



County Wicklow Partnership

Public Procurement Guidelines for LEADER Funding Applicants



Disclaimer: This Guidance Note is issued without liability and is for general information purposes only. County Wicklow Partnership accept no responsibility as to the accuracy or comprehensiveness of content. Each LEADER funding applicant is advised that full adherence to Public Procurement Regulations is a requirement of LEADER funding and that the responsibility to ensure full compliance lies solely with the funding applicant.



Department of Rural and
Community Development

An Roinn Forbartha
Tuaithe agus Pobail



Contents

1. Introduction to procurement.....	3
2. Procurement procedure	4
2.1 Definitions:.....	4
2.3 Two procurement procedures:	5
2.3.1 Category 1: The National Procurement Guidelines:	6
2.3.2 Category 2: LEADER Specific Procurement Guidelines:	9
3. Issues to note on implementing procurement guidelines.....	11
3.1 Specialist markets	11
3.2 Projects above EU thresholds	11
3.3 Audit requirements and sanctions.....	11
3.4 Project file documentation requirements:	11
3.5 Further Information:	12
4. Steps to carrying out procurement on your LEADER project.....	13
5. Key Questions LEADER Applicants Must Answer:.....	15
Appendix 1: Sample Tender specification for supplies / services.....	16
Appendix 2: Sample Score Sheet	19
Appendix 3: Sample letter notifying intent to award	20
Appendix 4: Sample letter notifying unsuccessful tenders of the result of the tender process	21
Appendix 5: Sample letter notifying the successful tender	22

1. Introduction to procurement

LEADER funding for projects involves the distribution of public money for the purposes of rural development. All LEADER funding is therefore subject to public procurement regulations. This means all applicants (community or private) for LEADER funding must adhere fully to the procurement regulations for the purchase of any service, supplies (goods) or works for which LEADER funding is sought.

When we refer to public procurement, we mean that a LEADER applicant has made every effort possible and practical to ensure that their preferred suppliers were chosen in an open, fair and transparent process.

We are required to ask every promoter for documentary evidence at the beginning, middle and end of the process they have undertaken in order to assess costs for their project application.

The required procedures each applicant has to follow depends on the rate of aid, and the total value of the project. Section 2 will detail what each process entails but please speak to your CWP Rural Development Officer for further advice on which procedure should be followed.

It is **the applicant's sole responsibility** to ensure that every stage of their procurement process is undertaken in full compliance with the public procurement regulations and LEADER Operating Rules. The applicant must be able to submit documentary evidence of all stages of the process. The consequences of failing to follow correct procurement procedures will deem any funding application and/or grant payments, including phased payments, invalid.

Information guides, tender templates, contract templates etc. are available to download from www.procurement.ie and www.etenders.gov.ie

Additional guidance may be obtained by contacting The Office of Government Procurement (OGP) at:

Website: <http://www.procurement.ie/contact-us>
Tel: 076 100 8000
E-mail: support@ogp.gov.ie
E-mail: construction@per.gov.ie

The following **Public Procurement Principles** as set out in the Treaty on the Functioning of the European Union (TFEU) apply to all projects, irrespective of value, where public monies are involved:

- a) Fairness
- b) Transparency
- c) Equity (Non-discrimination)
- d) Proportionality

Procurement fundamentals for applicants who wish to secure public funding through LEADER is to:

- Secure the best required Supplies (goods) Services, or Works;
- At the best value for money;
- From the best competent, capable, and compliant supplier(s)

2. Procurement procedure

Generally, LEADER funding is a partial contribution to the cost of delivering a project and must be matched by non-programme funds to meet the full cost of the project. All applicants, at the time of their application to the LEADER programme must justify the cost they are seeking funding for. All applicants must provide with evidence of pricing provided by prospective suppliers. This is to ensure value for money for both the applicant and the LEADER programme.

