

PT1 – Options Report/Specification for goods/services or works between £50,000 & £100,000 (goods and services) / £400,000 (works)

Please complete all relevant fields.

Summary of Goods, Services or works

Description of your requirement Insert a description of what you want to buy <i>If the specification is set out in a separate document, please state 'See Attached'.</i>	Excavator with Identical Spec to JCB 3XC Compact Plus
Pricing type	Lump Sum
Technical Requirements Please refer to guidance notes	As per specification provided
Have you considered health and safety within the Technical Requirements?	Yes <input type="checkbox"/> No <input type="checkbox"/>
Gateway Approval required	Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>
Location Insert address	The City of London Cemetery and Crematorium Aldersbrook Road E12 5DQ
Details for site visit (if required) If applicable insert date and contact details for site visit	Not necessary
Has anyone external to City of London been involved in the preparation of this specification?	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
Will this project require the supplier to process personal data? Please see glossary for more information on what constitutes personal data	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/> If yes, have you completed a Data Protection Impact Assessment? Also have you included the roles and responsibilities for processing personal data within your project specification? For more information visit Designing Specifications under GDPR. A G1 (Data Processing Authorisation) form will also need to be included with the terms and conditions. Please complete and return with your PT1/2 form.

Timescales

Services/Works	Start Date: End date:
Goods	Delivery date: December 2022

Type of Purchase

Type of purchase	One-off
Budget Estimate	£85,000 - £90,000
Approved budget?	Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>

Evaluation Questions

Questions used as part of the Quality/Technical part of the quote exercise. These should relate to the requirements in your specification. Standard weighting is 60% Quality and 40% Price unless otherwise expressed.

Questions	Scoring (to add up to 100%)
Q1. Meet Specification	Q1. 15%
Q2. Supply to meet delivery date	Q2. 15%
Q3. Cost	Q3. 60%
Q4. Responsible Procurement – The Procurement Operations team can help you develop this question. It must be relevant and proportionate to what you are buying.	Q4. 10%

Identified Suppliers

If this project will require the supplier to deliver two or more hours of work for the City, we must ensure the supplier will pay London Living Wage during the quote process. This is in accordance with the updated CoL London Living Wage Policy 2018.

The London Living Wage Foundation provides a list of companies who pay living wage. You can check your nominated suppliers on their database:

<https://www.livingwage.org.uk/accredited-living-wage-employers>

Your nominated suppliers do not have to be on this list but any supplier who does not commit to paying living wage as part of the quote process will be disqualified.

Supplier Name	Reason for selection	On CBIS	Local/SME
Greenshields JCB	Used before	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Tuckwells	Used Before	<input checked="" type="checkbox"/>	<input type="checkbox"/>
SCOT JCB	Google Search	<input type="checkbox"/>	<input type="checkbox"/>
		<input type="checkbox"/>	<input type="checkbox"/>
		<input type="checkbox"/>	<input type="checkbox"/>
		<input type="checkbox"/>	<input type="checkbox"/>

Requestor Comments

Requestor	Gary Burks
Department	Environment
Comments	

Route to Market Approval

City Procurement Officer	
Route to Market Agreed	
Comments	

Process steps:

Action	Timescale	Procurement Activities	Officer Activities
City Procurement receives an approved requisition with completed specification attached.	3 working days	Allocation to buyer Validation or creation of supplier list Creation of project on CapitalESourcing Contact suppliers	Respond to Buyer queries; agree quote documentation
Request for quotation – price only	Minimum of 5 working days	Issue documents Manage queries from suppliers Provide tender summary Update officer	Respond to queries
Request for quotation – project specific questions	Minimum of 10 working days	As above	Evaluate project specific questions.
Request for quotation – non compliant response	Additional 5 working days	Manage clarification process	Support clarification process
Contract execution	Additional 5 working days	Co-ordinate signatures	
Post-tender administration	Within 3 days of completion	Convert requisition to PO Notify successful and unsuccessful suppliers Close project on capitalEourcing	
Contract published	Contract Signature	Contract details published on CoL Contract Register and Contracts Finder	Goods receipt