**Procurement Journey**

**Prepare a Brief Document**

**What is a Brief?**

The brief is a document that should be sent to suppliers when carrying out an Invitation to quote for goods or services. Your brief should explain the purpose of the item you are looking to purchase and the goal you expect to achieve. When sending out your Invitation to Quote it is imperative that both Selection Criteria and Award Criteria are included. Suppliers, however, should be made aware that Selection Criteria will be evaluated first.

**Key Objectives**

When creating a brief it may be useful to plan what you wish to gain from the procurement exercise. It is important to give the suppliers as much detail as possible as this can improve the quality of response you are likely to receive. This will ultimately improve value for money for your organisation. You may wish to consider the following points for your brief:

**Selection & Award Criteria**

You should first assess suppliers on their capability. You should include your Selection Criteria together with any weightings for each area, or any minimum standards required. If the supplier(s) meet the thresholds you identified you should then assess them on your Award Criteria.

All criteria must be relevant to the goods or services being provided.

Some examples of appropriate criteria are listed below:

|  |  |
| --- | --- |
| Selection Criteria | Award Criteria |
| Previous relevant experience | Understanding of the specific project requirements. |
| Equal Opportunities | Methodology and proposed approach |
| Health and Safety | Specific expertise proposed for the service. |
| Sustainability considerations as applicable | Proposed Delivery / Timescale |
|  | Price |

**Key Performance Indicators (KPIs)**

Key Performance Indicators can be used to ensure the goods or service being provided are at a suitable quality. These can allow you to manage the contracts effectively. It is important that the KPIs realistically reflect what the final outputs and milestones will be, examples are:

* Time targets
* Productivity indicators
* Quality of service
* Demand
* Availability

**Additional information**

Relevant additional information, as applicable to your project, may include, but is not restricted to:

* Details of EU funding or grants that apply to the project;
* Your organisation’s key contact details;
* Intellectual property (IP) rights which you wish to be retained by your organisation;
* Any sustainability issues that could impact on the contract i.e. recycled paper for reports;
* Any health & safety issues that may impact on the contract.

**Sustainability**

You should mention your organisation’s sustainability policy within the brief to ensure best practice is promoted throughout the organisation and minimise the impact on the environment.

**The Brief (to be completed and attached to the Invitation to Quote Document)**

Note: This document should be tailored to your requirements. The level of detail within the brief should adequately reflect the nature of your requirements and some of the information may not be necessary and can be omitted.

**Introduction**

The main aim and purpose of work should be indicated here. Include instructions for return of quotations; detail how the suppliers should structure their responses.

**Background**

The information provided here should be of sufficient length and detail to ensure the supplier has an understanding of why this work is being commissioned.

**Objectives**

|  |
| --- |
| **Scope of Services** |
|  |

|  |  |
| --- | --- |
| **Outputs & Milestones** | **Timescale/Due Date** |
|  | xx/xx/xxxx |
|  | Week 4 |
|  | Month 2 |
|  | xx/xx/xx |

|  |
| --- |
| **Fees and Costs** |
|  |

|  |  |
| --- | --- |
| **Selection Criteria & Award Criteria** | **Weighting (%)** |
|  |  |
|  |  |
|  |  |
|  |  |

**Key Performance Indicators**

1. *Realistic, reflective on goal & measurable*
2. *Realistic, reflective on goal & measurable*
3. *Realistic, reflective on goal & measurable*
4. *Realistic, reflective on goal & measurable*
5. *Realistic, reflective on goal & measurable*

**Sustainability Policy (if Applicable)**

Provide a short description on your sustainability policy and your expectations from the supplier.

**Additional Information**

Any relevant Additional Information you wish to add