

IronOak Homes



IRON OAK

PROCUREMENT POLICY

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Control Sheet

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Version	Date of review	Author	Note of revisions
01	July 2026	CEO	- Revised Policy - Added Objectives and Principles to the Policy - Amended the procuring thresholds - Included a procurement waiver clause

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1. Introduction

- 1.1. IronOak Homes (IronOak) recognise procurement as a key component of their business model and is at the center of delivering efficiency of their operations.
- 1.2. A Procurement Policy exists to ensure:
 - compliance with all applicable legislation
 - effective governance
 - value for money
 - protection of public funds
 - protection of residents
 - sustainable procurement
 - transparent decision making
 - effective internal controls
 - achievement of organisational objectives.
- 1.3. Procurement is seen as the acquisition of goods, services and works to meet the user's needs whilst simultaneously ensuring value for money throughout the lifetime of the works, goods or services and any possible disposals. Procurement covers development of new properties including leases, maintenance and investment in existing properties and other goods and services in the day-to-day operations.
- 1.4. This Policy covers all contracted works relating to our properties, professional services, lease, disposals, dilapidations and consultancy where funds are transacted for goods and services.
- 1.5. The policy and procedure is designed to ensure that all employees who are involved in committing to or spending money which procure works, goods and services understand the need to adhere to the policy. Compliance to this procurement policy is mandatory for all employees and shall form part of any contract with third party procurement consultants.
- 1.6. The policy is part of a suite of documents that safeguard IronOak from risk and ensure compliance with legislative and regulatory requirements. This policy links to other policies and procedures which will be identified and linked throughout this policy.
- 1.7. All procurement activity will be carried out in a fair, transparent and ethical manner and must stand up to scrutiny if challenged. All the relevant and appropriate legislative requirements detailed in the policy will be observed.

2. Objectives

- 2.1. The main objectives of this Procurement Policy is the following:
 - Deliver value for money.
 - Obtain safe, high-quality goods, works and services.
 - Ensure fair competition.

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- Maintain transparency.
- Support resident outcomes.
- Protect the organisation from fraud.
- Ensure procurement decisions are proportionate to risk.
- Support environmental sustainability.
- Promote continuous improvement.
- Support delivery of the Corporate Plan.

2.2. The Procurement Policy must also align and compliment certain legislation and the Regulatory Standards, these include:

- Governance and Financial Viability Standard
- Safety and Quality Standard
- Transparency, Influence and Accountability Standard
- Value for Money expectations
- Health and Safety legislation
- Bribery Act
- Modern Slavery Act
- Equality Act
- Procurement Act 2023
- Data Protection legislation
- Building Safety legislation where applicable.

3. Procurement Principles

3.1. Procurement is built on a foundation of principles, these help navigate contract develop, award, review, and negotiation. IronOak wishes to use the following to underpin and define decision making, and when to complete or retract from a contract. These principles show be demonstrated through our contracts and be evidence to show compliance.

- Value for Money
- Fair Competition
- Transparency
- Integrity
- Accountability
- Proportionality
- Sustainability
- Resident Focus
- Innovation
- Risk Management.

4. Roles & Responsibilities

4.1. Board

- Responsible for approval of this policy and monitors contracts through risk management and receives annual procurement assurance,

4.2. Audit & Risk Committee

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- Receives and reviews procurement assurance for adequate oversight and reviews internal audit findings and fraud risks relating to procurement and contract management
- 4.3. Executive Leadership Team
- Ensures budgets exist, reviews procurement and supplier performance and approves contracts as per this policy
- 4.4. Department Leads
- Responsible for overseeing their procurement programme and provide approvals, support, advice, and compliance to others.
- 4.5. Procuring Officer
- Responsible for procuring the goods, services and works in accordance with this policy. Interaction with suppliers to ensure the delivery of goods, services and works are managed, performance is monitored, contracts are approved, and obligations are fulfilled.

