

Public procurement “how-to” series:

Episode 3 – The selection stage

Purpose of the selection stage

- Why are you asking the questions – what will the response demonstrate?
- Proportionate approach – not “one size fits all”.
- Look at specific contractual risks.

Financial stability - setting

- Get your finance team on board from the outset.
- Consider the contractual risk for the full lifecycle of the contract. Think about why you are setting minimum requirements (e.g. what does the minimum turnover demonstrate)?
- Consider the impact on SMEs – stress test.

Scoring

- Look at how this fits with the tender stage; are you looking for all qualifying bidders to submit tenders or do you want to shortlist the top scoring bidders?
- Ensure it is very clear what is needed to pass where you use “pass/fail” questions.
- Where you are scoring questions, use a clear matrix.

Inform bidders

- Provide reasons for your decision to any unsuccessful bidders at this stage.
- This will prevent the requirement to send a decision notice (standstill letter) to bidders rejected at this stage.
- This can also trigger the limitation period for any challenges.

Transparency

- Explain your approach to the market.
- Is it clear how responses will be scored (whether on a pass/fail basis or by awarding a score to the response)?
- For financial tests this is particularly important – could a bidder run the test itself?

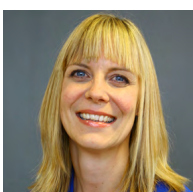
Financial stability - applying

- Stress test the tests before you launch.
- Use finance team or external experts to apply the tests and record their assessment.
- Repeat the tests in relation to the supplier during the life of the contract.

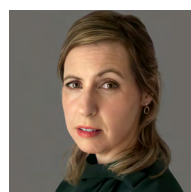
Training

- Provide training to your selection panel, as you would for the evaluation stage.
- Ensure the panel is clear about how scoring works, how to apply the matrix, etc.
- Train the panel on good record keeping.

Contact



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