

Welland Procurement: Procurement Planning and Delivery Toolkit



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Section 1: Pre-Procurement Approvals (WP to complete with Client, Manager to sign off)

Authority Name	(South Kesteven DC)	Procurement Title:	(Housing Repairs)
Lead Officer:	(Head of Technical Services)	WP Procurement Reference:	(SKDC-1535)
Phone Number:	(Click or tap here to enter text.)	FTS Reference	(Click or tap here to enter text.)
Lead Officer Email:	(Click or tap here to enter text.)	Date Supplier must begin work:	(01/01/2026)

Overview of the Procurement

Please tell the story or **what you are buying and why**, the aims and scope of the project, **include any historical information** needing to be considered. Are there any **risks or special considerations** eg will staff transfer from current provider, is there sensitive information involved, what about intellectual property or copyright concerns? Is this something that needs local suppliers, SME's or The Voluntary, Charity or Social Enterprise sector? Are there any timelines in terms of Funding deadlines or do we need to meet any special procurement rules? **Have you already discussed things with suppliers other than your current supplier?** Who is the project sponsor or point of escalation? **Are there any key milestone dates for approvals or decisions?**

(The scope of works will include, but is not limited to, the following:

- Responding to and rectifying various types of repair requests within SKDC Geographical area as advised in the Property List incorporated in the JCT MTC Agreement.
- Providing regular updates and reports to SKDC on completed and outstanding repairs.
- Adhering to the NHF Schedule of Rates 7.2 version with the Contractor's proposed percentage uplift. Integrating with the Council's QL software for processing incoming repair requests and subsequent real time monitoring of the repair to practical and financial completion.
- Management of Quoted works (outside Schedule of Rates) which will either be Major Repairs or Complex Repairs (Band £10k > 49k)
- The incoming Response Repair Contractor must have suitable ICT software, Processes and Systems that:
- Allows monitoring and tracking of repairs in real-time.
- Provides daily updates and data transfers to SKDC.
- Seamlessly integrates with SKDC's QL software for efficient processing of repair requests from tenants.

Project Type: (Procurement Type) I want to replace my current goods/works/service but need to change a few things

Please confirm the situation regarding funding for this procurement (Funding Status) Funding has been approved

Is approval to procure required and has this been secured: (Approval Level) Cabinet/Committee Sign Off Required (Approval Status) Approval to Procure Secured

Has legal been engaged to provide a draft contract and legal advice. (Legal engagement) Legal Engaged, Standard Template Supplied

Other Resources (if not the Lead officer)	Name	Contact (email & Phone)
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Person responsible for the Contract	<input type="text" value="Head of Technical Services"/>	<input type="text" value="Click or tap here to enter text."/>
Person Responsible for the Specification	<input type="text" value="Repairs Manager"/>	<input type="text" value="Click or tap here to enter text."/>
Person responsible for the Pricing Doc	<input type="text" value="Repairs Manager"/>	<input type="text" value="Click or tap here to enter text."/>

Procurement Details:

A. Will this require either Soft Market Engagement or Supplier input to define the scope before the tender is published? If yes provide details below	<input type="text" value="No"/>
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B. Will any staff carrying out the proposed work be transferring to the new supplier for either the current supplier(s) or from the authority? If yes provide details below including weblink to any internal policy	<input type="text" value="No"/>
<input type="text" value="Confirmed no TUPE"/>	

C. Are there any Equality and Diversity objectives in the proposed work? If yes provide details below including weblink to any internal policy	<input type="text" value="Unsure"/>
<input type="text" value="Potential requirements for adult safeguarding for service users."/>	

D. Will confidential data as defined under GDPR be transferred in the proposed work? yes provide details below including weblink to any internal policy	<input type="text" value="Unsure"/>
<input type="text" value="Some personal data of service users may be processed by service provider. To be confirmed."/>	

E. Are you looking to include Social Value, sustainability, or environmental impact outcomes as part of the proposed work? If yes provide details below including weblink to any internal policy	<input type="text" value="Yes"/>
<input type="text" value="SV is required on this contract in line with SKDC strategy"/>	

Contract Length	<input type="text" value="5 years (3+1+1)"/>	Contract Extension option	<input type="text" value="2 years in increments of 1+1"/>
Commodity Type	<input type="text" value="Works"/>	Total Contract Value	<input type="text" value="£11,000,000"/>

Approval to Start

Director Signature:

Director of:Head of Service – Technical Services..