5. Procurement Process

- 5.1. IronOak, where applicable follow a four-stage procurement process. The following table sets out the required activity at each stage to ensure IronOak procure goods, services and works in a fully compliant manner, where the value exceeds £25,000.01

Stage	Activity
Define	The Procuring Officer should identify the procurement need and hold an initial evaluation meeting with relevant personnel to determine the key requirements of the procurement. A business case should be put together detailing the defined outcomes and include the potential route to market.
Procure	The Procuring Officer will procure goods, services or works as per the 'Route to market' (section 4). The department lead will assist where necessary with the process and ensure compliance with this policy throughout. Guidance can be provided from the finance department in evaluation & tender analysis meetings and liaise with the data protection team, where personal data may be stored and incorporated into the procurement. A procurement summary detailing contract length, value and scope must be provided to the decision maker to seek approval from the relevant person as detailed in section 5.

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	Following approval, contract terms and conditions must be reviewed by all relevant and necessary departments. ie; finance, data protection. Contracts must be reviewed and signed by those with delegation under the decision-making schedule (section 5).
Manage	Each contract will be administered by the procuring lead following approval who will be responsible for monitoring the contract. The procuring lead will report their observations on a regular basis to the required department lead and executive team.
Re-Procure	The department lead will maintain a contracts tracker they will notify all stakeholders of the expiry in sufficient time for re-procurement or contract extensions.

6. Route to Market

6.1. Competitive procurement to provide value for money is a key objective for IronOak. Framework agreements are a proven and preferred method, however as IronOak operate within a diverse and complex housing sector, and across a large geographical area, all procurement methods can be considered. Below provides a summary of the procurement methods available and table 1 identifies the required thresholds and route to market that should be followed.

6.2. Procurement Route

There are several forms of procurement that IronOak can adopt, below is a selection of approved routes available, however alternative routes may be acceptable depending on the requirements of IronOak and current legislation.

- Open tendering
- Selective tendering
- Framework Agreements
- Request for quote
- Single Source
- Two stage tendering

6.3. There will be circumstances which require IronOak to procure goods, services or works via another method not detailed within this section. In such circumstances, IronOak can, under the strict authorisation of the CEO submit a procurement waiver to utilise other procurement options as permitted under the Procurement Act 2023 (PA23). All waivers will be submitted to ARC and reported to Board.

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6.4. Waivers should only be allowed:

- In an emergency where no action would cause harm or significant disruption
- Where there is technical exclusivity
- When a Framework requirement dictates this decision
- When there is or reason to believe there will be market failure
- To continue with an existing service that demonstrates value for money and change would affect resident or organization outcomes
- Where there is a legal requirement.

6.5. The Procuring Officer must prepare a case file setting out the reasons why an alternative procuring route against policy was used, ensuring sufficient supporting evidence was presented to the CEO for authorisation. All such approved authorisations will be reported to the ARC and notified to the board at their next meeting.

responsible for monitoring and reviewing the operation of this policy and making recommendations for change to minimise risks.

6.6. This procedure should not be used to avoid competition or for administrative convenience but in emergencies or where not taking the correct route would have a detrimental effect on IronOak, and their customers.

6.7. The statutory thresholds are now the following (inclusive of vat):

- Goods and ordinary services = £207,720
- Works contracts = £5,193,000
- Light touch services = £663,540
- Concession works = £5,193,000

Thresholds and route to market (Table 1)

Contract Value (Including Vat)	Procurement route	Process	Required documentation
£0.01 to £1,000.00	Single source Request for quote	Market checking to demonstrate value for money. Follow expense Policy and Purchase & Work Order process.	Quote (<i>where applicable</i>). Invoice or receipt.

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£1,000.01 - £10,000.00	Request for quote <i>(All except single source)</i>	Provide written scoping document. Two written quotations requested to demonstrate value for money. Follow Purchase Order and Work Order process.	At least one written quotation obtained. Invoice or receipt. Completed written scope.
£10,000.01 - £100,000.00	Request for quote <i>(All except single source)</i>	Provide written scoping document. Three written quotations requested to demonstrate value for money. Follow Purchase Order and Work Order process.	At least two written quotations obtained. Invoice or receipt. Completed written scope.
£100,000.01 to £207,720.00	Open tendering Selective tendering Framework agreements	Provide detailed written scoping & technical document. Three detailed written quotations requested. Complete PQQ and/or ITT documentation where necessary. Follow Purchase Order and Work Order process.	Completed procurement scoping & technical document. Signed contract and terms & conditions. At least two detailed written quotations obtained and filed Completed PQQ and/or ITT where required. Procurement evaluation summary. https://www.gov.uk/contracts-finder https://www.legislation.gov.uk/ukssi/2015/102/contents/made