Depending on the price of the works, services or goods, applicants to the LEADER programme may directly approach suppliers and request quotations for goods. Once the price of works, services or goods exceeds specific thresholds, the applicant must carry out a transparent, public and open competition to decide on which supplier to source works, services or goods from.

2.1 Definitions:

Applicants should note that the description of **works, services and supplies** may be guided by the LEADER Rural Development Officer but typically the following applies:

Works	The build or renovation works required on projects i.e. construction projects
Works related Services	Professional Services required to deliver a successful construction project
Services	Where the project needs the inputs of service providers e.g. professional services or vocational type services.
Supplies	Where equipment or other goods are to be purchased as part of a project.

Applicants should note the difference between a **direct invitation, open and restricted** procedure.

Direct Invitation:	This procedure is used for applicants whose costs are under thresholds for public procurement. The applicant does not have to advertise the costs on e-tenders but may directly approach suppliers to request quotations for a specific quantity of goods, works or services on the basis of a written specification
Open:	Under this procedure all interested parties may submit tenders. Information on tenderers' capacity and expertise may be sought and only the tenders of those deemed to meet minimum levels of technical and financial capacity and expertise are evaluated. If there are minimum requirements it is important that they be made clear Public Procurement Guidelines – Competitive Process 21 in the notice or the request for tenders (RFT) to avoid unqualified bidders incurring the expense of preparing and submitting tenders
Restricted:	This is a two-stage process where only those parties who meet minimum requirements in regard to professional or technical capability, experience and expertise and financial capacity to carry out a project are invited to tender. This is only allowable in over EU threshold projects.

2.2 Obtaining professional procurement advice:

Applicants who have no direct experience of undergoing a public procurement process should obtain professional expert advice to guide them through the process to ensure compliance with the rules and achieve best value for money for the project.

CWP advises that applicants will need to verify that any external procurement expertise they decide to use to assist them in the procurement process has the necessary skills and experience in public procurement processes and regulations e.g.

- Through evidence of relevant procurement qualifications
- Detailed experience of previous verifiable evidence of having operated public procurement processes in the recent past

External sources of public procurement expertise could be found in the following professions:

- Public Procurement Professionals and Consultancy Practices
- Architect Practices with experience of public works and/or individuals with experience of public procurement processes as part of their normal work activities

*****Applicants should also note and subsequently advise any professional that under the LEADER programme, additional procurement guidelines above national procurement guidelines have to be adhered to compared with national procurement guidelines*****

Certification is required at application stage of the LEADER programme from the procurement professional stating that the procurement guidelines were followed correctly for all works projects and for supplies/services projects over the thresholds.

Speak with a Rural Development Officer from CWP to discuss further the procurement guidelines your project should adhere to.

2.3 Two procurement procedures:

Procurement guidelines make a distinction in procurement procedures depending on the grant aid rate the applicant is applying for. The two categories of procurement procedures allow for different procedures to procure their good, services and works.

Category 1	Project promoters that may be awarded total funding of more than 50% of the project costs (from LEADER and/or other public sources), and LAGs/IPs regardless of the levels of support from LEADER, must follow the National Public Procurement Guidelines If you think you are a Category 1 promoter, follow the procedure outlined in 2.3.1
Category 2	Project promoters that may be awarded total funding of 50% or less of the project costs (from LEADER and/or other public sources) may choose not to follow the National Procurement Guidelines outlined in Section 2.3.1; in that instance they must follow these LEADER Specific Procurement Guidelines If you think you are a Category 2 promoter, follow the procedure outlined in 2.3.2

Speak with a Rural Development Officer from CWP to discuss further whether your project would be considered a Category 1 or Category 2 project.

