# **Checklist – Schools Services contracts**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Identify services required** | | |  | |
| **Estimated contract value** | | | **£** | |
|  | **Under £5,000** | **£5,000 - £100,000** | | **Over £100,000** |
| **Procurement Route** | **Direct order** | **3 written quotes** | | **5 tenders** |
| **Core Documents** | **Specific terms**  **General terms**  **Specification**  **Suppliers Proposal** | **Specific terms**  **General terms**  **Specification**  **Suppliers Proposal** | | **Specific terms**  **General terms**  **Specification**  **Suppliers Proposal** |
| **Additional Documents** | **None** | **Letter inviting quotations**  **Suppliers Quotation** | | **Invitation and Instructions for Tendering**  **Form of Tender**  **Provider’s Proposal** |
| **Optional Documents** | **Safeguarding**  **Confidentiality**  **Any other:** | **Safeguarding**  **Confidentiality**  **Any other:** | | **Safeguarding**  **Confidentiality**  **Any other:** |
| **Evaluation** | **Price represents value for money and best value** | **Price/Value evaluated using [70/30] split and quality criteria set out in the quotation documents** | | **Price/Value evaluated using [70/30] split to reflect most advantageous tender and quality criteria set out in the tender documents** |
| **Obtain internal approval for contract award\*** | **Approved by:**  **Date:** | **Approved by:**  **Date:** | | **Approved by:**  **Date:** |
| **LBS approval for award** | **Not required** | **Required** | | **Required** |
| **Finalise contract and sign\*** | **To be signed by:**  **Date of contract:** | **To be signed by:**  **Date of contract:** | | **To be signed by:**  **Date of contract:** |
| **Inform unsuccessful bidders** | **Date:** | **Date:** | | **Date:** |
| **Contracts register** | **Yes/No** | **Yes/No** | | **Yes/No** |
| **Retain for records** | **Yes/No** | **Yes/No** | | **Yes/No** |

\* **check Financial Scheme of Delegation**