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£207,720.01 to PA23 Thresholds	Open tendering Selective tendering Framework agreements Two stage tendering	Provide detailed written scoping & technical document. Complete PQQ and/or ITT documentation where necessary. Follow Purchase Order and Work Order process.	Completed procurement scoping & technical document. Signed contract and terms & conditions. Completed PQQ and/or ITT. Procurement evaluation summary. https://www.gov.uk/contracts-finderhttps://www.legislation.gov.uk/ukSI/2015/102/contents/made
Above PA23 Threshold	Framework agreement Open tendering Two stage tendering	Advertised on 'Find a Tender Service' within prescribed time limits, including notice of award. 'E-Tendering' system must be used for open competition. Provide detailed written scoping & technical document. Complete PQQ and ITT documentation where necessary. Complete Purchase Order and Work Order Process in line with contract obligations	Completed procurement scoping & technical document. Signed contract and terms & conditions. Completed PQQ and/or ITT. Procurement evaluation summary.

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7. Decision Making

7.1. Decision schedule (Table 2)

Procuring Lead	Delegated Responsibility	Contract Value (Inc VAT)
Procuring Officer	To approve the award of all purchases up to and below £500.00	£0.01 to £1000.00
Procuring Officer	To procure the award of all contracts/purchases up to and below £1,000.00 per contract with the approval of their line manager	£1,000.01 to £5,000.00
Procuring Officer	The procuring officer to complete tender of all contracts/purchases between £5,000.01 to £50,000.00 with the approval of the Department Lead and an ELT member.	£5,000.01 - £50,000.00
Department Lead	The procuring officer to complete tender of all contracts/purchases between £50,000.01 to £100,000.00 with the approval of two ELT members	£50,000.01 - £100,000.00
Department lead	The procuring officer to complete tender of all contracts/purchases between £50,000.01 to £100,000.00 with the approval of an ELT member and the CEO	£100,000.01 to £207,720.00

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ELT Member	The procuring officer to complete tender of all contracts/purchases above £207,720.01 with recommendation from the CEO and approval from the ARC and notification to the board.	£207,720.001 and above
CEO and ELT Member	To oversee and approve all procurement contracts above the PA23 threshold of £207,720.01 with approval from the ARC and notification to the board.	Above PA23 Thresholds

- 7.2. All contracts valued above £50,000.01 must be signed by a member of ELT. Contracts above £100,000.01 must be signed by the CEO and a member of the ARC.

8. Procurement Procedure

- 8.1. IronOak procure goods, services and works daily, all procurement whether already completed, in progress or pending, must be identified by the department.
- 8.2. Any Procuring Officer wishing to start a new procurement above £5,000.01 (*this may still be necessary if a complex procurement is below this threshold*) must inform their department lead of the requirements using a procurement notification form (*appendix 1*), the information required will include but not be limited to; potential contract value, contract length and category of service for which the procurement falls.
- 8.3. Once the department lead has been informed of the pending requirement, they will issue the Procuring Officer authorisation to proceed and add this to the procurement notification form. The Procuring Officer will start preparing the written scope & technical documents (*where applicable*), identify the procurement route and complete any formal documentation prior to sending them to potential suppliers.
- 8.4. The Procuring Officer is responsible for completing a procurement specification, it can take the form of a single document outlining the key procurement objectives or a detailed appraisal that provides in-depth requirements. It is the single most important document in the tender process and in the subsequent contract, defining exactly what the service provider has agreed to provide and the price being paid. It is also an opportunity to make improvements to the service being delivered, how the service will be measured and what can and cannot be changed. The specification document will be used to determine the risk vs benefit of the procurement and assist in the evaluation of the value for money savings.