Signature:Email confirmation received 06.03.2025.....

The relevant officer has liaised with Democratic Services and understands the decision-making implications and confirms approval to procure has been granted and has financial approval to proceed.

 Email Confirmations was received from person named left (see folder) 

[Link to return to Section 5: Project Governance \(after checking approvals\)](#)

Section 2: Procurement Planning Phase (WP to complete)

1. Design of the Procurement Process

Framework/ DPS/Dynamic Market options explored (Include details below): <input type="checkbox"/> Framework option (Yes - Not Deemed Appropriate)	
<p>« Originally viewed the EEM0056 Property Improvements frameworks but did not cover the full requirements of SKDC regarding reactive repairs.</p> <p>»</p>	
Framework Reference (if used) <input type="text"/> Click or tap here to enter text.	FTS ref for Framework (If Used/available) <input type="text"/> Click or tap here to enter text.
<input type="checkbox"/> A new framework is required to be set up	<input type="checkbox"/> A new Dynamic Market is required to be set up
Reasoning:	

Lotting Arrangements: Is the opportunity to be broken down into lots? Either provide the lot breakdown or reasons why lots are not used (below)
<p>« not lotted – it was deemed that it would not be any more competitive to split requirements further. Up to 2 suppliers can be awarded the contract.</p> <p>»</p>

Competitive Flexible: Phases Required: PHASES SELECTED FOR SINGLE STAGE OPEN PROCESS					
a) Market Engagement Event	<input type="checkbox"/>	f) Audits and Checks	<input type="checkbox"/>	k) Preferred Supplier Stage	<input type="checkbox"/>
b) Participation Stage	<input type="checkbox"/>	g) Negotiation	<input type="checkbox"/>	l) Final Tender	<input checked="" type="checkbox"/> ONLY
c) Site Visits	<input type="checkbox"/>	h) Dialogue	<input type="checkbox"/>	m) Supplier Funding	<input type="checkbox"/>
d) Supplier Presentations	<input type="checkbox"/>	i) Award Without Negotiation/Dialogue	<input type="checkbox"/>	n) Prototype development	<input type="checkbox"/>
e) Product Demonstrations	<input type="checkbox"/>	j) Intermediate Assessment to reduce field	<input type="checkbox"/>	o) Variant Tenders	<input type="checkbox"/>
				p) E-auction	<input type="checkbox"/>

How long should the tender remain valid for from date of final tender submission? (90 Days)

2. Procurement Risks /Issues Identified

Risk/Issue Description	Officer Assigned	Date Added	Severity (1-5)	Likelihood (1-5)	Score	Mitigation	Last Reviewed
Tight tender timeframes to meet Cabinet deadline	Head of Technical Services	26/03/2025	3	3	9	MR responsible for ensuring all SKDC staff adhere to timescales.	19/08/2025
Initial delays to tender timeline due to availability of tender docs	Head of Technical Services	26/03/2025	3	3	9	MR responsible for ensuring all technical documentation is available on time.	19/08/2025
Procurement process not identifying any suppliers	Welland Procurement	26/03/2025	4	2	8	CH responsible for ensuring all notices and wraparound tender documentation provided on time.	19/08/2025
Procurement process finishing on time	Welland Procurement	26/03/2025	3	2	6	CH responsible for ensuring all evaluators are trained and moderations run smoothly.	19/08/2025
Click here to return to the stage 4 report: risk implications							

3. Recommended Route to Market

Procurement Route: « Open Tender (Over Threshold) »	Reason: « Full flexibility to ensure all requirements of the authority are captured in a single stage, competitive process. »
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4. Procurement Timeline

