

CIPFA Procurement Event

Providing Reassurance - Designing your Competitive Flexible Procedure and Assessment Summary

Zoom Event

15 July 2025

Purpose

This event has been developed to support contracting authorities design or obtain assurance that their competitive flexible procedure is Procurement Act 2023 compliant. Contracting authorities have been used to following process driven procurement procedures under the Public Contracts Regulations 2015, however the Procurement Act 2023 now offers contracting authorities an opportunity to design their own procurement process. This will give contracting authorities greater flexibilities to design procedures that meet their specific contract requirements. The catch however is that organisations will have to operate within the overarching principles and objectives under the Procurement Act 2023. In addition, the procurement procedure will have to be clearly documented and linked to the wide-ranging transparency obligations in the legislation to create certainty for all parties and avoid legal challenges.

To avoid getting caught out and having your procurements delayed or abandoned, this event has been scheduled to support practitioners. It will focus on the competitive flexible procedure and provide support and offer guidance to draft complaint documents.

Learning Outcomes

Key learning outcomes include: -

- Practical explanation of how CAs can make the most of the new flexibilities and freedoms.
- Detail the scope and parameters to design your own procedure under the PA23.
- Understand how the principles and objectives will apply to the procedure.
- Update on refinements to the old favourites – restricted procedure and LTR.
- Clarification on the level of engagement and negotiations allowed with suppliers.
- Importance of having clear and documented processes to avoid disputes.
- Why it is essential to create guidance notes to provide clarity for staff and suppliers.

Who Will Benefit?

The event will support heads of procurement, senior finance, procurement lawyers, project managers, senior auditors and contract managers with strategic responsibility of the procurement function. It will also benefit other practitioners who are responsible for delivering better procurement outcomes and innovative service delivery.

Programme

09.10– 09.15	Join the Webinar now
09.15 – 09.25	Welcome, Introductions and Overview of the Event Mohamed Hans, Manager CIPFA Procurement & Commissioning Network
09.25 – 10.55	Procuring in the Future - Faster, Fairer and Effective? This session will set the scene and start to explore the detail of what to include in the competitive flexible procedure: <ul style="list-style-type: none">▪ Overview of PA23 changes to the procedures▪ What is a tender and why do we need it?▪ What must it include and what are the nice to haves?▪ How a CFP could be structured▪ Implied terms▪ Conflicts assessment▪ What to discuss during preliminary market engagement?▪ Setting out your draft KPI's during early engagement▪ Technical specifications
10.55 – 11.10	Comfort Break
11.10 - 12.30	Competitive Flexible Procedure – Blank sheet of paper or more of what we did before? This session will set the scene and explain the key rules governing the operation of the new CFP. The session will cover: <ul style="list-style-type: none">▪ Tender notice▪ Background information▪ Submission rules and procedural requirements▪ PSQ – designing conditions of participation▪ Associated persons, connected persons and subcontractors▪ Exclusion Grounds▪ Use of lots and providing reasons/ conditions in the Tender Notice.▪ Including option to have multiple tender stages▪ Negotiation and dialogue▪ Where does innovation fit in?▪ Modifying the procedure
12.30 – 13.10	Lunch Break
13.10 – 14.00	Putting Details into the Competitive Flexible Procedure This session will provide details on what information is required to describe your process. <ul style="list-style-type: none">▪ Setting the Award Criteria - MAT▪ Designing your Assessment Methodology▪ Compiling the Associated Procurement Documents▪ Tender response documents▪ Tender certificates
14.00 – 14.30	What is an 'Assessment Summary' and when must they be provided? This session will support you draft your Assessment summary template: <ul style="list-style-type: none">▪ Content of assessment summary for successful/ unsuccessful supplier▪ Required assessment information under frameworks▪ Redacting sensitive information
14.30 – 14.40	Discussion, Questions, Next Steps & Close

CIPFA Sustainability Policy

CIPFA is delivering all of our training courses, workshops and seminars in accordance with our sustainability strategy. We do not provide hardcopy course materials to delegates and these are now distributed by email in advance of the event. We are striving to reduce our carbon footprint in every way that we can, and we hope that we can count on your support.