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- 8.5. The specification can form part of the contract documents and requires robust scrutiny to ensure there is no conflicting information.
- 8.6. The contents will vary dependent on the nature of the procurement e.g. goods, services or works. This guidance is not prescriptive and should be used as guidance in identifying key requirements and should be proportionate to the size, complexity, and value of the contract.
- 8.7. Things to consider:**
- What are you attempting to achieve?
 - Investigate the relevant supply market and research any recent and anticipated innovations
 - How do the current arrangements meet existing requirements and allow for future changes?
 - Information requirements
 - Technology interfaces
 - Social value and sustainability
 - Constraints such as timescales, budget, technology, regulation
 - Performance indicators and how these will be measured
 - Priorities of the procurement outcome
 - Define what is mandatory and desirable requirements to assist with excluding elements which add more cost than value
- 8.8. The Procuring Officer will update the department lead at regular intervals (*depending on the procurement 'route to market'*), when the status moves to 'in progress'. All documentation, evaluations and awards will be held centrally by the department lead with advice from the DPO.
- 8.9. IronOak may seek or accept advice from independent experts or potential suppliers and may use this advice in the planning and conduct of the procurement process. To safeguard itself in this process IronOak will make no commitment to any supplier that engages or distort competition by being biased to a supplier or solution in the design of any specification.
- 8.10. Early supplier involvement and market testing is a positive method of researching what is new and to ensure specifications and technical documents are robust. Before commencing a procurement procedure, IronOak may conduct market consultations with a view to preparing the procurement and informing potential suppliers of their procurement plans and requirements.
- 8.11. Where parties have supported in the early design and scope, IronOak will be transparent and communicate to other tenderers any relevant information exchanged in the context of or resulting from the involvement of the tenderer in the preparation of the procurement specification. Where there has been early supplier involvement this shall be reported in line with the PA23.

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- 8.12. IronOak may adopt the use of a Pre-Qualification Questionnaire (PQQ) (*appendix 2*) to suppliers at any time before or during the early stages of a tender, the PQQ template can be amended according to the procurement however this selection process can ensure a faster evaluation process of potential suppliers. PQQ's will be issued using a basic expression of interest form. An Invitation to Tender (ITT) (*appendix 3*) may follow a PQQ if it is requested prior to a tender being advertised.
- 8.13. All high value procurements above the PA23 threshold will be advertised on [Find a Tender](#) and managed through an 'E Tendering' system.

9. Procurement Register

- 9.1. The procurement register is a perpetual catalogue of all procurements that are 'pending', in progress' or completed' within IronOak. The register provides visibility to all staff of a procurement status, start & end dates and the procuring officer, allowing new procurements to be added when the business identifies a requirement. The plan should be aligned to the contract register which is managed by individual department leads.
- 9.2. The procurement register will be managed by department leads and monitored by the Executive team on a quarterly basis and presented to the Board and Audit & Risk Committee. The plan will undergo a full annual review and may be subject to external audit.
- 9.3. The department leads will report on the progress of all procurement within their department to the Executive team on a quarterly basis and in turn report to the Audit and Risk committee and Board quarterly.
- 9.4. A procurement report will include the stage in the process all procurements are at, compliance to internal procedures, estimated go-live date, RAG rating (*If required*), financial implications, and summary of the procurement to date.
- 9.5. The finance department will provide management accounts to the Executive team with the following reports on a quarterly basis, identifying any follow-up actions and responsibilities:
- 9.5.1. PO/WO date against invoice date
 - 9.5.2. PO/WO date against supplier set-up date
 - 9.5.3. Suppliers not used in the last 16 months

10. Evaluation & Award

- 10.1. Optimum contract award decisions resulting from effective bid evaluations are fundamental to achieving value for money. All bids and tenders should be evaluated carefully against the award criteria and weighting set out in the documentation made available to all bidders. Depending on the 'route to market' the procurement

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evaluation may adopt a basic unbiased approach of the below or follow a more detailed process.

10.2. IronOak has adapted a three-way weighting on all procurement.

10.3. **Quality, Cost and Time** are three important objectives to achieve a well-rounded impartial selection process. Ideally these will be of equal importance, however every procurement is different, and so the procuring officer must set out the agreed weightings for each procurement prior to the release of the tender documents.

10.4. Every procurement evaluation will be scored out of 100. Depending on the weightings the scoring will be spread across the three objectives.

10.5. The Evaluation Panel (*where applicable selected by the Procuring Officer*) will evaluate bids and keep careful records of the decision-making process. Documented bid evaluations reduce risks of legal challenge and reputation damage by being demonstrable to the bidders that an effective, transparent and non-discriminatory process was rigorously followed.

10.6. In accordance with IronOak's duties under the Bribery Act 2010, evaluation panels should consist of a minimum of two members. Panel members must have no real or apparent conflicts of interest relating to the quotes / tenders being evaluated including: a financial interest in a company under consideration; or a personal interest, including partner, relative or friend working at a company under consideration. IronOak's declaration of interest form (*appendix 4*) must be completed in the event of any member of staff having any conflict of interest in relation to a procurement exercise.