Activity	Proposed Date(s)	Agreed Dates	Delivered Dates	If delivered late include reason
Market Engagement (UK2)	n/a	n/a	n/a	Click or tap here to enter text.
Completion Of Specification	30/04/2025	23/06/2025	23/06/2025	Click or tap here to enter text.
Draft Contract Provided	30/04/2025	23/06/2025	23/06/2025	Click or tap here to enter text.
Pricing Document Completed	30/04/2025	23/06/2025	23/06/2025	Click or tap here to enter text.
Quality Questions Completed	30/04/2025	23/06/2025	23/06/2025	Click or tap here to enter text.
Approval To Publish Competition	16/05/2025	02/07/2025	02/07/2025	Click or tap here to enter text.
Advertised on eTender System	16/05/2025	07/07/2025	07/07/2025	Click or tap here to enter text.
Tender Notice (UK4)	19/05/2025	07/07/2025	07/07/2025	Click or tap here to enter text.
Clarifications Close	16/06/2025	25/07/2025	25/07/2025	Click or tap here to enter text.
Tender Submission Date	27/06/2025	06/08/2025	06/08/2025	Click or tap here to enter text.
Evaluation Period	30/06/2025 - 11/07/2025	06/08/2025-15/08/2025	06/08/2025-15/08/2025	Click or tap here to enter text.
Moderation Session	14/07/2025	15/08/2025	15/08/2025	Click or tap here to enter text.
Recommendation Report	18/07/2025	19/08/2025	19/08/2025	Click or tap here to enter text.
Approval to Award	28/07/2025	22/08/2025	22/08/2025	Click or tap here to enter text.
Contract Award Notice (UK6)	01/08/2025	22/08/2025	22/08/2025	Click or tap here to enter text.

Standstill letters Sent	01/08/2025	22/08/2025	22/08/2025	Click or tap here to enter text.
Standstill Ends (8 working days)	13/08/2025	05/09/2025	05/09/2025	Click or tap here to enter text.
Contract Details Notice (UK7)	14/08/2025	22/09/2025	Click or tap here to enter text.	Click or tap here to enter text.
Contract Register Completed	01/09/2025	22/09/2025	Click or tap here to enter text.	Click or tap here to enter text.
Agreed Contract Start Date	01/09/2025	01/10/2025	Click or tap here to enter text.	Click or tap here to enter text.

5. MAT Criteria (most advantageous tender)

Tender Weightings			
Section Title	Section Weighting	Sub Section	Sub Section Weighting
Quality	50%	Question 1	10%
		Question 2	15%
		Question 3	15%
		Question 4	10%
		Question 5	5%
Price	40%		40%
Social Value	10%	Question 6	5%

Section 3: Approval To Publish This Procurement:

Prior to publishing any tender, the WP lead must provide the tender pack and this document to the lead officer for it to be signed off as ready to publish to suppliers.

Sign off should be from the Head of Department as a minimum.

Welland Procurement can only publish this tender once this has been signed off.

Specification Checked <input checked="" type="checkbox"/>	Pricing Document Checked <input checked="" type="checkbox"/>
Quality Questions signed off <input checked="" type="checkbox"/>	Draft Contract signed off <input checked="" type="checkbox"/>
<p>Having reviewed:</p> <ul style="list-style-type: none">• the information in section 2 of this document,• the documentation to be published to suppliers, and• having completed the above checklist, <p>I confirm permission to publish this procurement has been granted by:</p>	
Name:	HEAD OF TECHNICAL SERVICES
Signature	Approved via email (02/07/2025)
Position in Authority:	Head of Service (Technical Services)

[Link to return to Section 4: Project Governance \(after checking approvals\)](#)

Section 4: Conflict of Interest Log With Mitigations:

Name	Role in Procurement	COI identified	Date COI Identified	Mitigation used (if required)
Head of Technical Services	Evaluator	None		
Repairs Manager	Evaluator	None		
Planned Works Manager	Evaluator	None		

- Where multiple COI are identified for a single person list each on a separate line
- Roles may include evaluators, those who have designed the specification or those with influence upon the award/contract decision.