2.3.1 Category 1: The National Procurement Guidelines:

This procedure applies where public funding (from LEADER and public matching funds) is more than 50% of the project costs. A general outline of the requirements is set out below:

Category 1: National Procurement Guidelines		
Type of Contract	Amount (excl. VAT)	Procedure
Supplies & Services	Less than €5,000	Obtain written quotations from a minimum of 2 suppliers
	€5,000 - €25,000	Obtain written quotation from a minimum of 3 suppliers on the basis of responses to written specifications
	€25,000 – EU Threshold (Currently €209,000)	Publish contract notice on eTenders www.etenders.gov.ie – Open Procedure
Works Related Services	Less than €50,000	Obtain written quotations from at least 5 firms on the basis of responses to written specifications or follow the e-tenders process – Open Procedure
	€50,000 – EU Threshold (Currently €209,000)	Publish contract notice on eTenders www.etenders.gov.ie – Open Procedure
Works	Less than €50,000	Obtain written quotations from at least 5 firms on the basis of responses to written specifications or follow the e-tenders process – Open Procedure
	€50,000 - €250,000	Publish contract notice on eTenders www.etenders.gov.ie – Open Procedure
	€250,000 – EU Threshold (Currently €5,225,000)	Publish contract notice on eTenders www.etenders.gov.ie – Open or Restricted Procedure

Key Issues for consideration

Project promoters are advised, where necessary, to obtain legal or specialist advice and to pay particular attention to the following tendering requirements:

a.	Projects involving construction works must adhere to the requirements of the Capital Works Management Framework (CWMF) which is published under the Construction Procurement Reform website. The CWMF is a suite of template tender and contract documents for the procurement of public works and works-related service contracts
b.	Promoters should consider the nature, scale and complexity of the particular project and consult with the guidance material published under the CWMF before determining which procurement and contracting strategy to follow
c.	Project promoters are advised to use the following suite of documents as being most suited to LEADER funded works projects; <ul style="list-style-type: none"> • Works Declaration LEADER (WDL) • Tender & Schedule for Works FTS6 • Instruction to Tenderers (ITT W4 or ITT W5) • Short Public Works Contract (PW-CF6)
d.	Promoters may use alternative documents from the CWMF, however the Short Public Works Contract (PW-CF6) should be suitable for the majority of LEADER works projects given the nature of these investments. Where using the PW-CF6, the winning tender must be selected solely on the basis of the lowest price tendered. For more technically complex works projects, and where the promoter wishes to select on the basis of MEAT, the promoters are advised to use PW-CF5 (Minor works form of contract)
e.	For Works above €50,000, it is recommended, but not mandatory, that project promoters use the prequalification document circulated by the Department (Works Declaration LEADER (WDL))
f.	Promoters should be aware of the national health and safety requirements that apply for works – these are referred to in the pre-qualification document (WDL)
g.	For works related services, the winning tender must be identified on the basis of Most Economically Advantageous Tender (MEAT)
h.	For supplies and services contracts, project promoters may award contracts on the basis of either lowest price tendered or MEAT
i.	The correct Common Procurement Vocabulary (CPV) code must be assigned
j.	A minimum of 21 calendar days must be allowed for responses following the publication date of the advertising notice

k.	Email responses to requests for quotations are acceptable where accompanied by clearly identifiable date and source information
l.	Where a tender amount is considered to be abnormally low in relation to the pre-tender estimate or with respect to the extent of works, services or supply required, written evidence should be sought from the tendering contractors to demonstrate that the price is sustainable
m.	Post-tender negotiations are not permitted i.e. any dialogue that could be construed as "post tender negotiation" on price or that might result in significant changes to the published tender request
n.	Successful and unsuccessful tenderer(s) must be notified of the result of the tender process; these notification letters must be placed be on file

Reasonableness of costs

Where the eTenders process results in less than 3 responses/tenders, the LEADER applicant must demonstrate the additional steps taken to ensure that the project costs are reasonable e.g. consideration by the applicant based on its knowledge and a comparison of costs of similar projects in the same geographical region. In addition, when assessing a project application, the Evaluation Committee must be satisfied with regard to the reasonableness of the costs submitted.

