

# ***SUPPLIER GUIDANCE ON SUBMITTING QUOTATION AND TENDERING RESPONSES***

## **TOP TIPS**

FEBRUARY 2016

## **1. Introduction**

Trading successfully with public sector customers can make your business a real option for private-sector customers. All public-sector organisations buying in goods and services must get the best value for money. This means they must choose the bid that offers 'the optimum combination of whole-life costs and quality (or fitness for purpose) to meet users' requirement'.

So it is important to realise that bids for public-sector contracts will not be considered just on the lowest price quoted.

The Public Sector is committed to helping small and medium-sized businesses. Small businesses have a lot to offer their local authority.

Small firms can offer:

- greater competition;
- lower costs;
- new ideas;
- responsiveness;
- flexibility;
- quality of service; and
- specialisation.

All of this can mean better value for money for the public sector.

## **2. How to find out about procurement activity for Cheshire East**

Cheshire East Council has an electronic Contract and Tender Management System to manage its procurement activity, called 'The Chest'.

This electronic system makes the procurement process leaner, more efficient, more transparent and accessible to the market. The Contract and Tendering System is the preferred method of tendering for procurement opportunities.

Therefore, all potential suppliers to Cheshire East Council will need to register with 'The Chest'. 'The Chest' gives suppliers the visibility to see current opportunities available from Cheshire East Council, along with opportunities from other bodies. 'The Chest' is used by over 30 Local Authorities in the North West of England; by registering on the 'The Chest' you can have the potential to see current opportunities across the North West of England.

When registering you will be asked to specify the goods / services that you provide and the areas / Councils that you wish to provide to. If any Request for Quotes (RFQ's), prequalification questionnaires (PQQ's) or Invitation to Tenders (ITT's) are posted that match the criteria that you have entered when registering you will automatically receive an email notification advising you of the details and deadlines for the required service - you are not obliged to provide quotations or tender if you do not wish to. Full user guides for registering as well as contact details if you require any help are available on 'The Chest'.

Additional supplier information is available on 'The Chest' from the 'Suppliers Area' at the link given <https://www.the-chest.org.uk/>

### **3. Useful Links**

i) Cheshire East Council – Procurement Web Site

<http://www.cheshireeast.gov.uk/business/procurement.aspx>

ii) Cheshire East Council – Procurement Web Site – Link to ‘Doing Business with Cheshire East Council’ (on this page there is a downloadable ‘Selling to Cheshire East Council’.

[http://www.cheshireeast.gov.uk/business/procurement/doing\\_business.aspx](http://www.cheshireeast.gov.uk/business/procurement/doing_business.aspx)

iii) Procurement Toolkit - Cheshire East Council commissioned some training for SME’s a few years ago now and a procurement tool kit has been developed to help companies to ascertain if they are tender ready and to provide some practical tips and guidance. To view this document please visit

[http://www.cheshireeast.gov.uk/business/procurement/procurement\\_toolkit.aspx](http://www.cheshireeast.gov.uk/business/procurement/procurement_toolkit.aspx).

iv) The Government has recently launched a new system called *Contracts Finder*. It has replaced ‘Supply2gov’. This is where central Government tender and contract documents above £10,000 are published. It will be the single, online access point, to new public sector contract opportunities, including sub contracting opportunities above £10,000, in addition to closed tender and contract documents.

The site can be found at

<http://www.contractsfinder.businesslink.gov.uk/>

v) Official Journal of the European Union link – contains all above threshold tender opportunities

<http://ted.europa.eu/TED/main/HomePage.do>

### **4. Please find below some general guidance and tips which may help you with your submission.**

1. **Download all of the documentation.**

Please be careful to ensure you download and read all of the documentation e.g. the Request for quotation/Pre-Qualification Questionnaire/Invitation to tender, there will often be more than one attachment.

2. **Read the instructions**

Please read the instructions thoroughly prior to completion of the documentation, i.e. if there is a word limit set, then stick to it. If you are required to follow a numbering convention, make sure you follow it, only provide additional documentation if this is requested and put your answers in the correct places. Failure to follow instructions may lead to an invalid response.

3. **Understand what is required**

Please ensure you read and understand what is required– i.e. the full remit of the service provision, and satisfy yourself that you can meet all of the minimum requirements, before completing your submission.

4. **If you don’t understand anything – ASK!**

If you don’t understand anything – ask a question – you are permitted to ask

for clarification and the Contracting Authority is obliged to provide it but make sure you ask the question within the timescales stated within the procurement Documents and normally this will be via the Chest using the discussions (or Q&A area), otherwise you are not guaranteed a response.