Section 5: Procurement Recommendation Report and Award

The purpose of this report is to ensure all the pertinent procedures followed for the selection of the Provider(s) to be awarded the (Housing Repairs) contract have been recorded. This is for both the provision of an audit trail, and to enable the appropriate Officer to approve the recommendation as part of the Council's internal governance and accountability arrangements.

This report is commercially sensitive (under the Freedom of Information Act 2000 with 2012 updates) and is therefore intended for restricted circulation only. The report should only be published with the consent of the Lead Officer; due to the sensitive information it contains relating to the bidder's Tender submissions.

Procurement Summary information

Project Title	(Housing Repairs)	Lead Client Officer	(Head of Technical Services)
Project ID:	(SKDC-1535)	FTS Reference	(2025/S 000-037640)
Contract length	(5 years (3+1+1))	Contract Extensions	(2 years in increments of 1+1)
Agreed Contract Start Date (based on tender return) 01/10/2025	Actual Contract Value (from supplier)	(£11,000,000)	
Commodity Type	(Works)		
Date Tenders Submitted: Error! Reference source not found.			

The Project

The contract is for the provision of:	<p>(The scope of works will include, but is not limited to, the following:</p> <ul style="list-style-type: none">• Responding to and rectifying various types of repair requests within SKDC Geographical area as advised in the Property List incorporated in the JCT MTC Agreement.• Providing regular updates and reports to SKDC on completed and outstanding repairs.
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	<ul style="list-style-type: none"> • Adhering to the NHF Schedule of Rates 7.2 version with the Contractor's proposed percentage uplift. Integrating with the Council's QL software for processing incoming repair requests and subsequent real time monitoring of the repair to practical and financial completion. • Management of Quoted works (outside Schedule of Rates) which will either be Major Repairs or Complex Repairs (Band £10k > 49k) • The incoming Response Repair Contractor must have suitable ICT software, Processes and Systems that: <ul style="list-style-type: none"> • Allows monitoring and tracking of repairs in real-time. • Provides daily updates and data transfers to SKDC. • Seamlessly integrates with SKDC's QL software for efficient processing of repair requests from tenants.
Procurement Route Used: 	<p>Reason:</p> <p> Full flexibility to ensure all requirements of the authority are captured in a single stage, competitive process. </p>

Early Market Engagement

Option 1: Market Engagement was carried out as follows

Option 2: No Soft Market Engagement was involved in this tender.

Project Governance

Click the link below to review all approvals to date for:

- Approval to Begin the procurement [Click Here](#)
- B: Approval to publish the procurement [Click Here](#)

The Public Procurement Process

In accordance with the Procurement Act 2023, the following option shown below was used:  Option A 

<p>Option A: this Tender opportunity was advertised on the Find a Tender Service (FTS) under reference (Click or tap here to enter text.) And advised that award of the contract would follow the (Open Tender (Over Threshold)) process.</p> <p>Option B: this opportunity was not advertised, as it was a call off from a Framework (Click or tap here to enter text.). The Framework itself was previously advertised on the Find a Tender Service (FTS) reference: (Click or tap here to enter text.)</p>

On publication of the opportunity, organisations were asked to register their interest via the Council’s “ProContract” e-Sourcing portal, where Tender documents were available. A total of [46] expressions of interest were received, resulting in [9] Tender submissions.

Lot Information

The procurement was:

- A. Not broken into lots (see reason Below)
- B. Broken into lots as (see Below) :

Lot Details	Bidders per lot
It was not deemed commercially competitive to break down the requirements further into lots. No competitive advantage would have been gained in doing so.	

Award Criteria

The award criteria questions considered the merit of the eligible Tenders to identify the Most Advantageous Tender (MAT) as follows.