Specialist markets & exceptional circumstances (applies to direct quotations only)

It may not be possible to obtain the required number of quotes when operating in certain specialist markets where there are a limited number of works contractors, suppliers or service providers, or in other circumstances which the LAG considers to be exceptional in nature. In such cases, the applicant must provide written justification for the low number of quotes and an outline of the steps taken to source a sufficient number of quotes. This must be reviewed and evaluated by the LAG who must also demonstrate the additional steps taken to verify that the project costs are reasonable. In addition, when assessing a project application, the Evaluation Committee must be satisfied with regard to the reasonableness of the costs submitted

2.3.2 Category 2: LEADER Specific Procurement Guidelines:

These rules apply in respect of projects that do not come within the remit of the national procurement guidelines i.e. the project is not eligible to apply for more than 50% of costs.

Category 2: LEADER Specific Procurement Guidelines		
Contract Type	Amount (ex VAT)	Procedure
Supplies & Services	Less than €10,000	Obtain written quotations from at least 2 suppliers (these can be sought verbally but responses must be obtained in writing)
	€10,000 - €50,000	Obtain written quotations from at least 3 suppliers on the basis of responses
	Above €50,000	Obtain written quotations from at least 5 suppliers on the basis of responses to written specifications and place notice on local or national newspaper. Alternatively, can publish contract notice on eTenders
Works & Works Related Services	Less than €10,000	Obtain written quotations from at least 2 firms (these can be sought verbally but responses must be obtained in writing)
	€10,000 to €100,000	Obtain written quotations from at least 3 firms on the basis of responses to written specifications
	Above €100,000	Obtain written quotations from at least 5 firms on the basis of responses to written specifications and place notice in local or national newspaper. Alternatively, publish contract notice on eTenders <i>It is recommended that tenderers should complete pre-qualification document – Works Declaration LEADER (WDL). Contact CWP for a copy of this document</i>

Key issues for consideration:

For all contracts, the winning tender may be selected on the basis of the lowest price tendered or the Most Economically Advantageous Tender (MEAT); however, the following is advised:

- Works contracts - project promoters should select the winning tender on the basis of the lowest price tendered
- Works related services contracts - project promoters should select the winning tender on the basis of MEAT

a.	It is recommended that tender respondents should be afforded a reasonable period of time to submit their responses (e.g. 21 calendar days); the time period should reflect the nature and complexity of the proposed project
b.	Where a notice is required to be placed in a local or national newspaper, it should refer to the essential details of the contract together with relevant contact details for further information regarding requirements
c.	Email responses are acceptable where accompanied by clearly identifiable date and source information
d.	Promoters should be aware of the National Health and Safety requirements that apply for Works projects – these are referred to in the pre-qualification document (WDL)
e.	Successful and unsuccessful tenderers must be notified of the result of the tender process; these notification letters must be placed be on file

Reasonableness of Costs

Where the eTenders process results in less than 3 responses/tenders, the applicant must demonstrate the additional steps taken to ensure that the project costs are reasonable e.g. efforts made to try to seek more quotes, provision of expert advice stating that there were limited suppliers in the market for the contact being offered etc.

When the evaluation committee will be assessing a project application, they must be satisfied with regard to the reasonableness of the costs submitted.

Specialist markets & exceptional circumstances (applies to direct quotations only)

It may not be possible to obtain the required number of quotes when operating in certain specialist markets where there is a limited number of contractors, suppliers or service providers, or in other circumstances which CWP and the promoter considers to be exceptional in nature. In such cases, the applicant must provide written justification for the low number of quotes and an outline of the steps taken to source a sufficient number of quotes. This must be reviewed and evaluated by the CWP who must also demonstrate the additional steps taken to verify that the project costs are reasonable. In addition, when assessing a project application, the Evaluation Committee must be satisfied with regard to the reasonableness of the costs submitted.

3. Issues to note on implementing procurement guidelines

3.1 Specialist markets

Where seeking direct quotations in certain specialist markets where there are a limited number of suppliers or service providers, it may not be possible to obtain a suitable number of quotes. In such cases, the applicant must provide written justification for the low number of quotes and an outline of the steps taken to source a sufficient number of quotes. This will be reviewed and evaluated by CWP, the evaluation committee and the LCDC. In addition, the promoter and the LAG must also demonstrate the additional steps taken to verify that the project costs are reasonable.