**5. Follow the instructions for communication**

If you need to ask a question or request clarification, always ensure you follow the instructions for methods of communication – i.e. if it states contact x person or use x electronic method by xxx date then endeavour to do that. – It is not permissible to contact individuals within the Contracting Authority's Organisation unless explicitly stated. They may not have the authority to advise you and may not give you the correct information. Please note that, clarifications/responses (not of a commercially sensitive nature) all have to be circulated to all other tenderers.

**6. Allow plenty of time for completion**

Please always ensure you allow plenty of time for completion of your submission – do not leave it until the last minute to start compiling your response and/or to upload your response to 'the chest'. If your submission is 1 minute late, it cannot be accepted – it can take a long time and you may need time to seek further clarification – note the deadlines for this.

**7. Your submission should be as concise as possible.**

The Contracting Authority will have many submissions to evaluate and they won't have huge amounts of time to review lengthy responses. Therefore, try to stick to the word limits/page lengths set and do not include unnecessary attachments unless specifically asked for.

**8. Your response should follow a logical format**

Please ensure your response follows a logical format, is easy to read, and does not require the evaluator to search through reams of documentation to find an answer to a question asked. I.e. ensure it is in number order, appendices are labelled and follow in sequence, and are referred to within the response. Please don't include/ refer the evaluator to generic marketing information and unnecessary attachments unless specifically asked - answer the question where asked.

**9. Use Templates Provided**

Where forms/templates are provided – Please use them! Failure to do so may invalidate your submission.

Do not attempt to alter forms/templates to suit your requirements – they may have been created in such a format to enable efficient evaluation of responses. Any alterations to forms/templates provided may also invalidate your response.

**10. Answer all of the questions asked**

Failure to do so may invalidate your response. Note the evaluation criteria and weighting of each of the questions, this will give you an indication of the importance of the specific topic area to the award decision.

**11. Answer the entire question**

If the question asks for a number of points in respect of a response, please make sure you address each point – failure to do so may lead to poor marks or may even invalidate your response.

**12. If unable to answer a question or unable to meet a requirement, - say so, and Why**

If you are unable to answer a question or unable to meet a specific requirement, then you should clearly state that within your response, and explain why you are unable to meet, and what alternative solution you propose to meet the requirement.

**13. What would lead to automatic exclusion from the process?**

Where a question is indicated as a PASS/FAIL within the evaluation criteria – failure to meet the minimum requirements specified will mean that your response will be rejected. For example, if the organisation states that it is a requirement to agree to the Council's Terms and Conditions of Contract then this means that this is non-negotiable and any requests to negotiate on this will lead to a rejection of your submission.

We will require suppliers to be compliant with all relevant legislation. Examples of the policies we are likely to require are as follows: • Health and Safety policies; • Equal Opportunity policies; • Sustainable Policies.

**14. Do not make assumptions- they may be WRONG!**

Again, if you have any queries –ask! – Raise a query via the communication method e.g. the 'Chest' and within the timescales advised.

**15. Do not assume the Contracting Authority “knows” your Organisation**

Even if your organisation has worked with the local authority before, please do not assume the Contracting Authority knows your Organisation. Approach your submission as if you have never provided any goods/services to the contracting Authority before. Treat your submission as if the Authority knows nothing about your Organisation, and hence provide full details in your response to the questions asked. Contracting Authority's are only permitted to take into consideration information provided within your response. Prior knowledge/experience/ assumptions etc cannot be taken into consideration. This ensures a fair, open and transparent process.

**16. Quality assure your submission.**

Presentation is important. Poor quality submissions give a bad impression of the quality of the goods/services your Organisation provides, and this may be reflected in the scoring of your submission.

**17. Submit your response in plenty of time of the closing date and time**

Do not leave it until the last minute to submit your response - Make sure you submit your response in sufficient time to ensure receipt before the closing date for submissions. - The time and date for completion of submissions is FIXED. Late responses may not be considered.

**GOOD LUCK** and thank you for the interest shown in supplying good/works/services to Cheshire East Council.

A glossary of common procurement terms is also provided within this guide to help you with your submission.

