

Writing a brief for the procurement of goods or services

This is a template brief for the procurement of good or services. It shows you what you might want to include when looking for goods and services.

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If you have received a grant from us you must follow our procurement guidelines.

As an overview, projects with any goods, works or services worth more than £10,000 (excluding VAT), must get at least three competitive tenders/quotes. For all goods, works and services worth more than £50,000 (excluding VAT), you must provide proof of competitive tendering procedures. Your proof should be a report on the tenders you have received, together with your decision on which to accept. In cases where you will not select the lowest tender you will need to give full reasons. Depending on the nature of your project you may be required to comply with [European Procurement Rules](#) and [UK Public Procurement Regulations 2015](#).

If you are unsure about your obligations, we advise you to take professional or legal advice. If you have already procured goods, works or services for the project that are worth more than £10,000 (excluding VAT), you will need to tell us how you did it. We cannot pay your grant if you have not followed the correct procedure.

Template brief

COVER PAGE

[Title of the work you want to commission](#)

On the cover page it is useful to give a summary of the work you wish to commission and the expected timetable for delivering the work.

Organisation: Name of your group/organisation

Brief description of supply: What do you want to purchase? Specialist advice, goods or another service

Estimated value of tender: The amount you expect to spend

Estimated duration: How long do you expect the contract to last?

Name of Contact: Who will be the lead contact?

Timetable: Response deadline: insert date/time

Clarification and negotiation meetings: do you want to interview?

Confirmation of contract: when will you make a decision?

Completion of work: when do you need the work to be completed?

Main content of the brief

Overview

- Give a description of your group or organisation and what you do, including any relevant website details.
- Provide a description of the work that is being commissioned and, if you are commissioning research/evaluation or specialist advice include the aim(s) and objectives of the work and questions you would like the research/evaluation to answer (if applicable).
- Say how you plan to use the services and who the main audience for the work is.

Methodology

- If you are commissioning research/evaluation, you can either ask the suppliers to specify the methodology (including methods) they plan to use to meet the aim(s) and objectives of the work or, if you are certain about them, specify the approach you would like to be applied to do the work.
- You can also ask the supplier to propose a methodology but state that you anticipate that it will include some or all of the following principles (list the points you would like included).
- Consider issues that might affect the research/evaluation - what groups do you want to include, what would a representative sample include, ethical considerations and provide some details in relation to data collection such as what sources of information you will share, who the consultant should speak to etc.

Outputs/deliverables

Here you should list the outputs/deliverables you expect the work to generate and by when they should be completed. For example:

The following outputs will be required:

- the goods you wish to procure
- a mid-term report in word
- a final report in word
- any other reports as set out here or agreed between your organisation and the contractor
- a set of research data, to be stored in a readily accessible electronic format such as Excel

You should include here any other details about how you expect the outputs/deliverables to be completed. For example, will you expect these to follow any specific standards, how they may be presented, do you need the work to adhere to any guidelines for style or format? Do you want the successful bidder to come to discuss the work with your board or staff?

Contract management

In this section you should include information about the timetable for the work, your budget and a payment schedule. For example, wording could include:

- We expect the research/evaluation/service commissioned to begin on INSERT DATE and be completed by INSERT DATE. The final report shall be submitted to YOUR ORGANISATION NAME by INSERT DATE.
- The anticipated budget is INSERT AMOUNT to include all expenses and VAT. The contract will be let by the NAME OF YOUR ORGANISATION.
- You may wish to specify the fee, especially if you are going for a sole bidder, or ask for tenders to include a cost. Even where you are carrying out a competitive tender it is often worth giving an indication of the scale of budget that you have available. If you don't specify in the brief, the contract should specify a fee, inclusive of VAT and expenses.
- The payment schedule will be (outline payment schedule here).

The payment schedule should be based on the nature of the work and the length of the contract for example, short piece, one year and multi-year. The number of payments and the amount paid in each payment will vary depending on the work you are commissioning. It is a good idea to link payments to significant milestones, for example, x% following a meeting to begin the work and then x% on receipt of the work.

- You should include here whether there will be any special terms and conditions included within the contract.
- State who will lead on managing the contract within your group/organisation: The research/evaluation will be managed on a day to day basis for NAME OF YOUR ORGANISATION by NAME OF INDIVIDUAL.

Award criteria

In this section you should list what you expect proposals for carrying out the work to include and how you will judge which is best.

Example wording:

A proposal for undertaking the work should include:

- a detailed methodology for undertaking the study
- details of staff allocated to the project, together with experience of the contractor and staff members in carrying out similar projects. The project manager / lead contact should be identified
- the allocation of days between members of the team
- the daily charging rate of individual staff involved
- a timescale for example, in the form of a Gantt chart, for carrying out the project

- an overall cost for the work

You should also include details of how you will judge which proposal is best. You could include a set of criteria and the weighting of each scoring for making your decision. For example:

Proposals submitted will be assessed by NAME OF YOUR ORGANISATION against the following questions: (below are example questions that can be tweaked or adapted according to the project's needs and requirements. You should consider using criteria that you can judge competing bids against and are relevant to your specific tender.

1. To what extent does the proposal demonstrate an understanding of the issues related to this brief?
2. To what extent are the methodology and methods appropriate to the requirements set out in this brief?
3. What degree of experience does the bidder demonstrate in order to successfully complete the work?
4. How well has the bidder structured a team in order to successfully manage the contract and deliver the required work to the budget and timetable required?

In this section you can also add information about how bidders should detail their quotes. You can specify that costs should include VAT and expenses and include a breakdown of each person who will be working on the project, what their day rate is and how many days each member of the team will be allocated to complete the work.

Procurement process

In this section you should give an overview of the process you will go through to determine the successful bidder. You could include a timetable such as:

The procurement timetable will be:

- Proposal return deadline: INSERT DATE
- Clarification meetings: INSERT DATE. You may choose to hold interviews with shortlisted suppliers and should include the dates you intend for these to take place to ensure availability. These could take place in person or over the phone. You could also send a series of questions via email.
- NAME OF YOUR ORGANISATION will notify bidders of our procurement decision week commencing: INSERT DATE

It's also helpful to include here how you will let bidders know whether or not they have been successful, will it be via email or a phone call?

Lastly, give details of where you would like proposals to be sent, who they should be addressed to and in what format (for example email, written submission). Give a

deadline date for receiving the proposal, if you chose to receive this via email you should also include a time.

More information and resources

NCVO, How to write an evaluation brief:

<https://knowhownonprofit.org/organisation/impact/plan-your-impact-and-evaluation/writing-an-evaluation-brief#>

BIG Lottery Fund, Guide to choosing consultants:

https://www.biglotteryfund.org.uk//media/Files/Programme%20Documents/Global%20programme%20docs/guide_to_choosing_consultants.pdf

Skye and Lochalsh Council for Voluntary Organisations, Writing a tender brief:

<http://toolkit.sitekit.net/People-Management/writing-a-tender-brief.htm>