3.2 Projects above EU thresholds

The EU thresholds at time of publication of this guide are €209,000.00 for supplies and services and €5,225,000.00 for works and works related services. While CWP does not typically provide funding for activities above these thresholds, were such a project to arise, Wicklow LCDC, CWP and Wicklow County Council are to agree an appropriate procurement procedure with the Department prior to any approval of funding so as to ensure adherence to EU public procurement requirements.

3.3 Audit requirements and sanctions

CWP must ensure that the project file contains all of the relevant documentary evidence to clearly demonstrate compliance with the relevant tendering and public procurement requirements. All quotations (except where emails are permitted) must be **signed and dated** by the tenderer to allow independent verification. All documentation must meet the audit requirement of verifiability and have a sufficient audit trail.

3.4 Project file documentation requirements:

Project applicants must ensure correct documentation is provided to CWP to ensure projects are complaint. All project files must contain a Tender Report for all actions, including direct quotations. This report should include (as appropriate) the following -

- i. Request for tender / tender spec
- ii. Evidence of publication
- iii. Responses to those tender requests
- iv. Tender scoring sheets used
- v. Notification of intention to award
- vi. Copies of letters notifying unsuccessful tenders of the result of the tender process
- vii. Copy of letter notifying the successful tender

Where a proposed project is advertised on e-Tenders (or the OJEU), the project file must contain a printout from the e-Tenders website (the e-Tenders 'Audit Trail') which incorporates the various actions and activities during this period. All of the tender documents submitted must be retained by the promoter or his/her representative to allow for subsequent audit or inspection.

Failure to follow correct procurement procedures will result in all or elements of the project being disallowed. A penalty will be applied using the methodology outlined in the European Commission Guidelines on applying corrections for public procurement irregularities. Such disallowances may result in the repayment of previous phased grant payments.

http://ec.europa.eu/regional_policy/sources/docoffic/cocof/2013/cocof_13_9527_annexe_en.pdf

3.5 Further Information:

- Where the eTenders process results in **less than 3 responses/tenders**, the applicant must be able to demonstrate to the LEADER funding organisations satisfaction that additional steps were taken to ensure that the project costs are reasonable e.g. evidence of the cost of similar works and services elsewhere
- In addition, in certain specialist markets where there are a limited number of suppliers or service providers, it may not be possible to obtain a suitable number of quotes. In such cases, the applicant must provide **written justification** for the low number of quotes and **an outline of the steps taken** to source a sufficient number of quotes. The applicant must also demonstrate the additional steps taken to ensure that the project costs are reasonable
- Applicants should note that the **Artificial Splitting of Projects** is prohibited. This may occur where an applicant deliberately and artificially splits project costs to reduce the requirement to comply with the applicable Public Procurement thresholds. The deliberate artificial splitting of projects that exceed the thresholds allowed is strictly not permitted. For a project to be considered eligible as a phased project, it must be stand-alone and operable in its own right
- Applicants must also note that any **Conflict of Interest** within any part of a project is fully addressed and avoided. A conflict of interest is defined as any scenario where a person, persons, or organisation in a decision making role as a buyer (applicant) has a commercial or personal relationship of any type with a supplier organisation. A policy of open declaration and removal from any involvement or influence in decision making is the minimum requirement so as to avoid a conflict of interest scenario arising. It is the responsibility of LEADER applicants to ensure no conflict of interest exists in any sourcing, quotation, tender or purchase situation

4. Steps to carrying out procurement on your LEADER project

Step 1: What category to follow:

Determine whether you should follow **Category 1** or **Category 2** procedures – this will be based on the percentage grant aid rate you are eligible to apply for. Contact your CWP Rural Development Officer for advice on this.