Tender Weightings			
Section Title	Section Weighting	Sub Section	Sub Section Weighting
Quality	50%	Question 1	10%
		Question 2	15%
		Question 3	15%
		Question 4	10%
		Question 5	5%
Price	40%		40%
Social Value	10%	Question 6	5%

1. Pass/Fail

Prior to any evaluation the following pass/fail criteria were assessed:

Insurance levels for:

Employers Liability (£5 million)

Public Liability (£5 million)

Professional Indemnity (£5 million)

Provision of x2 references where you have conducted relevant previous work of similar contract value. Please provide the following as a minimum for each reference:

Name of Referee

Contact Organisation

Contract Value

Description of works on contract

Referee Contact Details

2. Quality Assessment

Each bidder's response to each question with a subjective evaluation response was evaluated and marked a maximum of 5 marks as per the below scoring matrix:

In the evaluator's reasoned opinion, the response is an:		
5	Excellent Response	The response is excellent in relation to the stated requirements of the question. The response provides an excellent level of detail and demonstrates that the bidder's expertise and approach significantly exceed the Council's minimum requirements such as to provide added value.
4	Strong Response	The response is strong in relation to the stated requirements of the question. The response provides a good level of detail and demonstrates that the bidder's expertise and approach exceeds the Council's minimum requirements.
3	Satisfactory Response	The response is satisfactory in relation to the stated requirements of the question. The response provides a satisfactory level of detail and demonstrates that the bidder has the necessary expertise to meet the Council's minimum requirements and has a reasonable understanding of what those minimum requirements are.
2	Weak Response	The response is weak in relation to the stated requirements of the question. The response provides a low level of detail and provides less than satisfactory evidence to demonstrate that the bidder has the expertise to satisfy the Council's minimum requirements and/or demonstrates some misunderstanding of those requirements.
1	Poor Response	The response is poor in relation to the stated requirements of the question. The response provides a very low level of detail. There is a significant lack of evidence to demonstrate that the bidder has the expertise to satisfy the Council's minimum requirements or really understands what those requirements are.
0	Unacceptable Response	The response is unacceptable in relation to the stated requirements of the question. The response provides no detail and fails to provide any evidence that the bidder can meet the requirements of the question. OR No answer has been given.

Bidders were advised that irrespective of the methodology described above:

1. A score below XX% for the quality assessment would result in the elimination of their Tender, as the Council requires a minimum quality threshold. **NOT USED**
2. An agreed score for any of the quality questions of '0' or '1' would result in the elimination of their Tender, as the Council requires a minimum quality threshold.

3. Commercial Assessment

The bidder with the lowest overall compliant price being awarded the full score available, The remaining bids were scored in accordance with the following calculation:

$=((\text{lowest submitted price})/(\text{potential supplier's submitted price})) \times \text{price weighting}$

Review of the Pass/Fail Criteria

The selection questionnaire responses were reviewed by Welland Procurement.

The following bidders did not pass the Pass/Fail Criteria and Welland Procurement recommended that as stated in the Tender documentation, the remainder of their Tender was therefore not evaluated:

Supplier Name	Reason for Exclusion
None	None – all suppliers passed the Pass/Fail Criteria

Evaluation of the Award Criteria

An evaluation panel was constructed to ensure that individuals assigned to evaluate questions were the most suitable and relevant to the criteria being examined, based upon qualifications and experience. Each question was evaluated by at least three evaluators and their scores, and comments recorded (see appendix B for details).

Subjective evaluation was undertaken, and initial scores to a maximum of 5 marks were awarded using the scoring matrix above.

A process of moderation for each individual evaluator's scores was undertaken by Welland Procurement. The responses were discussed at a moderation meeting held on 15th August 2025 attended by all evaluators and chaired by the moderator and a final agreed score awarded. The meeting ensured that scoring had been consistent and key points in each question had been accounted for. Average scoring was not used. In all such cases, following discussion, the moderator concluded the most appropriate mark to be awarded.

Following the moderation meeting, the following bidders were identified as failing to meet the minimum threshold (%) for the award criteria:

Abnormally Low Tender

The following outlines details of any Abnormally low bids and investigations carried out.

Supplier	Investigation and findings	Result
N/A	N/A	N/A

Bid Clarifications

The following post tender clarifications were carried out.

Supplier	Clarification	Response
N/A	N/A	N/A

Results

The evaluation scoring process was devised based upon a maximum score of 100% being available to each bidder as stated in the Tender documentation and outlined above.

