# **Checklist – Schools Services contracts**

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| --- | --- |
| **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**