Step 2: What process to follow in my category

Estimate the total value of the project to assess what procedure to follow. If your estimated costs are close to the maximum threshold between two procedures, opt for the procedure required for the higher amount. i.e. applicant looking for grant aid of 50% to cover total costs of estimated €49,500 for supply of equipment – the promoter should follow the procedure for over €50,000.

Step 3: Getting procurement advice

You should now know if you are required to advertise openly on e-Tenders or on a newspaper or whether you can directly seek quotations. Applicants who have no direct experience of undergoing a public procurement process should obtain professional expert advice to guide them through the process. This is to ensure compliance with the rules and to achieve best value for money for the project and the promoter. This is particularly important for works projects and supplies & services contracts which are required to advertised openly.

It is the applicant's sole responsibility to ensure that the correct procedure has been chosen and that it has been followed correctly. CWP carry out an external compliance check on the procurement elements of all projects and if a project is not compliant, then it will not be progressed for a decision until any compliance issues have been addressed.

If you believe you have the skills to correctly complete the procurement process for a direct invitation, supplies or services contract yourself, follow the next steps.

These are for direct invitation projects only (i.e. under threshold projects)– follow guidance from www.eTenders.gov.ie for advice on how to use their website.

CWP cannot advise on completing public procurement procedures for any applicants or cannot certify that procurement work has been completed correctly.

Step 4: Prepare a written specification.

This should detail all items you are looking for LEADER support. Each quote received back from direct invitation should be for the same type of item and the same number of items. Note that in a tender specification, you are not allowed limit the types of response in any way. For example, do not mention any brand names as this means that other suppliers of similar type equipment will be restricted from supplying a quote. A sample tender spec is included in the Appendix 1 of this document.

Step 5: Seeking Responses to your written specification

Publish the specification on a relevant newspaper or website and/or email the tender specification to a series of tenderers who you think might be interested in supplying you with the supplies or services

detailed in the specification. (Keep copies of the emails to show that you sought quotes from a series of parties.) Each supplier should be informed as to how each tender returned will be scored on. If the tender is to be selected on the basis of lowest price you must inform suppliers of this. If there are other factors you would like to consider such as experience, value for money, or health & safety, a scoring sheet will have to be supplied to each tenderer. Also inform each tenderer of the deadline response date and time.

Step 6: LEADER Application

Collate all returned tenders and choose a winning tender based on the scoring system decided on in the previous step. You will apply to LEADER for the of the eligible grant aid rate of the total amount of the winning tender(s).

Certification is required at application stage of the LEADER programme from the procurement professional stating that the procurement guidelines were followed correctly for all works projects and for supplies/services projects over the thresholds.

Step 7: LEADER Decision

If you have been successful with your LEADER application, congratulations! You can now inform the tenderers of the outcome of the procedure and contract the winning tenderer to complete the work as outlined in the written specification. At this stage appropriate letters must be sent to successful and unsuccessful tenderers informing them of the outcome of the Procurement process.

Keep copies of these letters to supply to CWP to show that each tenderer was appropriately informed about the outcome of the process.

Step 8: Undertaking work as tendered

You can now start working on your project as detailed in your application. You will not be permitted to change suppliers of items or the specification of items being bought. Ensure that the winning tenderer(s) are informed that they will be required to carry out the work as specified and will also be required to have LEADER specific information on each invoice, be required to submit a TCAN (tax clearance access number) at the time of payment of each invoice and any other compliance evidence before LEADER can pay out on any project.

Please see the appendix for samples of the following

Appendix 1: Sample Tender specification for supplies / services

Appendix 2: Sample Score Sheet

Appendix 3: Sample letter notifying intent to award

Appendix 4: Sample letter notifying unsuccessful tenders of the result of the tender process

Appendix 5: Sample letter notifying the successful tender

These sample templates are to be used as a guide only. Your procurement professional can advise on the correct wording requirements for your specific project.

