Lympstone Parish Council Quotation and Tenders Policy

The following policy was adopted and agreed by Lympstone Parish Council on **8th April 2024.**

The following policy was reviewed and approved by Lympstone Parish Council on **13th April 2026.**

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Introduction

Lympstone Parish Council (LPC) from time to time needs to obtain quotes and tenders to complete its aims and objectives. LPC is committed to spending public money wisely, efficiently and to achieve best value. Neither LPC, 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 LPC's Standing Orders and Financial Regulations.

Purpose

The purpose of this policy is to ensure that:

• LPC procures supplies, services and works that meet the defined and agreed essential needs of LPC 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 LPC 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 LPC's tendering and quotation processes;

Quotations

The formal quotation process shall comprise of the following steps:

i. A specification of the goods, materials, services shall be drawn up and agreed by LPC following the template below:

"Lympstone Parish Council are seeking quotes for (detailed description, including sizes, addresses etc). Please include with your quote an explanation of how you will complete the work, copies of your Health and Safety Policy, sample risk assessment and copies of competence certificates for the machinery that will be used. We strongly suggest and encourage you to visit the site to view the work for yourself. The successful contractor will need to provide copies of insurance, health and safety policies and risk assessments prior to commencing any work. Quotes must be received by (date and time) If you have any queries or would like to arrange an attended site visit, please do not hesitate to contact me."

ii. LPC reserves the right to discount and not consider any quotations received after the specified deadline.
iii. A public notice for quotes estimated to exceed £5,000 will be placed on LPC's website and Facebook page and if appropriate in the Lympstone Herald.
iv. Once received the quotes will be discussed and assessed by the Council and a contractor appointed by resolution of LPC.

Tenders

The formal tender process will apply to any works over £1,000 excluding VAT and shall comprise of the following steps by the relevant committee:

i. A specification of the goods, materials, services 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 LPC's Contract 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. LPC reserves the right to discount and not consider any tenders that are received after the deadline, not in the specified format or that are incomplete. A public notice of the tender will be placed on LPC's Facebook page and website and if appropriate in the Lympstone Herald.
iii. Tenders that are submitted in hard copy are given unopened to the Clerk of LPC and opened at an LPC public meeting. (Recording date received)
iv. Tenders that are received electronically will be printed off and placed in an envelope to open at an LPC public meeting. (The email and attachment received will remain on the system as proof and recording date received).
v. Once opened the tenders will be assessed by the Council and a contractor appointed by resolution of LPC.

Tender Days

A tender day is where all interested contractors will have the opportunity to attend the site with at least two members of LPC at a certain day and time.

The group will walk around the site with LPC 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 LPC's representatives return from the meeting 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 LPC 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 and LPC's requirements.
• 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 LPC will:
• Assess each quote or tender individually.
• Consider 'Best Value'.
• Consider requesting additional information from each contractor.
• Consider holding an interview with each contractor.
• Reassess all of the tenders against the additional information and best value.

Checks:

- Complete background research on the contractors, such as looking at Facebook comments, reviews online etc.
- Request examples, including photographs of similar works previously completed.

Other
LPC 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 LPC policies. Any relevant quotes or tenders will be circulated to all appropriate contractors on the list.

Emergency Situations
Any emergency situation will be reported to the Clerk who holds all contact details of contractors.
Reference LPC Financial Regulations:

4.5. In cases of extreme risk to the delivery of council services, the clerk may authorise revenue expenditure on behalf of the council which in the clerk's judgement it is necessary to carry out. Such expenditure includes repair, replacement or other work, whether or not there is any budgetary provision for the expenditure, subject to a limit of £1,000 excluding VAT. The Clerk shall report such action to the Chairman as soon as possible and to the council as soon as practicable thereafter.

If the cost is deemed more than £1,000 then as soon as possible the Chairman of LPC and a Chairman of a PC committee is contacted, and if in agreement, work goes ahead. All Parish Councillors will be informed of the situation immediately thereafter.

Payments
If awarded a contract, LPC will pay for services rendered against an invoice for the work. Councillors and the Clerk 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.

Retention – If LPC are not completely satisfied by the completed work then LPC reserve the right to retain a maximum of 5% of the total cost for a period of six months for contracts exceeding £25,000 or until issues are rectified.

Lucy Tyrrell, Clerk and RFO to Lympstone Parish Council

Date of next review: ***April 2027***