10.7. Following a procurement process and prior to final approval, the procuring officer is responsible for completing a Value for Money (VfM) savings form (*appendix 5*), using their experience they will assess the savings that have been made and submit this to the approver for final consideration (*this can be delegated to an independent member of ELT*).

10.8. The decision maker (*section 5*) must authorise the award before formal documentation can be processed and communication with bidders is completed.

10.9. **Quality**

10.9.1. The prospective supplier will be required to support their tender with evidence on how they propose to deliver the below criteria. The evaluation panel have the responsibility to analysis all tenders and decide the appropriate score using their individual & collective knowledge, experience, as well as the evidence that is supplied.

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Quality Criteria	% Weighting
Resident/ Customer Service	40
Service Delivery	30
Contract Management	20
Staff Management	10

10.10. Cost

10.10.1. IronOak will use a simple but effective scoring system to determine a fair and competitive selection (*example below*). Although the lowest cost does not always mean the best tender, it does assist in providing VfM when evaluated against the other objectives along with the detailed scope and technical document.

10.10.2. The lowest will bidder will receive 100% of the score and the highest will receive 50% of the score, the rest will be calculated accordingly.

Bidder	Bidder Price	Price Score %
A	£102,500	62.5
B	£95,000	75
C	£80,000	100
D	£110,000	50

10.11. Time

10.11.1. When deciding on the initial procurement weightings Time can be prioritised for many reasons. Time to; implement a product, respond to a request, communicate specific information or complete a task, can be challenges for IronOak and its customers. Analysis of this tender will depend on how this objective is evaluated and scored, the evaluating panel, using their collective knowledge and experience will determine a ranged score of 50% of the marks for the worst and 100% for the best response based on evidence the supplier provides on questions the Procuring Officer asks.

10.11.2. Awarding contracts - Bidders will be notified of a contract award in writing prior to contract signing by either the decision maker, department lead or Procuring Officer. Unsuccessful bidders will be advised in writing by the Procuring Officer and provided with an appropriate debrief.

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11. Other Matters

- 11.1. Accreditations - For the avoidance of doubt, all contractors (*within property management*) wishing to tender with IronOak must be assessed within aSSIP scheme.
- 11.2. Contracts - Terms and Conditions will be released with the tender documents where applicable or available on request.
- 11.3. Our property department will use (*where necessary*) the most up-to-date versions of the following industry-standard contracts:
 - JCT with Contractor's Design
 - Immediate Form of Contract
 - Minor Building Works
 - Customised
- 11.4. Equality and Diversity - The Equality Act 2010 requires IronOak to eliminate discrimination and to promote equality. This duty cannot be transferred to external suppliers, but IronOak will consider its responsibilities and where appropriate seek to include relevant contractual provisions into contracts with suppliers.
- 11.5. Consideration of equality issues may be included within the initial triage meeting, this ensures that equality and diversity is considered when developing specifications, sourcing suppliers, preparing pre-qualifications, inviting bids, developing performance indicators and drafting contracts.
- 11.6. Modern Slavery - IronOak follows best practice guidance in ensuring suppliers understand the risk of modern slavery in supplier chains and take appropriate action to identify and address those risks. All procurements may include a risk assessment of modern slavery with any medium or high risk rated procurement including modern slavery specification, award criteria, and contract management actions.
- 11.7. Freedom of information (FOI) - All procurement documentation may have to be supplied to anyone making a freedom of information request under the Freedom of Information Act 2000 request.

12. Related Policies

- Contract Management Policy
- Audit & Assurance Policy
- Risk Management Framework
- Financial Regulations
- Repairs & Maintenance Policy

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13. Appendices

1. The Procurement Notification Form
2. PQQ Template
3. ITT Template
4. Conflict of Interest Declaration Form
5. VFM Savings Approval Form

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Appendix 1

Procurement Notification Form

This form should be used to inform the department lead of a procurement that will exceed £25,000.00 (*this form can still be used during a complex procurement below this threshold*). To be completed by the procuring officer and submitted accordingly.