5. Key Questions LEADER Applicants Must Answer:

1. Has the applicant clearly made a determination on whether they are a Category 1 or Category 2 applicant?
2. Has the applicant informed themselves of the applicable procurement processes and requirements that apply to categorisation i.e. as a Category 1 or Category 2 project?
3. Has the applicant evidence of having developed a clear comprehensive RFT (Request for Tender) document which identified the exact requirement tender specification, qualification criteria (if applicable), and award criteria?
4. For projects advertised on e-Tenders, does the project file contain a printout of the Audit Trail Report, verifying all activity on the site from tender publishing date to the appropriate response deadline date?
5. Does the project file contain a Tender Report, which includes all tender documents, an assessment of tenders/score sheets and evidence as to why the successful tenderer was chosen?
6. Were all valid tenders evaluated in accordance with the criteria specified in the RFT?
7. Have the requisite number of tenders been obtained for supplies/services/ICT/works in accordance with the thresholds for Category 1/ Category 2 promoter?
8. Have all original written tenders/quotations been signed and dated by the tenderer?
9. Have all electronically submitted quotations been accompanied by clearly identifiable and verifiable date and source information?
10. Has the applicant included completed schedule of the quotations/tenders on project file?
11. Have all tenders been received within the specified response deadline?
12. Have any post tender negotiations occurred i.e. any dialogue with tenderers on price, resulting in changes to the published tender? This is not allowed.
13. Have all tenderers been notified of the outcome of the tendering process, 14 days before issue of letter of acceptance to winning tenderer? (Standstill period).
14. Where the procurement process results in <3 responses/tender have additional steps been taken to ensure the costs are reasonable?

Appendix 1: Sample Tender specification for supplies / services

INSERT COMPANY LOGO HERE

REQUEST FOR QUOTATION

Company Name

RFQ Title

Disclaimer: This template is issued without liability and is for general information purposes only. County Wicklow Partnership accept no responsibility as to the accuracy or comprehensiveness of content. Each LEADER funding applicant is advised that full adherence to Public Procurement Regulations is a requirement of LEADER funding and that the responsibility to ensure full compliance lies solely with the funding applicant.

COMPANY TITLE : PROFILE & BACKGROUND

Give general background of Business

REQUEST FOR QUOTATION

We are requesting quotation for the supply of the following items

General overview of supplies/services requirements

Technical Specification for items

More detailed specifications of required items:

QUOTATION FORMAT:

The following information MUST be included on all quotations submitted as part of an application for LEADER funding:

Title: The document must be titled a Quotation and not an order, an invoice, a proforma or any other name. It should have a quote number or reference if relevant.

Supplier Details: The name, address and contact details of the person, organisation, business or company providing the quote should appear on the quote. This must include the VAT registration number of the provider if registered for VAT.

The quote should be addressed to:

NAME OF COMPANY

ADDRESS OF COMPANY

Or alternatively emailed to: COMPANY EMAIL

Date: The date on which the quotation is issued should be clear.

Details: The details of the individual items and individual aspects to which the quote refers should be clearly specified and set out in the quote.

Cost: The cost of all the individual elements / items should then be added to give a total net cost. Costs in the quote should be clearly identified in the correct currency Euro (€).

VAT: The VAT rate and the VAT amount should be clearly identified should be calculated and included clearly and separately on the quote.

Total Cost: The total cost (which includes the VAT) on the quotation should also appear.

Format: Quotations received in hard copy must be signed by the person providing it. Quotations received by email must be attached to company email account showing details of company

Turnaround Time: The projected turnaround time for delivery and commissioning should be clarified

PROOF OF SUPPLIER CREDENTIALS (SELECTION CRITERIA)

Optional

A statement of technical knowledge, experience and ability to be provided. (In order to meet criteria specified, suppliers must have a minimum of X years experience in this field.)

