGESHIRE ACRE**  
**PREFERRED SUPPLIER COMMISSIONING FORM**

Staff member commissioning this work:	Insert your name	
Short specification of work being commissioned including timeframe for completion:	Insert details of the work you wish the supplier to deliver and any deadlines for delivery.	
Please tick ✓ the type of activity you are commissioning:	<input type="checkbox"/>	Printing
	<input type="checkbox"/>	Design/Marketing
	<input type="checkbox"/>	Website Creation/Maintenance
	<input type="checkbox"/>	Consultancy / Neighbourhood Planning Support
Preferred supplier approached:	Copy and paste in the details of your chosen supplier from the list on reverse.	
Quotation amount:	£xxx  Please state if the amount is VAT inclusive or if VAT needs to be added. Please also append a copy of the quotation received to this form.	
Please tick ✓ to make a declaration of interest as the staff member commissioning the work:	<input type="checkbox"/>	I confirm that I will make no direct or indirect financial gain from the appointment of this supplier nor do I have any conflict of loyalty through family, friendship or other relationship.
Senior Manager reviewing this commission:	Senior manager to insert his/her name	
Senior Manager to tick ✓ to indicate decision made:	<input type="checkbox"/>	Decline - further questions to be asked
	<input type="checkbox"/>	Decline - need to ask for further quotes
	<input type="checkbox"/>	Decline - need to go out to full tender
	<input type="checkbox"/>	Approve - please proceed with purchase
Senior Manager's signature:		
Date of decision:	Senior manager to insert date of decision	

## List of Preferred Suppliers

### Printing

Victoire Press <http://www.victoirepress.com/>

Ely Print Centre <https://www.elyprint.co.uk/>

East Cambs Print Services <https://www.eastcambs.gov.uk/content/east-cambs-print-services>

### Design/Marketing

Prominent <https://www.prominentpr.co.uk/>

Geoff Shirley Design <http://geoffshirleydesign.co.uk/>

Coral Walton Design [coral.design@ntlworld.com](mailto:coral.design@ntlworld.com) (no website)

Keystone Marketing <https://keystone-marketing.co.uk/>

Black Pig <https://www.blackpig.co.uk/>

### Display Banners/Exhibition Stands

Display Wizard <https://www.displaywizard.co.uk/>

### Website Creation/Maintenance

Isle Interactive <https://www.isleinteractive.co.uk/>

Keystone Marketing <https://keystone-marketing.co.uk/>

Black Pig <https://www.blackpig.co.uk/>

### Consultancy

Community Buildings Architect – Civic Architects <http://www.civic.org.uk/>

Local Authority engagement – N-MAC Consulting Limited / Cecilia Tredget

### Neighbourhood Planning Support

Nupremis Cambridgeshire Limited <http://www.nupremis.net/>

Modicum Planning <https://www.modicumplanning.uk/>