Following the completion of the evaluation and moderation process the scores awarded to the participants were as follows:

Place	1st	2nd	3rd	4th	5th	6th	7th	8th	9th
Name	Foster Property Maintenance Limited	Lukeman Electrical Service Limited							
Score	80.55%	75%	73.98%	73.30%	70.28%	53.77%	0%	0%	0%

The following suppliers failed to meet the minimum quality requirements and were therefore eliminated from the procurement process:

Bidder 7

Bidder 8

Bidder 9

Risk Implications and Conflicts of Interest

As part of the tender, risks were identified as documented [Here](#) and mitigations placed as detailed.

The procurement process has been conducted in accordance with best practice and the relevant UK procurement regulations, ensuring the principles of transparency, equity and fairness have been adhered to.

The Council will use a 8 Working Day standstill period following the distribution of the notification letters (after approval has been granted).

Recommendation

Option 1: Following the completion of the procurement process, it is recommended that the following supplier(s) is/are awarded the contract.

Foster Property Maintenance Limited

Option 2: If it is recommended that an award is not made following this process, for the following reason(s)

Subcontractors

Option 1: Please note the share of the contract which the successful tenderer intends to subcontract to third parties is approximately 20%.
The main supplier's nominated subcontractors are as follows:

Option 2: No subcontractors will be used for this contract.

Next Steps

The Lead Council Officer must ensure the internal governance/approval process is followed, prior to returning this summary report to Welland Procurement.

This summary report does not supersede or replace any internal governance/approval process the Council may have.

Once the recommendation has been approved by the appropriate approvers, the preferred bidder and all unsuccessful bidders will be notified of the outcome simultaneously. Subject to the satisfactory return of due diligence, and no legal challenge being received, the Council intends to execute the Contract at the conclusion of any standstill period.

Sign Off

Procurement lead	Lead Council Officer	Chief Officer/Approver/Budget Holder
Name:	Name:	Name:
Role: Deputy Head of Welland Procurement	Role:	Role:
Signature	Signature	Signature
Date 19/08/2025	Date	Date

Section 6: Contract Management:

This section covers information and actions required after the signing of the contract for the authority assigned Contract Manager

Contract Mobilisation

Role	Name	Contact
Contract Manager (authority)		
Contract manager (supplier) Foster Property		
Contract manager (supplier) Gratton Construction		

Contract Meetings		Contract Award Notice
Has the authority contract manager set up a contract review meeting:		It is a legal requirement to publish a UK7 Contract Details Notice within 30 days of the signature of any contract valued over £20,000. Contracts over £5m must also have a redacted version of the contract attached.
At what frequency are the meetings?		Please confirm you have passed the contract start date, contract length, final contract total and a redacted contract if required to Wellandprocurement@melton.gov.uk to enable them to publish this on your behalf.
Date of email: 17 th Jan 2025		Sender details: Helen.baldwin@southkesteven.gov.uk

KPI's

The KPI's for this Contract are as follows:

KPI Ref	Title	Method of calculating	Required KPI level
1			
2			
3			

Other Legal Requirements for the Contract Manager

During the contract lifetime the following notices are required:

- Where a contract needs to be varied in terms of costs (outside of annual indexation) or scope (excluding material changes) the contract manager must arrange for the UK10 Contract Change notice to be placed on the Find a Tender System

- Where a contract needs to be extended (either via an agreed extension or otherwise) the contract manager must arrange for the UK10 Contract Change notice to be placed on the Find a Tender System
- When a contract terminates – for any reason including naturally reaching the contract end date the contract manager must arrange for the UK11 Contract Termination notice to be placed on the Find a Tender System
- Where your contract is over £5m, the contract manager must arrange for the UK9 Contract Performance Notice to be placed on the Find a Tender System at least annually (and not less than 30 days after in response to missed KPI's or a breach of contract)
- Where your contract has payments of over £30k in any quarter, the contract manager must arrange for the UK8 Contract Payment Notice to be placed on the Find a Tender System in that quarter