A statement of Tax Compliance with the Irish Revenue to be provided (copy of Tax Clearance Cert/TCAN will be required prior to purchase)

QUERY HANDLING

Any requests for clarification in relation to this document and any of the requirements specified therein must be made to:

COMPANY NAME

COMPANY ADDRESS

COMPANY EMAIL

DEADLINE FOR RECEIPT OF QUOTES

INSERT DEADLINE DATE HERE

EVALUATION OF QUOTES AND AWARD CRITERIA

Quotes will be evaluated solely on the quality of the content of the quotation.

The quotes will be scored as follows:

Technical Specification of Products Offered:

Scoring Criteria	Score allocated
Overall technical characteristics and specification of product	XX
Product back up/servicing ability	XX
Overall cost of product	XX
Total	100

The tender score for price will be achieved by applying the following formula:

$$\frac{\text{Score} \times \text{Lowest Tendered Price}}{\text{Tendered Price}} = \text{Tender Score}$$

Appendix 2: Sample Score Sheet

Scoring sheet for quotes received for "Project Name XXXX"					
Supplier Name	Competencies (mark as indicated)				Total Marks (100)
	<u>Value for Money</u> (X)	Implementation, Experience & track record (X)	Skills & Competencies (X)	<u>Compliance*, Health & Safety</u> (X)	
Name Company 1	€0,00.00 excl VAT (Score)				
Name Company 2	€0,00.00 excl VAT (Score)				
Name Company 3	€0,00.00 excl VAT (Score)				
Name Company 4	€0,00.00 excl VAT (Score)				
Name Company 5	€0,00.00 excl VAT (Score)				

*Compliance is to include documentary evidence of **appropriate Insurance cover** while working on the project and **Tax compliance** at start of project

Winning Tender: _____

Evaluator Name(s): _____

Date: _____

Appendix 3: Sample letter notifying intent to award

Name,
Address 1,
Address 2,
Address 3,
Date

Re: Name of competition

Dear Company B,

I refer to your tender for the above contract.

I write to inform you that we intend to issue a Letter of Acceptance to you after receiving all the following items:

- Performance Bond in the form included in the Works Requirements
- Evidence of the insurances required by the contract
- Tax Clearance Certificate
- *[add any other requirements, e.g. parent company guarantee, collateral warranties]*

If any of the above listed items is not provided within 14 days of the date of this letter, we may proceed to award the contract to another tenderer.

[Award of the contract will also be conditional on *[add any other conditions, e.g. funding approval, manager's order, board approval]*].

This is not the Letter of Acceptance/ a Tender Acceptance. The Employer has not accepted your tender.

Please return a copy of this letter acknowledging receipt as indicated below.

Is mise, le meas

Signed _____

On behalf of *[Name of Employer]*

Appendix 4: Sample letter notifying unsuccessful tenders of the result of the tender process

Name,
 Address 1,
 Address 2,
 Address 3,
 Date

Re: Name of competition

Dear Company B,

I refer to your recent tender in respect of the above contract. The tender evaluation process has now been completed and I regret to inform you that your tender submission has not been selected for contract award on this occasion.

The successful tenderer was **XX**. For information purposes the following were the scores achieved by your tender against each of the award criteria:

Criteria	Maximum Marks	Company B	Company A (successful tenderer)
Relevant Experience of Training Provider	300		
Quality of Proposal / Added Value	300		
Price	400		
Total	1000		

I would like to take this opportunity to thank you most sincerely for your participation in the tender process and wish you every success in the future.

Yours sincerely,

 Name
 Job Title

Appendix 5: Sample letter notifying the successful tender

Name,
Address 1,
Address 2,
Address 3,
Date

Re: Name of competition

Dear Company A,

I refer to your recent tender in respect of the above contract.

The tender evaluation process has now been completed and I am pleased to inform you that you have been selected as the successful tenderer in accordance with the tender specification issued.

To avoid delay in proceeding with your appointment please forward information allowing us verify;

- tax compliance
- relevant insurances.

Upon receipt of the above I shall contact you to agree the final stage of the contract award process.

Yours sincerely,

Name

Job Title