

**PROJECT INITIATION DOCUMENT DIRECT CALL OFF / DIRECT AWARD FOR LEGAL SERVICES**



*Introduction*

We’ll ask you to complete this document for us to begin working on your project.

Your responses provide us with an opportunity to find out more about the services you require. With this information we can offer you tailored support.

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# Access fees:

It’s free for members to access this framework if they wish to carry out a direct award.

To join SEC to access this framework, fees for full membership are dictated by the number of properties each member has;

* Annual fee on 0.25p per home managed by organisation
* Minimum fee of £1,000 and maximum fee of £10,000

If a client wish to carry out a mini tender, SEC can run the procurement process on the following scales dependant on spend;

* A Small project (up to £50,000) the cost to run a mini competition is £700.00
* A Medium project (£50,000 to £100,000) the cost to run a mini competition is £1,400
* A Large project (£100,00 and over) the cost to run a mini competition is £2,100

**Please note**: these fees do not include the facilitation of the evaluation

# Procurement Guidance

Accessing a SEC framework ensures your organisation is complying with OJEU principles and regulations.

Public procurement rules require any purchase or contract over a certain threshold value to adhere to a strict process as per the Public Contracts Regulations 2015. The threshold values, stated net of VAT, are updated every two (2) years. Frameworks are often used to procure individual contracts above the threshold values. UK policy and EU treaty now requires that all contracts and tender processes – including those below the EU threshold- must adhere to the principles of openness, fairness and non-discrimination. The current OJEU threshold are shown below:



**Services: £181,302**

**Supplies: £181,302**

**Works:** **£4,551,413**

There are 2 routes to calling off a SEC framework – Direct Award or Mini-Competition. You have chosen to use the Direct Award route.

**Direct Award (direct call off)**

You may opt to directly call off from the framework. We can approach the Solicitor of your choice (in the relevant lot) to speak to them about the commission. Alternatively you are able to approach the Solicitor directly.

**What we’ll ask for from you:**

* Completed project initiation document
* A signed authorising agreement. This will be sent with the project initiation document. The agreement shows you are signing up to use an OJEU compliant framework.
* The specification and cost model you would like to use. Also any KPI’s, specific policies etc. which will form part of this contract requirement.

**What we’ll do for you:**

* We’ll arrange for you and the Solicitor to meet and discuss your specific requirements.
* We’ll ask for details pricing agreed so that we can make sure it is compliant with the framework price model.
* We will write a tender report for your approval – if required / applicable
* We’ll send a letter to the Solicitor to confirm the details of the direct award.

Project Initiation Checklist

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| 1. **PROJECT NAME & SCOPE OF SERVICES:**
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| 1. **PROCUREMENT – DIRECT CALL OFF / DIRECT AWARD**
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| Do you require a meeting with the Solicitor to discuss the requirements further or will a phone conversation be sufficient? [ ]  Yes to a meeting [ ]  Phone call will suffice  |
| Once you have met with the Solicitor you will need to let us know; * If you are happy to proceed
* How pricing has been agreed – if bespoke pricing is required this needs to link back to the framework – please send us details so that we can verify this and ensure framework compliancy prior to any award.
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| **Please provide details of the person who will be running this contract on behalf of your organisation, once live.**Name & Role:      Email address:       |
| **When would you like the commission to start?**       |
| **How long will the commission last?**       |
| **3. COSTS – please provide as much information as you can regarding previous costs and future budgets.**  |
| **Please provide the estimated annual budget for this contract**£       excluding VAT. |

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| **Signatory:** **Please sign below to show that you have read and understood the information contained in this project plan.****The initial meeting with the Solicitor will be arranged once this document has been signed and returned to us.** |
| Name:        |
| Title / Position:       |
| Organisation:       |
| Registered Address:       |
| Company Registration number:        |
| Signature:       |
| Date:       |