



# Procurement Basics

# The WMCA and Public Sector Procurement

- Although a devolved authority, with a certain level of discretion around how we procure our goods and services, the WMCA is still bound by the UK Procurement Regulations, PCR2015, UCR2016 & CCR2016. These provide a framework in law, stating the processes we must follow when procuring Goods or Services with tax-payers funds.
- The Regulations stipulate procurement thresholds for public contracts involving Goods, Services and Supplies, Utilities and Concessions. If the WMCA is awarding a contract above these thresholds then the full weight of the regulations apply, if the value is under, it is deemed to be a 'below threshold' contract which provides us with much more flexibility in the processes we use, particularly in respect to timescales.

# Procurement Routes

- There are broadly 3 ways that we undertake our procurement activity at the WMCA:
- **Low Value Requirements (Invitation only)**– For low value goods or services we encourage the use of a quotation system. Based on the contract value, our internal stakeholders have the option to approach a company directly to provide a quote for a piece of work or invite/select a minimum of 3 suppliers to a competitive quotation process for any requirements of a higher value, but which still fall under the relevant procurement threshold.
- **Framework Call Off's (Closed Tender)** – Think of a framework as a list of pre-qualified suppliers. They provide both public and private sector organisations with a compliant route to market and access to a range of suppliers that have already been assessed for their financial strength and their capability and capacity to deliver the type of work that the scope of the framework covers.
- **Above Threshold Tenders** – For any contract above threshold (for example £213,477 inc VAT for Goods/Services) that cannot be procured through a framework, we will often publish an Open tender, giving any supplier in the market the opportunity to submit a proposal in response to our call for competition. We will typically publish a contract notice in 2 locations on the internet, Find a Tender Service & Contracts Finder, after this has been done, we might also advertise the tender opportunity through our social media channels for example.

# The process for submitting a bid – RFQ's

- **Low Value Request for Quotations** – You will receive an email directly from the stakeholder with a copy of the specification, the draft contract and an RFQ document. The RFQ document should specify the award criteria including the weighing for both the quality questions we're going to evaluate your responses to, and the commercial element, for example the fixed price we're asking you to provide. Upon receiving the quotation there are some important dates you need to be aware of:
- **The date for clarifications** – This is the timeframe you have to ask questions about the specification or suggest changes to the draft contract. We will share responses with all suppliers unless they are deemed to be commercially sensitive.
- **The date for submissions** – This is the deadline for you to email the stakeholder back with a proposal if you're interested in bidding for the opportunity.
- Once the deadline for submissions has passed, all qualifying responses will be evaluated in line with the criteria we've specified in the RFQ document after which the results will be announced. At this stage we will inform all bidders of the outcome, providing them with their scores and some light touch feedback.

# The process for submitting a bid – Frameworks

- **Frameworks** – Traditional Frameworks are closed, meaning if you are not successful in being appointed to it at the beginning, you cannot be involved in any 'Call Off's that are undertaken over its duration.

If you are awarded a place on a framework that we decide to use, then the process for submitting a bid will be:

- If you haven't done so already, you will receive an email asking you to register on our procurement portal. All the WCMA's tender activity is done electronically, so if you want to be invited to bid you must register. The registration process itself is free and takes 10 minutes to complete.
- When the ITT is published, you will receive an invite via our procurement portal, there will be an ITT pack which again should as a minimum contain a copy of the specification and an ITT (invitation to tender) document outlining the scoring criteria. If we wish to make amendments to the standard framework call off contract, we will provide a draft version of the contract with the amendments included.
- Again the 2 dates to be aware of are the deadlines for both clarification questions and submissions. Depending on the value you may also need to meet our financial thresholds at this stage which will be clearly outlined for you.
- After the deadline has passed, we will evaluate all qualifying bids and award as we would with an RFQ.

