

APPENDIX E

Procurement Plan

Instructions for Completion

1. The Responsible Officer must complete as much as possible on this form in consultation with the Procurement Lead.
2. When editing this form, ensure that you have 'Open in Desktop' so that the text boxes are aligned.
3. The Responsible Officer must consider whether they have appropriate authority to award a contract, ensuring approval is gained from the relevant Corporate Director and Finance Business Partner as appropriate. If the contract is going to be capital funded, it must go to the Treasury and Capital Management Group.
4. 3C Legal Services/the Council's legal advisors should be instructed as soon as possible to provide legal support (if required). Failure to do so may lead to delays in the procurement.
5. All parts of the plan must be completed before approval can be sought to publish the procurement. For procurements valued above £50k, these must be presented to the Procurement Board in accordance with the Contract Procedure Rules before proceeding to tender.

The parts requiring completion are highlighted in blue for ease of reference.

1 Basic Information

Procurement Title	
Name of Responsible Officer	
Team/Directorate	
Contract Value (including VAT) ¹	
Total length of contract (in months)	
Initial term of contract (in months)	
Number and length of extension periods (in months)	
Type of confirmed funding	Choose an item.
Source of confirmed funding	Choose an item.
Finance Business Partner confirming budget	Choose an item.
Budget Code/s	
Allocated officer from Procurement Team	Choose an item.
Date award required by	Choose a date
Current Contract	
If so, when does the current contract end?	Choose a date
CPV Code (include breakdown if mixed procurement) ²	
Which procurement regulations apply?	Choose an item.
Is this a joint procurement? if so state with whom.	

Brief Description of the Procurement:

¹ This should be the maximum possible value over the total term of the contract including any extension periods.

² [CPV Codes - BiP Solutions](#)

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Describe your pre-market engagement, including what steps have been taken to understand what system/solution and direction of travel our neighbouring councils are taking (LGR) if this is not a unique requirement for HDC.

What outcomes does this procurement aim to deliver and how do they align to our [Corporate Plan](#) priorities for Huntingdonshire and the six key goals?

What barriers might be faced by SMEs/VCSEs in this procurement and how might you remove those barriers or reduce them. You should discuss your lotting strategy here as there is a duty to consider breaking your procurement into Lots.

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2 Risk Assessment

Procurement risk³:

Summary of risk	Likelihood	Impact	Mitigation
	Select Score	Select Score	
	Select Score	Select Score	
	Select Score	Select Score	
	Select Score	Select Score	
	Select Score	Select Score	
	Select Score	Select Score	
	Select Score	Select Score	

Contract Risk⁴:

Summary of risk	Likelihood	Impact	Mitigation
	Select Score	Select Score	
	Select Score	Select Score	
	Select Score	Select Score	
	Select Score	Select Score	
	Select Score	Select Score	
	Select Score	Select Score	
	Select Score	Select Score	

³ This should include all the risks presented by the procurement. These risks might be linked to the market, the price, the timescale or any other area.

⁴ You should list any risks that may occur during the term of the contract. If your procurement is valued over the relevant UK Procurement Threshold, speak to the Procurement team about ensuring the risks are properly represented in the procurement documents.

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3 Procurement Process

Which procurement process is being used? Expand further in the box below to explain decision.

Choose process

If you have chosen Competitive Flexible Procedure above, please detail the steps you are using within that process.

Weighting

Price	
Quality	
Social Value (if applicable)	
Price Per Quality Point	
Maximum ceiling price (if applicable)	
Minimum quality score (if applicable)	
Notes	

Procurement Timetable⁵

Event	Person Responsible	Date
Market engagement (optional)	Responsible Officer/Procurement Lead	
Develop Specification	Responsible Officer	
Develop ITT and other relevant procurement documents	Procurement Lead	
Issue ITT	Procurement Lead	
Deadline for clarification questions from suppliers	Bidders	
Deadline for tender returns	Bidders	

⁵ These events can be amended as necessary depending on the type of procurement

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Tender evaluation	Evaluation Panel (to include Responsible Officer)	
Moderation meeting	Chaired by Procurement Lead, attended by Evaluation Panel	
Approval of award	Officer with Delegated Authority	
Notification of award	Procurement Lead	
Due diligence	Responsible Officer	
Standstill period (if applicable)		
Contract award	Procurement Lead	
Finalisation of contract documents	Responsible Officer/ Procurement Lead	
Contract start date		
Contract award notices	Procurement Lead	
Add the contract to the Contract Register	Responsible Officer	

Evaluation Panel - Please provide the names and job titles of those who will take part in the evaluation process.

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4 Contract Management

Type of contract being used:

Choose an item.

Please provide further details about the contract particulars, for example are you requesting a Parent Company Guarantee/Bond, levels of insurance requested etc.

Name of Contract Manager

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5 Checklist

Check Item	Action Required	Response
Conflict of Interest assessments	Have all those involved in the procurement completed their Conflict of Interest declaration?	
Data protection	Has the Responsible Officer determined what the Data Protection/GDPR implications of the procurement are?	
Equality, Diversity and Inclusion	Has an Equality Impact Assessment (EIA) been completed?	
Legal Support	Does this procurement require legal support, either via 3C Legal Services or an external provider?	
TUPE / Pension Staff Transfers	Is there a possibility of staff transfer? If so, please speak to HR/3C Legal Services.	
New IT project	Has a new Transformation Hub project enquiry process been started?	
Environmental	Consider how to support the Council's delivery of its Net Zero targets through your procurement.	
Health and safety	Are there H&S implications in your procurement? If so, speak to the H&S team.	
Financial risk	Ensure that both the supplier financial risk and the budget financial risk are detailed in the risk assessment table above.	
Collaboration / access to contract	Will this contract be shared with others? If so, who and what governance has been put in place?	
Authority to award	The Delegated Authorities Matrix in the CPRs sets out who has the authority to award contracts, ensure that the relevant officer has been briefed.	
Governance	Do you need Committee approval to proceed? Speak to Democratic Services if unsure.	

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6 Approval

Corporate Director's Approval to proceed

By signing this Procurement Plan the Corporate Director confirms that they have no conflict of interest associated with this procurement.

If the Corporate Director wishes to delegate authority to approve this plan, a reason for that delegation must be provided alongside the name and job title of the officer being delegated to.

Name of Corporate Director	
Date of approval	

Procurement Manager approval to proceed

Name of Procurement Manager	
Date of approval	

Delegated Corporate Director Approval

Name of Officer	
Job Title	
Reason for delegation	
Date of approval	

Endorsement from Procurement Board

Date of Procurement Board	
Procurement Board decision?	

Chief Executive / S151 approval – For contracts estimated to be up to £500k

Name	
Date of approval	

Cabinet Approval – For contracts estimated to be over £500k

Date of Cabinet meeting	
Cabinet decision?	