



Department for
Energy Security
& Net Zero



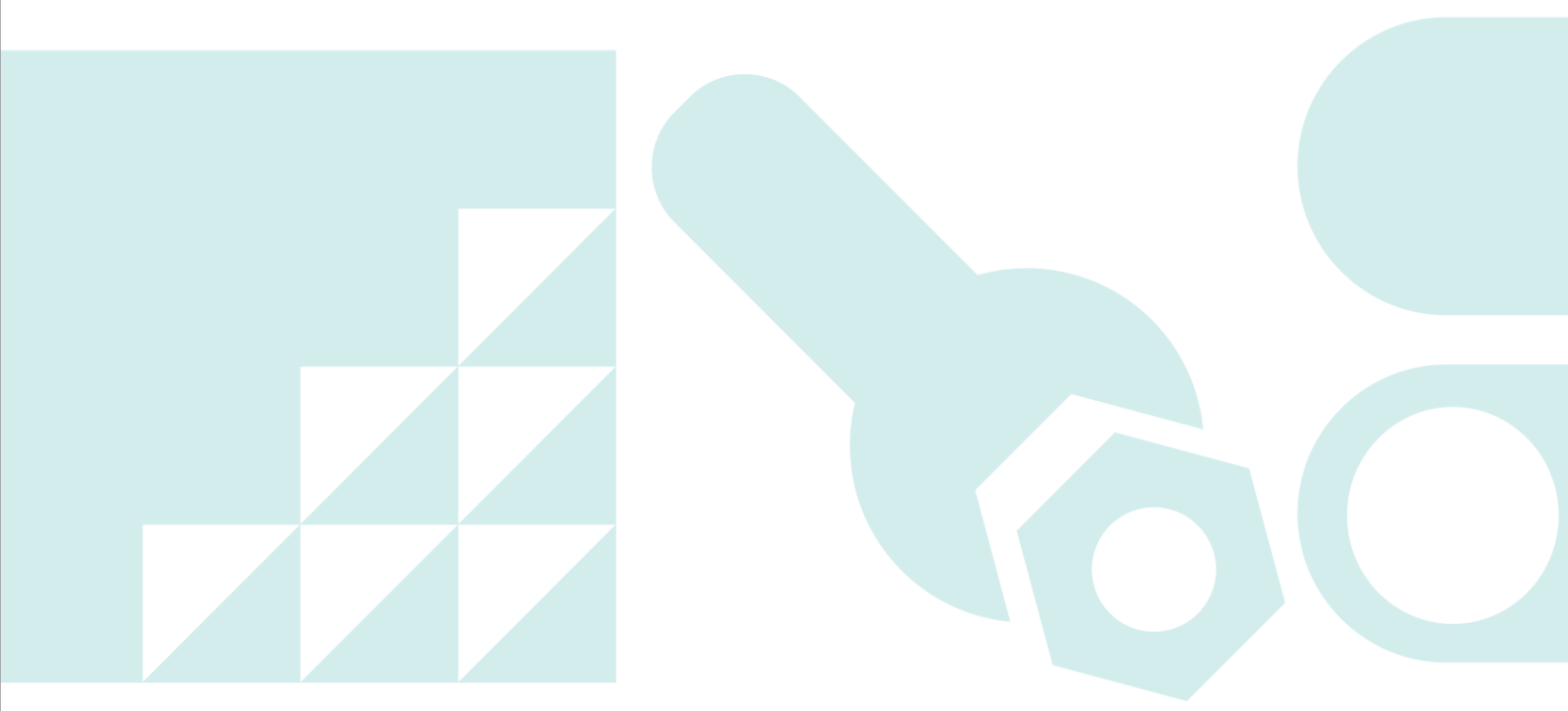
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Energy Systems

Procurement: Running a procurement event checklist



Public Sector
Decarbonisation
Guidance

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1. Summary

Procurement is the route by which you will purchase the goods, works and services you need to implement your decarbonisation strategy. Without being able to procure effectively, the outcomes defined in your strategy are unlikely to be delivered.

Procurement can be a complex and overwhelming process, especially for those who are new to it. However, procurement is a crucial component of any organisation, as it involves the process of acquiring goods, works, or services from an external source.