Notification Date:	
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Procuring Officer:	
Procuring Department:	
Procuring Category:	

Estimated Contract Length:	
Estimated Contract Value:	
Estimated Procurement Start Date:	
Estimated Procurement End Date:	

Approved to proceed by:	
Approved to proceed date:	

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PQQ

Pre-Qualification Questionnaire

Organisation Details

Organisation Name:	
Legal Status / Form of Ownership:	
Registration Number:	
Registration Date:	
Date established:	
Registered office address:	
Website:	
Holding company / Organisations:	

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Subsidiary / Linked Organisations:	
Parent company name and registration number:	

Is your organisation VAT registered?
If yes VAT Number:

Yes / No (delete as appropriate)

Contact Details

Main contact Name:	
Position:	
Contact phone numbers:	
Contact email addresses:	
Office base address:	

Company Contract Eligibility

Have any of the company directors, proprietors, partners or associates been involved in any companies which may be ineligible for participating in a contract for any of the following reasons:

Bankruptcy	Yes / No
Insolvency	Yes / No

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Subject of winding up order	Yes / No
Conviction for a business related offence	Yes / No
Committing an act of grave misconduct in business	Yes / No
Serious misrepresentation of business in respect of eligibility, economic and financial standing, technical capacity of organisation	Yes / No
Failure to fulfil business financial obligations – such as tax	Yes / No
Conviction due to offences under Public Contract Regulations	Yes / No
	Yes / No

If you have answered yes to any of the above please provide additional details:

Company Activity

Please state your core business activities:

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Geographical Coverage

Please state geographical locations where work can be carried out as:

Staff

Please state number of employees:

Directors	
Managers	

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Other staff: please list job titles and staff numbers as appropriate

Please list details of any sub-contractors and how they are managed:

Health and Safety

Is your organisation registered with CHAS?

Yes/No

If yes please provide a copy of your CHAS certificate

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Does your organisation have a Health and Safety Policy	Yes / No
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If yes please provide a copy of your H & S policy

Please provide details of your organisations competent person in respect of health and safety:

Contact Name:	
Position:	
Contact phone numbers:	
Contact email address:	
Office base address:	
Relevant qualifications:	

Has your organisation had any major accident fatalities under RIDDOR in the past 5 years?	Yes / No
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If yes please give details including HSE involvement and any action taken:

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Has your organisation ever been prosecuted or served notices by the HSE	Yes / No
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If yes please give full details:

Environmental Matters

Please provide a copy of your organisations environmental policy if you have one. If not, please outline your company ethos in terms of environmental matters:

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Has your organisation ever been prosecuted for breaking any environmental laws	Yes / No
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If yes please provide full details:

Organisation Experience

Please provide details of your past 5 contracts, relevant to this procurement exercise:

Client Name	Job Type	Procurement Type	Job Value	Location	Client contact details

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Please provide further details below of your organisations experience which you feel are relevant:

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Financial Matters

Please provide details below of your annual turnover for the past 3 years:

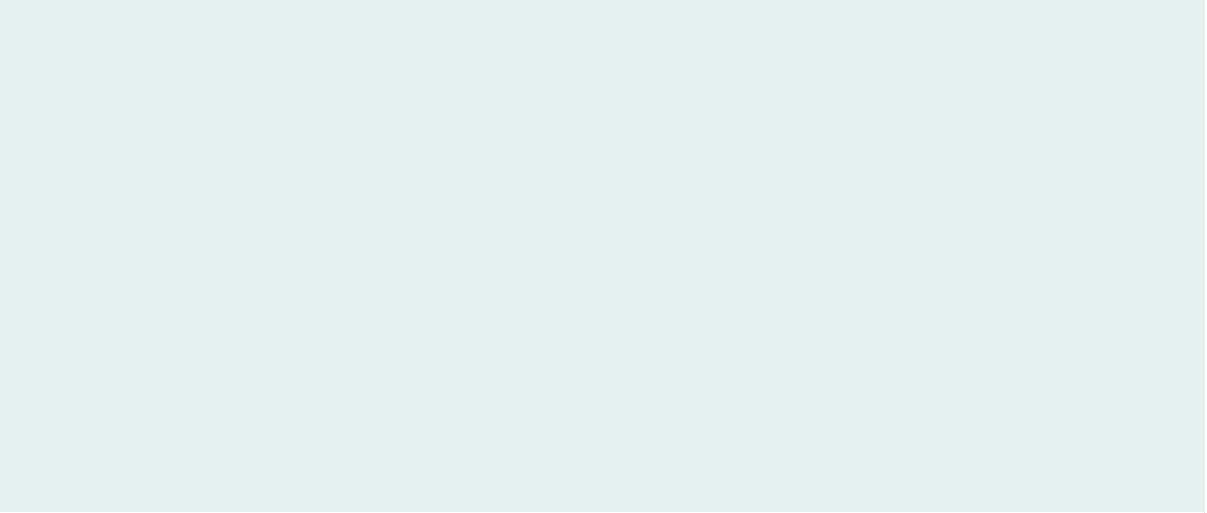
Financial Year	Annual Turnover

Insurance

Please provide details of all your organisation insurances (such as public liability, employers liability, contractor all risk, professional indemnity, product liability etc) and provide certificates for all:

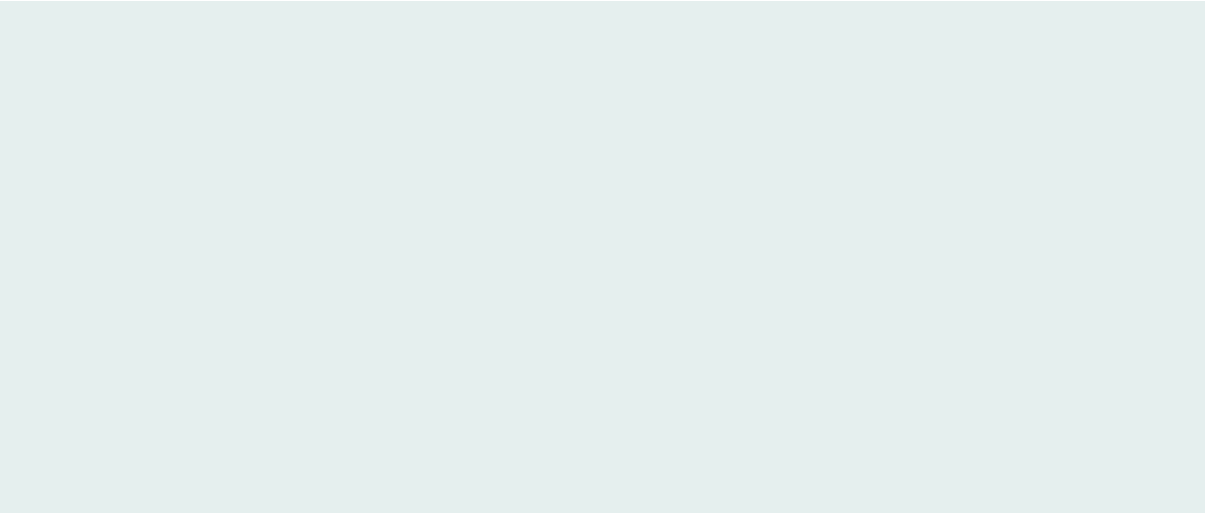
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Organisation Registrations / Accreditations / Licenses

Please provide all details of any company registrations, accreditations or licenses:



Quality Assurance

Please provide full details of your organisations quality management system and please provide all relevant policies and procedures and include your corporate responsibility policy:

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GDPR

Please provide your organisation GDPR policy

Safeguarding

Please provide your organisation Safeguarding policy

Customer Engagement

Please list details and provide case studies of your past customer engagement and particularly for specialised supported housing customers if your organisation has that experience:

Equality and Diversity

Please provide a copy of your equality and diversity policy or set out your organisational approach to equality and diversity below should you not have a policy:

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Please provide details of your organisations Modern Slavery Statement:

Has your organisation been subject to any formal investigations on the grounds of alleged unlawful discrimination

