

CIPFA Procurement Webinar

Moving forward under PA23 - Drafting your Invitation to Tender for a Competitive Flexible Procedure

Part of the New Procurement Act 2023 Support - Are you ready?

Event dates:

17th September 2024 – Zoom
3rd October 2024 – London (Subject to delegate demand)
7th October 2024 – Zoom
10th October 2024 (Subject to delegate demand)

Purpose

CIPFA Procurement Network invites you to attend this new event that will support practitioners who are responsible for designing procurements and drafting the Associated Tender Documents under the new obligations of the Procurement Act 2023 (“PA23”).

PA23 and the supporting Regulations introduce a plethora of new rules and practices whilst also deleting some long-relied ones, which practitioners will need to get to grips with before October 2024. This event will offer delegates detailed and practical explanation of what they need to consider and include in their ITTs under the PA23. If you do not update your current ITT, it will potentially prejudice new procurements after 28th October.

Learning Outcomes

How will you benefit?

Key learning outcomes include:-

- Explanation of terminology and procedural changes introduced by the PA23.
- Balancing transparency, proportionality, and equal treatment with the new objectives.
- Looking at how you can document requirements in your ITT documentation.
- Ensuring you capture implied/ express provisions in your documentation.
- Introducing standardisation with the opportunities allowed under a “flexible” procedure.
- Tips on selecting the optimal and innovating procurement methods to reduce risk.
- Managing client expectations to ensure best value for money and compliance with the PA23.

Who Will Benefit?

The webinar will support heads of procurement, procurement officers, senior finance, procurement lawyers, project managers, senior auditors and contract managers who support the development, design and drafting of tender documents.

Programme

09.20 – 09.30
09.30 – 10.00

Join the Webinar
Registration - In Person Events

09.30 – 09.40

Welcome, Introductions and Overview of the Webinar
Mohamed Hans, Solicitor, Procurement Advisor,
CIPFA Procurement & Commissioning Network

09.40 – 10.30

What is an ITT and why is it so important to get right under the Act?
The language and approach to conducting a procurement under the PA23 compared to the PCR2015 is materially different. CAs therefore need to take stock and think carefully around what you include and how you structure your document. This session will cover:

- Overview of the Procurement Act 2023
- What is an ITT and why do we need it?
- What must it include and what are nice to haves?
- How could it be structured?
- How will you deal with the language change?
- Express reliance on the Implied obligations
- Common failures and what you need to look out for?

10.30 – 11.20

Setting up your baseline templates
Regardless of how you design your procedure, there will be some information that can be set up as templates that can then be tailored as and when needed. This includes:

- Part 1 – Background Information
- Part 3a – Submission rules/ procedural requirements
- Part 5 – Conditions of Tendering
- Part 6 – Annexes
- Policy, Objectives and Social Value
- Exclusions
- Conflicts of Interest
- Contract Management

11:20 – 11.35

Comfort Break

11.35 -12.35

Developing and Detailing your Requirements
Before selecting and/ or designing your procedure, it is important to understand what information you have and what you need from the market – either through preliminary market engagement or through how you design/ conduct your procurement. This session will cover:

- Tender Notice requirements
- Associated Tender Documents
- Specification type and detail
- Contract requirements
- Pricing approach
- Timescales
- How and when to engage with the market

12.35 -13.15

Lunch

13.15 -14.40

Mapping out and describing your procedure.

Before you can define your procedure, you will need to understand the available building blocks and how they can be proportionately and transparently used and combined into a sequence (flow chart) that will support you in achieving your goal. This session will cover:

- Notices
- Market engagement
- Excluding suppliers
- Conditions of participation
- Limiting suppliers
- Use of subcontractors
- Tender rounds
- Interaction rounds
- Assessment methodology
- Staged award
- Contract management

Once the process is mapped out, you can then work out how to “describe” this in your ITT.

- Step by step process
- Timetable
- Decision/ approval points

14.40 – 14.50

Comfort Break

14.50 – 15.35

Assessment Methodology

With the PA23 now including contract management, you will need to ensure your assessment methodology is extended to facilitate this. You will need to consider the following:

- What is important to you and how do you communicate this to suppliers?
- Gaps in your associated tender documents
- Information needed to support effective contract management
- Price/ quality and time – how do you evaluate them to support our goals?

15.35 – 15.40

Discussion, questions & 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.