# The process for submitting a bid – Open tenders

- Find the contract notice on Find a Tender or Contracts Finder, this will provide a link to our Procurement Portal.
- If you haven't already, register on our portal, search for the project/ITT reference number provided & download the tender documentation.
- Again, there will be 2 important dates at this stage, the date for clarifications and the date for submissions. As part of the ITT pack you will also be provided with a document which states the financial thresholds we expect you to reach in order to be considered for the opportunity, if you cannot meet the thresholds but still wish to submit a bid, you will have the opportunity to engage with the WMCA Finance Team via our E-procurement portal during the clarification period to agree a range of mitigations that we would insist upon should your proposal go forward and be successful.
- When you access the documents there will be a series of 'Envelopes', Qualification, Technical and Commercial. The Technical and Commercial envelopes are straight-forward, the one that takes the longest to complete is the Qualification envelope or the SSQ. This is the Government's 'Standard Selection Questionnaire' which is used to assess an organisations capacity and capability to deliver the contract and to evaluate its financial standing. This is often the thing that puts SME's in particular off bidding for tenders, but the information we ask for in many areas is fairly basic and the whole thing can be completed in an hour or two. If you look at the SSQ and you are unsure of anything, you have the clarification period mentioned above to ask any questions, which the procurement team will respond to. Once you have completed the SSQ and uploaded the relevant information in both the Technical and Commercial envelopes you can essentially submit your proposal.

# The process for submitting a bid – Open tenders continued...

- Once the closing date for submissions has passed, responses will be downloaded and all bidders that have successfully passed the requirements of the SSQ (including the financial standing assessment) will move forward to have their proposals evaluated in line with the award criteria stated in the tender documents.
- When all bids have been evaluated and a successful bidder identified, we will issue a 'Standstill' letter to all bidders through our portal. This will provide information such as the name of the winning bidder, your scores, the scores of the winning bidder and some comprehensive feedback on your submission. We will then enter a 10-calendar day 'standstill period' before entering into contract.

# General guidance for submissions

- We advise all bidders to ensure that they upload their submissions well in advance of the response deadline. This is to ensure that if you have any technical issues uploading documentation, or you forget to upload an important file, you have enough time to rectify this before the deadline expires. **Please note we will not accept late submissions or tender amendments.**
- Always refer back to the specification when answering a quality question. We cannot score content that we cannot find, clarity, directness and succinctness are key.
- Note the response limit for each question, whilst we may be flexible if submissions exceed the limit by a few words or so, if they substantially exceed them, we reserve the right to penalise bidders by removing the additional content from the end of their quality submissions.
- Content that is relevant to our specification can score good marks; irrelevant or peripherally relevant content will score low marks.
- Do not contact any officers of the WMCA directly regarding live Open or Framework Tenders. All communication must flow through our portal to ensure a robust audit trail is maintained.



# How can you get involved?

- **Low Value Requirements** – Find out who your contact is at the WMCA, you can do this either by contacting us through our website or using apps such as LinkedIn to search for a relevant person. Once you've identified someone, send them an email or some marketing material, explaining the goods and/or services you can offer. They may then keep you in mind when a future opportunity arises.
- **Frameworks** - Frameworks are **the** preferred procurement route, not just for the WMCA but for the majority of public sector organisations, they typically operate for a period of 4 years from the time they are awarded but can sometimes be longer. There are many framework providers in the market, but the largest one is CCS (Crown Commercial Services), if you would like the opportunity to be appointed to one of their frameworks, you should keep an eye on their website for details of forthcoming opportunities. At present traditional frameworks are static, meaning that the suppliers that are appointed on day one will be the same ones for the next 4 years, there is no option for others to join. Some framework operators have specialized frameworks called a DPS or 'Dynamic Purchasing Systems' which do allow new suppliers to be onboarded if they can meet certain criteria, these are a great opportunities for SME's and VCSE's to engage in public sector tender activity.
- **Above Threshold Tenders** – Keep a regular eye on both Find a Tender Service and Contracts finder for any live or forthcoming opportunities. This is where the WMCA will publish opportunity notices for any work not covered by the RFQ and Framework routes above.

# In closing...

The WMCA is committed to engaging with organisations of all shapes and sizes, but particularly SME's and VCSE's located in the region. We try to make it as painless as possible for you to get involved in our procurement activity, but it's important to remember that we must treat all suppliers equally, ensuring compliance with the Regulations where applicable.