

Andrea Shupinski FCA

## Procurement

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## Introduction

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'...funding is allocated on the basis that every PPN will ensure **best practice in their financial procedures**, and will have an **agreed process in place, consistent with public procurement guidelines** and **approved by the Plenary**, for non-salary expenditures and has a **clear decision-making process.**' *PPN Handbook*

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## Best practice in Financial procedures

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1. Appropriate financial controls/Internal controls
  - System of control/monitoring
  - Keeping and maintaining financial records
  - Prevent and detect fraud
  - Define roles/develop policies
  - Safeguard assets
  - Segregation of duties
2. Appropriate and adequate insurance cover
3. Risk assessment and management
4. Written policies and procedures
5. Transparency and Accountability

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## National Public Procurement Policy Framework 2019

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Sets out overarching policy framework for public procurement in Ireland

<https://www.gov.ie/en/publication/39a1b-the-national-public-procurement-policy-framework/>

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## Key procurement principles

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Procurement transactions and decisions must be

- Fair
- Equitable
- Ensure Value for Money

Be able to justify decisions made and actions taken

Open and transparent competitive process

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## Procurement process Thresholds Goods and Services

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| Value of Contract (ex VAT)         | Process                                          |
|------------------------------------|--------------------------------------------------|
| Less than €5,000                   | Verbal quote – suggest this confirmed in writing |
| €5,000 to €25,000                  | 3 written quotes                                 |
| €25,000 to EU threshold (€214,000) | Tender process advertised on e-tenders           |
| Over threshold                     | Tender process advertised on OJEU and e-tenders  |

Designated authorities

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## Procurement process Thresholds Works

| Value of Contract (ex VAT)           | Process                                          |
|--------------------------------------|--------------------------------------------------|
| Less than €5,000                     | Verbal quote – suggest this confirmed in writing |
| €5,000 to €50,000                    | 3 written quotes                                 |
| €50,000 to EU threshold (€5,350,000) | Tender process advertised on e-tenders           |
| Over threshold                       | Tender process advertised on OJEU and e-tenders  |

Designated authorities

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## Procurement Process Key Essentials

- Equal Terms
- Grounds for Exclusion
- Self-Cleansing
- Conflicts of Interest
- Retrospective Awards
- Use of Standard documents
- Record Keeping

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## Procurement Process Key Essentials

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- Taxation:
  - VAT
  - Tax Clearance Certificate
- Freedom of Information
- Aggregation Rules
- Advertising
- Queries
- Determine the need

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## Procurement Process Pre-Tender Phase - Planning

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- Market Analysis
- Calculate Contract Value
- Budget Availability
- Draft tender document
- Specification
- Selection criteria
- Award criteria
- Timetable

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## Procurement Process Request for Quotes and Award Tender

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- Request for quote (RFQ)
- Keep quotations received on file, evaluate against criteria per the RFQ, keep notes and signed copies
- Tender recommendation report
- Award contract, notify successful and unsuccessful applicants

Designated authorities

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## Other

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- Developing your procurement policy - think about host organisation rules if applicable
- Consider roles and responsibilities
- Approval of P&P
- Review
- If you engaging organisations to conduct annual evaluation must do so in line with the public procurement guidelines
- Written agreement

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## Support available

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Help-desk available to secretariat  
PPN Handbook

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## Useful website links

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<https://www.gov.ie/en/publication/39a1b-the-national-public-procurement-policy-framework/>

<https://www.gov.ie/en/organisation/office-of-government-procurement/?referrer=/>

<https://www.gov.ie/en/organisation/department-of-rural-and-community-development/>

<https://www.gov.ie/en/campaigns/0efa6-public-participation-networks/>

<https://www.wheel.ie/>

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