

Obtaining Quotes for Equipment or Services

Purpose

1. To ensure that purchases of equipment (including consumables) or services are obtained at the most appropriate price and specification.
2. To ensure that all costs are allowed for in the purchasing of the equipment or services.

Principles

3. There should be a clear specification agreed by the relevant committee for the equipment or service.
4. Three quotes should be obtained for any purchase of equipment or services where the total price exceeds £1000 (single or multiple purchases)
5. No expenditure may be incurred that will exceed the amount provided for in a budget without appropriate authority.
6. The relevant committee should authorise payment.

Policies which should also be referred to:

7. Financial Approvals – Levels of Authority Policy
8. Financial and Budget Policy

Specifications

9. The specification should detail “what is needed” in as much detail as possible. This will ensure that quotes can be easily compared and businesses are clear what they are quoting on.
10. The specification for a piece of equipment or a service should cover
 - a. Model; Size; Colour; Features; Number
 - b. Installation
 - c. Associated consumables
 - d. Quality
 - e. Sustainability
 - f. Delivery
 - g. Date required
 - h. Other elements as relevant
11. The specification should originate from any project proposal e.g. for improvement or refurbishment works or for an activity.
12. A specification may be built from the recommendations of a business initially consulted on a project to help advise on “what is needed”. Their recommendations though will need to be anonymised when sending to other businesses.
13. The specification should be agreed by the relevant committee.
14. The specification should be documented in a way that can be shared with any businesses and also used to validate the delivery of any equipment or service. (see Annex 1)

Quote process

15. Equipment or services that can be purchased on-line and requires no modification, professional installation or servicing e.g. a chair or a computer programme should use a desktop quote process. i.e. an on-line search of prices from reputable sources a pdf of the final “basket” and product specification at the time of checking should be kept as evidence of the quote process.
16. Where a business needs to be contacted and asked to quote then an appropriate form of words should be used – an email with the specification attached as a pdf is acceptable. (See Annex 2)

Evaluation of the quote

17. The evaluation criteria will be based upon some or all of the following (not in order of significance):
 - a. Competitive price
 - b. Price clarity
 - c. Specification
 - d. Sustainability
 - e. Service delivery experience
 - f. Quality
 - g. Availability of items or service quoted
18. The criteria should be agreed by the relevant committee.
19. The person managing the process (and obtaining the quotes) should ideally summarise the results of the quote process and make a recommendation to the relevant committee.

Amendment History

Date	Detail
September 2020	Approved by Northamptonshire F&GP sub-committee

Annex 1 Equipment / Services Specification *(pdf attachment to an email)*

Title	Description (Model / Size / Colour / Features / Number etc.)	Estimated Date Required

Response Instructions

Please supply all required information, or clearly state the reason for being unable to do so.

Any assumptions used in preparing responses should be clearly stated. Any appropriate supporting documents e.g.; brochures, should be included.

Lead times and availability is crucial to this project; please stipulate lead times in relation to order dates in your response.

Should you wish to propose a deviation from the specification or suggest alternatives please ensure that you clearly identify and highlight where appropriate in your response.

By submitting a response, you are committing to an understanding that you recognise the requirement and have sufficiently addressed all aspects of the quote and that you have checked all stated details, such as prices, to be correct and as intended.

Evaluation Criteria and Process:

The evaluation criteria will be based upon some or all of the following (not in order of significance):

1. Competitive price
2. Price clarity
3. Specification
4. Sustainability
5. Service delivery experience
6. Quality
7. Availability of items quoted

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Annex 2 **Email Template:** To send to companies to request a quote for equipment or services

Attachment: Specification as a PDF

Subject Line: Request for a Quotation – (subject)

Body of email:

We would like you to submit a quotation to supply:

(subject)

to the Sir John Lowther Centre, Rushton Road, Glendon, Kettering, Northants NN14 1QF which is the headquarters for Northamptonshire County Scouts.

OR

to Northamptonshire County Scouts

The complete requirements have been set out in the attachment.

Please provide pricing for the items / services relevant to your business, leaving out any items not within your remit.

Please acknowledge safe receipt of this email via together with your confirmation of your intention to quote within 2 working days.

Please submit your quote to (name) (email) by (date)

As part of this process Northamptonshire County Scouts makes no obligations in any way to:

- pay any vendor for any quotation; or
- select the lowest quote; or
- consider any quote submitted after the deadline; or
- any other commitment to companies whatsoever.

I look forward to receiving your response.

Regards

Name

Job Title

Email:

Phone:

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