## PROCUREMENT TERMS - GLOSSARY

Acronym	What does it stand for?	What is it?
Award Notice	Usually this is the OJEU Award notice	This is the notice which has to be published in the Official Journal of the European Union (OJEU) within 48 days of the council awarding an EU contract.
Debriefing	Debriefing/Feedback	If you are unsuccessful at Pre-qualifying Questionnaire stage and/or Request for Quotation stage and/or Invitation to Tender stage, you are able to request a debriefing which is constructive feedback on your submission.
E-Auction	An auction/further competition to get better prices	e-Auctions are being used by councils to secure better contract terms and prices for the goods and services they buy. An e-auction allows councils to set up a scheduled event where suppliers can bid against each other to win the council's business. Understandably, this can give councils significant savings on price when compared to previous contracts, but the process of running an e-auction can be complicated and councils using e-auction technology need to be sure that the e-auction process has been backed up with a well run procurement process. There may well be training provided by the council and/or e-auction provided given.
EOI	Expression of Interest	Expressions of interest are sometimes called for as a result of an advert being placed about a project. EOI's can be asked for to aid the council in determining the requirements/market and/or in the main an EOI also means that suppliers are required to complete a Pre-Qualifying Questionnaire (PQQ) for a procurement before they can proceed with the tender documentation.
Framework	An overarching agreement where local authorities can conduct mini tenders e.g. ('call-off' requirements)	An agreement between one or more contracting authorities and one or more suppliers which establishes the terms for the period of the contract. A framework may cover one of many councils, or one or many suppliers and the terms specified may include price and, where appropriate, quantity.
ITT	Invitation to Tender	If a supplier is invited to tender, they have either been successful at PQQ stage and have been invited to the next stage and/or there is no PQQ stage and they are able to bid for that specific tender.
ITQ	Invitation to Quote	This is similar to Request for Quotation (RFQ) and is sometimes used when calling off from a public sector framework.
KPI's	Key Performance Indicators	These are key indicators which need monitoring and reviewing throughout the life of the contract.
Negotiated Procedure	This procedure is exceptional, justifiable in specified circumstances, under which the contracting authority selects at least 3 participants on similar lines to a restricted	

WITH a call for competition	procedure, and negotiates the terms of the contract with them.	
Negotiated procedure WITHOUT a call for competition	This is an even more exceptional procedure, for use in narrowly defined circumstances, under which the contracting authority may negotiate the terms of the contract with one or more economic operators of its choice.	
OJEU	Official Journal of the European Union	This is where local authorities have to place advert notices for above threshold contracts e.g. contracts with a value above the EU threshold, currently £164,176 (These thresholds are reviewed every two years).
Open Procedure	When using the Open procedure all interested parties can tender for the contract. As in other procedures the contracting authority may lay down minimum standards of suitability but it must send out the contract documents to anyone who asks for them.	
PTC	Pre/post-tender clarification	Suppliers and/or the council can ask questions prior/post submission, known as the pre or post tender clarifications.
PTN	Post-tender negotiations	In below-EU threshold submissions the council can, in limited circumstances negotiate with bidders. This is known as post tender negotiations.
PQQ	Pre-Qualifying Questionnaire	A PQQ is the first stage of a restricted tender process and responses to a PQQ will enable the council to assess the technical ability, competence and financial standing of the Supplier for the specific contract they are applying for. If successful, the supplier will be invited to tender.
Restricted Procedure	An EU procurement procedure	This is one of the EU procurement procedures, which is where a Pre-Qualifying Questionnaire (PQQ) is required to be completed by suppliers to assess their financial, technical and professional capacity and capability.
RFQ	Request for Quotation	An invitation or request for quotations to be submitted to the council for goods or services that have an expected value of below the EU limits and where a PQQ is not required.
The Chest	E-Portal for electronic tenders	The Chest has been created with funding from the North West Centre of Excellence to bring together buyers and suppliers making it easier for businesses to find out about new sources of potential revenue and to grow and develop to the benefit of the local economy.

## **5. Training Sessions to help and encourage local and small medium enterprises to tender for business within Cheshire East**

Cheshire East Council funds award winning procurement training workshops to help both local and small/medium enterprises to engage in the competitive tendering process.

These award winning workshops (won a GO Excellence in Public Procurement Award in 2012 and a FSB Business Buddy Award in August 2015) last took place in October 2016 and further events are planned for 2017, subject to demand and available funding.

The types of workshops delivered include:

- **Workshop 1 – Let's get started** – This is an introduction to the tendering process where we will show you how the framework within which public sector tendering operates, how to navigate it and how to prepare for tendering opportunities.
- **Workshop 2 – The Invitation to Tender process** - Moving forward into the ITT phase, you will learn what are the best-practice procedures and structures that you should put in place in your organisation to make sure your bids are as professional as possible and also how working in consortia can provide further opportunities.

Please note: Places are limited, no more than 35 people at each workshop, and businesses will not be allocated more than two places at each workshop.

Businesses are advised that ideally they need to attend both the workshops to ensure they are taken fully through the procurement process.

If you wish to express an interest in attending one of the workshops mentioned above, please e-mail: [business@skillsandgrowth.co.uk](mailto:business@skillsandgrowth.co.uk)