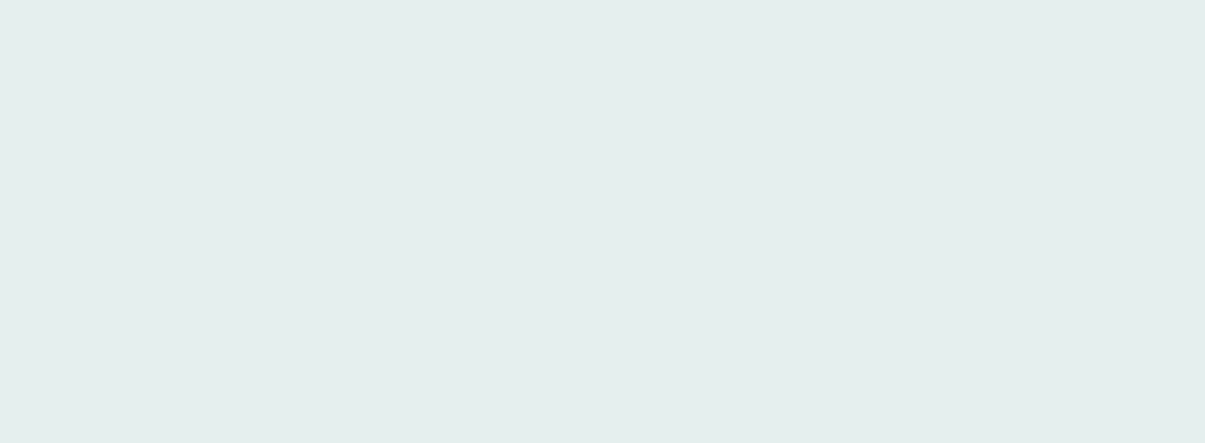
Yes / No

If yes please give full details:

Further Information

Please provide any further information below that you feel is relevant:

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Declaration and Signature

This form should be signed by a senior member of your organisation who has the authority to commit the organisation to the value of this contract.

Name:

Signed:
Date:

Position:

Thank you for completing this PQQ. Please check that you have answered all sections fully and attached all required documentation.

Please return to:

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Appendix 3

ITT

Invitation to Tender

To include:

- **Introduction to IronOak**
- **Purpose of ITT**
- **Terms of Agreement and commencement**
- **Instructions for Tenderers**
- **Tender process Timetable**
- **Evaluation approach and shortlisting process**
- **Specification of Requirements**
- **General Notices**
- **Complaints about Procurement Process**

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Appendix 4

Conflict of interest – Declaration form

IronOak

Conflict of Interest Declaration Form

This form should be completed annually, also at any time when a new matter to be declared arises. Any fields that do not apply should be left blank. Completed forms should be given to the Company Secretary and will be recorded as appropriate in IronOak Limited's register of interests, or the register of gifts and hospitality.

Your Details

Your Name	
Your Position with IronOak	

Declaration of Compliance

I declare that I have read and understood IronOak' Code of Conduct and agree to comply in full with it. In accordance with the Code, I make below a full declaration of all interests which may, or be perceived to, conflict with my position with the association.

Details of Declaration

Please give details of whom this declaration concerns – you a family member, friend or other person.	
Describe the actual or potential conflict of interest, stating for instance whether it relates to: 1. An employment 2. A business matter 3. A company dictatorship 4. Land or property 5. A tenancy or leasehold matter 6. Membership of an organisation society 7. A position of public responsibility	
Give further details of any firm, business, agency, society or other organisation involved.	
Give details of any payment, benefit, transaction, contract, property, land, that is involved (with details such as date, location and sums involved)	
Give details of any gift or hospitality that is involved (with details such as date, location and estimated value)	
Give details of any job applicant or other employment matter that is involved	

Give details of any tenancy or leasehold matter, application for housing etc that is involved.	
Please add any further details about the matter you are declaring	
Is there any reason why this declaration should not be placed on IronOak' register? Please give details.	

Name	
Signed (for and on behalf of IronOak)	
Position	
Date	

Appendix 5
VFM – Savings Approval Form

Value for money 3 E's

Referring to the original scoping document list the Vfm efficiencies identified?

Included in tender Y/N, provide reason if N

Review the tender documents, and any interview notes, and list any

Using the definitions below provide Vfm savings for each of the elements identified

Excellence ➤ Safety ➤ Sustainability ➤ Integrity

VFM Efficiencies agreed through the process	
VFM Efficiency	
Economy	Minimise resources to save cost, time, effort whilst maintaining or improving quality
Efficiency	Improving the balance between performance outcomes and service inputs
Effectiveness	Delivering services which achieve desired outcomes, meet customer needs, and learn from both the intended and actual impacts on the business

Excellence ➤ Safety ➤ Sustainability ➤ Integrity

Authorisation			
	Name	Signature	Date
Procuring Officer verified and approved			
Department lead verified and approved			

DRAFT

Excellence ➤ Safety ➤ Sustainability ➤ Integrity