

Providing Services and Supports to People with an Intellectual Disability

FINANCE DIRECTORATE PROCEDURE		
TITLE: Tendering	NO.: FD004.2	REV: 5
SECTION 4: Goods and Services	PAGE: 1 of 3	
PREPARED BY: John McHugo	DATE: 04.04.2011	
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1. PURPOSE:

- 1.1 To identify the procedure to be followed in relation to tendering for goods and services to ensure that the process is carried out in an open, objective and transparent manner and achieve value for money.

2. SCOPE:

- 2.1 This procedure is applicable to Ability West.

3. RESPONSIBILITY:

- 3.1 **Board of Directors/Finance Committee** – Monitoring and implementing procedure
- 3.2 **Chief Executive** – Monitoring and implementing procedure
- 3.3 **Director of Finance** – Monitoring and implementing procedure
- 3.4 **Director of Human Resources** – Monitoring and implementing procedure
- 3.5 **Director of Client Services** - Monitoring and implementing procedure
- 3.6 **Area Services Managers** - Implementing procedure
- 3.7 **Facilities & Transport Manager** - Implementing procedure
- 3.8 **Quality Manager** - Implementing and auditing procedure
- 3.9 **Unit Director/Department Head/Manager** - Implementing procedure
- 3.10 **All Staff** - Implementing procedure.

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4. **REFERENCES:**

- 4.1 Finance Policy and Procedures
- 4.2 Accounts Procedure (General)
- 4.3 Goods and Services Procedure
- 4.4 Development/Purchase/Rental of Buildings/Property
- 4.5 Irish Legislation and Public Procurement Guidelines.

5. **DETAILS OF PROCEDURE:**

It will be necessary to obtain tenders for the following:

- 5.2.1 All transport contracts at least every two years.
- 5.2.2 Utilities not covered under National Procurement contracts.
- 5.2.3 All major construction works.

Tender documentation is drawn up with criteria for successful tender. Advertisements inviting tenders will be published in appropriate media approved in advance by the Chief Executive. The advertisement will specify where the tender documents and tender forms may be obtained and the deposit, if any, required. Where deemed appropriate, a select number of suitable suppliers may be requested to tender for a specific contract or project.

Detailed conditions for the tender will be approved by the Chief Executive.

Where it is a condition that tenders are submitted to headquarters, the tenders will be received in sealed envelopes, appropriately marked and deposited for safe keeping with the Director of Finance until the closing date of tender.

All tenders received will be opened in the presence of at least three of the following, one of which must be a Board member and one of which must be a member of the Senior Management Team:

- (A) A Board Member.
- (B) The Chief Executive.
- (B) Director of Finance or Assistant Director of Finance.
- (C) Director of Human Resources or Assistant Director of Human Resources.
- (D) Director of Client Services or an Area Services Manager.
- (E) Facilities and Transport Manager.

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5. DETAILS OF PROCEDURE (Contd.):

During the opening process, a summary of the tenders will be prepared. Subsequently, a comprehensive summary of the tenders received will be prepared for consideration by the Chief Executive, Director of Finance, Board of Directors/Finance Committee as appropriate.

When a decision has been made regarding the awarding of a contract(s), both the successful and the unsuccessful applicants will be notified in writing by the relevant Director/Manager.

In the case of construction work or a project exceeding **€100,000**, formal contracts will normally be entered into.

Where appropriate all relevant directives from the Revenue Commissioners must be complied with.

6. MONITORING OF PROCEDURE:

BY WHOM	FREQUENCY	METHOD(S)
Director of Finance	Annually following completion of external audit	Review of operation of procedure Review of any new or revised legislation or related policies Review of sample records

7. REVISION HISTORY:

REVISION	DATE	DESCRIPTION OF CHANGE	Q.A.R.F. NO.
1	22.05.1996	See Q.A.R.F. NO. 0061	061
2	09.10.1997	See Q.A.R.F. NO. 0087	087
3	27.10.2000	See Q.A.R.F. NO. 0110	110
4	19.06.2007	See Q.A.R.F. NO. 0131	131
Separate procedure for 'Tendering' in 2011 as per Version 5, previously part of 'Goods and Services Procedure with amendments to procedure as noted above.			
5	13.01.2011	See Q.A.R.F. NO. 0153	153