Remember that procurement is not just about buying goods or services, but also about building relationships with suppliers and ensuring that the goods or services you receive meet your requirements and standards. This guide is designed to help you to navigate this process - a checklist approach has been developed to help you consider, plan and then accomplish the majority of activities required to run a successful tender.

Please refer to supporting guidance in [Theme 3- Procurement](#) that provides more detail and a full explanation of the steps discussed in this guide.

The checklist has been broken down into 4 key stages:

- Pre – tender
- Tendering
- Evaluation
- Handover

We welcome your feedback on these resources, please email ESC at PSDecarbGuidance@es.catapult.org.uk

Please note that there may be specific, additional activity that your in house Procurement team may wish you to include and undertake as part of the process.

2. Checklist

The following checklist has been developed for you to start to consider the steps and activities required to successfully complete a procurement event. Whilst not exhaustive, it offers a good starting point for any procurement activity - use it to ensure you have covered all the essential areas.

Additional context and further information can be found at the following locations:

Resource	What does it provide you with?
Procurement process guide	See our procurement process guide which starts to explain about the different tender procedures and how to run them
CCS Frameworks	You can download this guide which lists all of the CCS frameworks and DPS agreements you may wish to consider using.
Net Zero go	Contains information on procurement routes relevant to Local Authorities

Consider the following:

Stage:	Checklist criteria	Supporting considerations	Decision: Include / Not required / Gap	Action to take forward
Pre-tender	Resources available.	• Within organisation or obtain consultancy support?		
Pre-tender	In house Procurement team available and engaged.	• Lead or support role? • Resource available? • User group / regular touchpoints in place and agreed?		
Pre-tender	In house Procurement process in place that can be followed.	• Process / contract routes available? • Delegations of authority and approval in place and agreed? • Policies and guidelines in place?		
Pre-tender	In house Legal team engaged	• Support role – resource available?		

Pre-tender	Approach to engaging stakeholders.	- Internally: identified, and engaged appropriately with, your key stakeholders - Externally: considering existing suppliers and potential new organisations		
Pre-tender	Expected timeline considered and included in overall plans?	- Steps identified, positioned and agreed - Resources in place for duration of activity		
Pre-tender	Scope clarified and confirmed.	- All the technical (and other) requirements identified - Do you have a defined specification for the desired outcome or a design idea?		
Pre-tender	Procurement route selected and fit for purpose.	- Open Tender or Restricted with Negotiations Tender? - Any additional % charge levy that needs to be accounted for financially?		

Pre-tender	Advertising approach confirmed.	All procurement documents, Under Public Contracts Regulations 2015 competitions must be advertised publicly through: • for free direct download • from the internet • from the time they are sent to participants in the process, and • with unrestricted access		
Pre-tender	Risks captured and fed into governance?	• Captured and added to specification • Process in place to communicate and additional risks identified during event		

Stage:	Checklist criteria	Supporting considerations	Decision: Include / Not required / Gap	Action to take forward
Tendering	Documentation.	• Technical specification content • Expected outputs and outcomes • Terms and conditions		
Tendering	Timeline for Tender.	• Release date • Submission deadline		
Tendering	Tender response format.	• Detail level for responses • Service level agreement for queries (e.g. 24 hours) and answering queries and questions • Format for costs and deliverables		

Stage:	Checklist criteria	Supporting considerations	Decision: Include / Not required / Gap	Action to take forward
Evaluation	Tender evaluation process agreed.	- Who is going to do it? - How long will it take? - How are you going to assess a bidder's response?		
Evaluation	Value analysis required?	Do you need to validate and cross reference prices to ensure fit for purpose / increase levels of confidence internally?		
Evaluation	Negotiation.	- Sufficient time after the award of a contract to enable your legal team to assist with any contract negotiations 10-day standstill in place		

Stage:	Checklist criteria	Supporting considerations	Decision: Include / Not required / Gap	Action to take forward
Handover	Review approve and sign off tender	- Contract award - Communications to all respondents RE outcome		
Handover	Hand over contract to team managing activity	- Formal handover and completion of the procurement event - If required, reminder / prompts in place at end of contract		
Handover	Post procurement event audit required?	Can help identify areas of weakness to strengthen the process and procedures for future events (useful if numerous procurement events required to fulfil overall decarbonisation strategy)		



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