



B3 Professional Advice, Contract Design and Procurement



Professional advice

Consultant appointments

- ✓ Rights and obligations
- ✓ Team members
- ✓ Scope of contract; specification
- ✓ Workplan, timetable and payment terms
- ✓ Copyright and intellectual property
- ✓ Insurance and collateral warranties
- ✓ Notice periods and rectification
- ✓ Failure to perform; fines and penalties
- ✓ Dispute resolution and termination



Employer's requirements

Provide a description of the client's requirements particularly in design and build contracts:

- ✓ Project overview and scope of services required
- ✓ Site information
- ✓ Performance specifications
- ✓ Existing design drawings
- ✓ Programme and delivery process including phasing
- ✓ Inspection, testing and handover
- ✓ Responsibility for statutory approvals
- ✓ Allocation of risk and client policies
- ✓ Approval of sub-contractors



Procurement – why?

Procurement is a process for acquiring goods, services and works:

- ✓ Identifying need
- ✓ Planning the process
- ✓ Packaging (one contract or several)
- ✓ Specifying
- ✓ Tendering – OJEU compliance and public procurement thresholds (£170k services & supplies; £4.3m works)
- ✓ Assessing and commissioning
- ✓ Contract negotiation
- ✓ Financial control
- ✓ Review and management



Procurement – why?

- ✓ The Value for Money Standard – understanding the relative costs of providing services
- ✓ Value for Money self-assessments
- ✓ Gaining an optimal combination of costs and benefits to meet your needs – not necessarily the cheapest price!
- ✓ Balancing initial spend, on-going resource requirements and social, environmental and corporate priorities
- ✓ Reducing administration and delays
- ✓ Improved planning and better risk management
- ✓ Greater potential positive impact on the local economy



Key principles

- ✓ Primary focus should be desired outputs and results
- ✓ Balance quality and cost
- ✓ Ensure that transactions are carried out in the most efficient manner to reduce costs
- ✓ Consider all options to determine the most appropriate solution
- ✓ Use competition to obtain best value
- ✓ Ensure that procurement processes follow the organisation's policies and priorities
- ✓ Comply with legislation and regulatory requirements
- ✓ Be transparent and accountable to members



Basic information requirements

A clear application process that gathers key information:

- Company details – name, parent, registered address, legal form and registration number
- Director details – name, address and other directorships
- Financial details – accounts and financial assurance
- Services and fee structure; subcontracting areas
- Commercial references
- Registration details – company, tax and qualifications
- Insurance details
- Health and safety policy
- Safeguarding checks





Accredited Advisor information

The Community Led Housing section on the CCH website contains the following useful training resources:

- Course Notes
- Course Presentations
- Case Studies
- Videos

